

## BUILDING CORPORATE VISION AND VALUES - A STRATEGIC SKILL FOR LEADERS

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### ABSTRACT

Any Organization, which knows where it wants to go and how to get there will get there faster. (James C. Collins & Jerry I. Porras, 1994). High performing organizations have vision and values that enable them to reach their goals much faster in the most appropriate way. It also creates a shared goal and purpose in the minds of team members(B.J Dik, et al., 2013; Carton, 2018). Silos are eliminated and high-performance organizations can be created (LaBonte, 2003). Most organizations realize the value of a Vision. It is often attributed as an essential leadership trait (Mackey, 1992).However, most organizations do not know how to define it. This paper sets a process to define an organizational vision. It also helps a leader shortlist and articulate the values of the organization. A vision will increase the speed and the motivation of people who work in the organization to achieve organizational goals. In this conceptual paper, two approaches to building a vision are discussed. Additionally, one approach to defining values is also shared. The approach discussed here could be applied to most small and medium organizations. It is also applicable to a vertical or a division of a large organization. This paper defines an approach that will enable leaders or facilitators to create a vision and define the value for an organization. This conceptual paper discusses an approach for HR Leaders and Consultants to facilitate and co-create organizational Vision and Values.

**Keywords:** Vision, Values, SWOT, BHAG, Rituals, Behaviors

### 1.0 – INTRODUCTION

A vision acts as the 'North Star' for most organizations. It creates a connection between the employees' everyday work and the organization's aspirations (Carton, 2018). The culture of an organization also depends on its vision and its relationship to the world (Bellingham, 2003). The ability to manage continuity and change is often enabled by a clear vision and values. Vision and values in any organization set the direction and accelerate progress. In strategic leadership, a vision is extremely instrumental in setting directions for any organization. It provides clarity about where we are headed. Values on the other hand help organizations define how to get there. Companies that survive and thrive during testing times have a vision (James C. Collins & Jerry I. Porras, 1994). They also have unchanging core values, while their strategies and practices change as required in a VUCA (Volatile, Uncertain, Complex and Ambiguous) world (Codreanu, 2016). While vision guides us toward what is to be achieved, values define how we will achieve the 'what'. A good vision is necessarily inspiring and motivating for any employee working in the organization. Joel Barker concluded that organizations with a vision outperformed those without one (Barker, 1999). Good values are critical when decisions are made. When leaders are confused, values act as a guiding factor. The success of an enterprise is hinged on the decisions and behaviours of all its stakeholders. These actions are guided by values (Bellingham, 2003). It evaluates the

organization's core purpose and how we want to achieve those goals. Some research attempts were made to connect values to vision. It was concluded that to thrive in business, we need leaders who can communicate what their values are. The leader's task is to ensure that these individual values become a shared purpose so that the entire organization has the same vision(Nancy A. Buell, 1992).

This paper could be a guide for HR leaders or Consultants to facilitate a visioning and values building exercise for any organization. This approach is based on our experience with different corporates in helping them build their vision and values.

## **2.0 - PRE-WORK REQUIRED**

Before conducting a visioning session, organizations need to understand their core purpose and ensure that the vision is aligned to its core purpose. The second pre-requisite is to ask all participants to individually build an organizational SWOT (Strengths and Weaknesses are internally focused, while Opportunities and Threats are externally focused). This tool enables participants to review the strengths of the organization and recognize opportunities at hand before the discussion. A SWOT creates an appreciation of the organization's strategic landscape (Mackey, 1992). A template with a SWOT could be circulated to achieve this. The objective is to connect with current reality and work with this information. All critical stakeholders need to be involved, along with representations from different levels including the frontline. A vision set by the leaders in isolation often lacksthe commitment of the front-line.

## **3.0 - THE TWO APPROACHES**

Two different approaches are recommended for building a vision.

1. The first approach involves engaging all hands of the organization and building a vision by working together. A larger team's involvement in building a vision, enables it to be of better quality and keeps it inclusive. A more democratic vision also enables teamwork and helps them outperform their capabilities. This approach also enables commitment from the team. As described in the pre-work, this group could also be a select representative population. This approach helps build a short vision or vision statement of about 35 words, or two to three sentences (Kirkpatrick, n.d.)
2. The second approach involves the senior leader or leaders working in isolation to build the vision. Both these approaches have merits and challenges. This approach is good for a small or medium business. This approach is also feasible for a vertical or a specific part of a large organization. This version of the vision is more vivid and detailed(Cameron Herold, 2018).

We will discuss each of these approaches in detail.

### **3.1 APPROACH ONE - DOING IT TOGETHER**

Good vision needs to be supported by co-workers and employees (Joseph L. Badaracco. Jr., 1998). A Vision also enables them to see the bigger picture (Gallagher,

2003). This approach is inclusive and includes about fourteen steps. Before the meet, the pre-work of SWOT is completed, and people are prepared.

- 3.1.1 Along with the team choose the focus area for the vision. Projects of all sizes and budgets could have a vision. The focus could be about a product, service, idea, or even a vertical.
- 3.1.2 Define your time frame. In consultation with the senior leaders, define an ideal period for the vision. This duration could be as long or as short a period. A Big Hairy Audacious Goal (BHAG) could be for an extremely long period of 10-30 years (James C. Collins & Jerry I. Porras, 1994). However, a vision could also be for a much shorter period. Ten years, five years, three years, one year or even a month. In today's context, many organizations have visibility for the next three years and use this as the often-used timeframe.
- 3.1.3 Place yourself in the future. Individuals who take part in this process are to imagine they are on that day, at the end of the determined time frame.
- 3.1.4 List past achievements that were commendable. The intent is to start on a foundation of positive energy. If team members have had great achievements in the past, there is a higher chance they could be involved in something great again.
- 3.1.5 Create a draft. Quickly write all that can be visualized related to the topic in 08-10 minutes. A vision could be composed in any style, one likes. We often notice a lot of writing in the first three to four minutes. Then, most people slow down. Once most of the data is captured, people are asked to stop.
- 3.1.6 Go for something outstanding and meaningful (B. Shamir et al., 1993). When the draft is created, go for something great rather than something easy. The task is to write visions of outstanding performance — mediocrity may not be inspiring for the future. If individuals fail to describe something great at first during the first draft, they may not be able to pick the levels up later. Write outstanding and inspiring stuff - think about John Kennedy's call to go to the moon (J.F Kennedy, 1962), which was inspiring and aspirational (Carton, 2018). If the first draft isn't intimidating or challenging, then they haven't probably pushed themselves or let out their true desires.
- 3.1.7 Use emotions and wishes rather than logic. An inspiring vision is about passion and dreams of success in the future. It's about what they believe in and what gets them excited. It's okay if others think of some of this as unachievable.
- 3.1.8 Make it personal, send yourself to the future. Write in the past tense as though the goal was already achieved. You are always writing "we have" or "I/we are," not "we will." This language enables personal accountability and ownership.
- 3.1.9 Write in solitude, write quickly. Write continuously for eight minutes. After the first four to five minutes, most writers start to slow down. At the end of eight minutes, stop, and check the draft, review, and edit it.

- 3.1.10 Share the draft with others in small teams. Contrast the written drafts of the vision, combine common themes, and move forward. Reduce the draft to three or four bullet points.
- 3.1.11 The subgroups are combined to form a bigger and a larger group and the exercise is repeated several times. The last team is asked to form a final vision of about 35 words, sometimes up to two to three sentences is generated. The team is asked to present the final vision to the senior-most leader. This presentation enables ownership and accountability from the team. Ensure that the final version is inspiring, exciting, and strategically aligned.
- 3.1.12 The final draft is reviewed in one or two days, finalized, and then shared with stakeholders. Ensure the final Vision is clearly articulated, inspiring and focused on creating value for stakeholders (Aronson et al., 2013)
- 3.1.13 Key advisors may now be consulted to improve the vision. Organization-wide consensus on the vision leads to loyalty and commitment (Mackey, 1992). A good start maybe to dialogue with more supportive leaders and then later move to the challenging ones. It is critical to make sure that stakeholders at all levels are on board with the vision, especially if the leader involved isn't the sole decision-maker. Without this buy-in, it would be challenging to proceed. The idea is to keep improving the document. Enhance clarity on what it means and what it says.
- 3.1.14 Once all stakeholders approve, plan to communicate the vision to all team members, stakeholders, and partners as relevant. Successful leaders inspire and communicate their organization's ultimate aspirations(Bernard M. Bass & Ronald E. Riggio, 2005).They communicate it frequently and hold themselves and others accountable for these. The vision creates intrinsic motivation (Gallagher, 2003)as we convert it into shared goals.

## **3.2 APPROACH TWO – SENIOR LEADER DOING IT ALONE**

While the option of using all hands to build a vision is an inclusive idea, a vision could also be created by an individual leader. When many hands are used to build a vision, the senior leader or the founder's voice is often drowned in the presence of a large team. There's a high chance that the senior leader's inputs have got democratized and is swept under the carpet. When this happens, the senior leader does not have the energy or the will to pursue the vision, which has been defined by the larger organization. To counter this, an alternative approach would be for the senior-most leader to build a vision by himself or herself. This approach may be ideal for a small or medium organization, run by an individual or a small group of stakeholders. This approach is also relevant for a vertical in a large organization. It includes distinct steps.

- 3.2.1 Get off the workplace. It is recommended that the senior leader does not do this visioning exercise at the workplace. The leader must have a change of setting with the least distractions. A preferred place could be in-between nature or any

- place, which stimulates creative thinking and visioning. Keep technology muted. Carry a pen and notebook.
- 3.2.2 Pick your topic. This topic could be about an entire organization, a product, service, idea, or even a vertical.
  - 3.2.3 Define the timeframe. Vision could be for any short or any longer period as cited in the previous approach. A best practice may be to target three years since that is the visibility most businesses have in today's VUCA world(Codreanu, 2016). Place yourself on that day, at the end of the period.
  - 3.2.4 Start with a Mind map(Buzan, 2018). Include the different components of what the organization would like to focus on. This image is a quick visual representation of the Vision(Mackey, 1992). With the Organization or the topic in the middle, draw branches for each focus area. Ensure all the key divisions and any additional focus areas are included. While you place yourself in the future, write down or draw keywords that represent your visualization at the end of the visioning period. Do this for all divisions and focus areas. Go for something outstanding, inspiring and meaningful(Barnard, 1968; P. Selznick, 1957; S.L Oswald et al., 1997). Build a chronology and sequence the different elements of the image.
  - 3.2.5 Voice record and elaborate. Using the Mind map as a reference, create an audio recording of all the different components and elements involved in the vivid vision(Cameron Herold, 2018). Using a voice recorder, record the vision in the most vivid form visualized. Follow the sequence indicated in the previous approach. Make it personal, send yourself to the future.
  - 3.2.6 Transcribe the voice recording into text. Use a support person if available. Once this draft is available as a document, the draft needs to be reviewed and improved.
  - 3.2.7 In one or two days, the draft needs to be re-visited, finalized, and updated.
  - 3.2.8 Read the vision along with key stakeholders and advisors. Based on feedback, the vision is edited and improved. It now has the approval of all relevant stakeholders.
  - 3.2.9 Share the draft with the larger team. Their feedback is sought, and the document is further updated and finalized(Cameron Herold, 2018).
  - 3.2.10 Brand the document and make it look good. Use a professional graphic designer if required.
  - 3.2.11 Externally roll out and share this document with partners and other stakeholders external to the organization includingshareholders, suppliers, vendors, and customers. To succeed, an organization will need everyone's buy-in (Joseph L. Badaracco. Jr., 1998). A vision needs to be clearly communicated and easily understood by everyone (Mackey, 1992)

3.2.12 Action plan and ensure progress, work backwards from the end goal. With the team, create a work breakdown structure on Excel for each goal area cited in the vision document. Create smaller milestones so that the larger goal could be achieved. Mark timelines and owners against each line item. Review and update the document as required.

In this approach, the business vision is detailed, descriptive and thorough. All involved in the business should fully understand the Vision. A Vision creates a higher purpose (Sparks & Schenk, 2001). By sharing the vision with all partners, affiliates, and collaborators, everyone involved in the growth of the business resonates with the big picture and also internalizes this into their belief system (Gallagher, 2003). Update the Vision every three years!

#### **4.0 DEFINING VALUES**

Values and Vision go hand in hand. Values help an organization define 'how' to get to the vision. A powerful vision must embody the core values of the organization. Values help us in difficult times. During times of adversity, the values of leaders are tested (Bennis, 1959). All key decisions should be made using the lens of the values. Values differentiate organizations and people.

Values are short belief statements that guide actions. When an individual or a group of people are guided by certain qualities, principles or belief systems in what they say and do, these are called values (Michael M. Lombardo & Robert W. Eichinger, 2009). Values guide organizational decision making and all operational processes. Those qualities considered to be important could be called values.

A belief system that relates to the worth of an idea or type of behaviour may also be called a value. Some people see great value in saving our wildlife or our forests. However, a person who relies on cutting down trees for building homes may not place the same value in the forest or its wildlife, as a person who wants to save it.

Values influence most judgments we make as well as have an impact on the decisions we make to support our customers. Every Organization needs to introspect and articulate what it stands for and how it wants to deal with its stakeholders.

All organizations intending to thrive need to have a set of clearly articulated values.

The following steps could be used to define values for any organization:

4.1 A list of values commonly found is listed. Refer to Table 1 for a more detailed list. This list could be modified to include certain values which are not here.

E.g.: Humble Friendship Empathy Quality Hard-work Purposefulness Fulfilment Creative Strength Relationship Fun Organization Creativity Excitement Happiness Honor Innovation Efficiency Trust Growth Community Integrity Accountability Sincerity Loyalty Love Persistence Commitment Flexibility Honesty Cooperation Excellence Collaboration Adventurous Respect Dependability Memorable Fairness Unity Patience Passion Continuous Improvement.

- 4.2 Engage representatives from many levels. Use a stratified sample spread across cross-sections of the organization. This approach involves engaging this group and working together to define values. By getting a larger team to contribute, expectations are set and role models for values could also be identified. Individuals are asked to choose five or six from the given list sample list (Refer Table 1).
- 4.3 This list picked by everyone is discussed and debated in small teams. Individuals are expected to together narrow down the choices to pick three or four as a team.  
  
The shortlisted values are shared and articulated in the larger gathering.
- 4.4 Multiple teams are combined, and the task is repeated. Teams are again expected to together narrow down the total number of choices to pick four or five as a larger team, and then as a combined team. The final four or five values are listed.
- 4.5 Next the team is expected to describe and define behaviours required to be demonstrated for each value. They need to show actions that employees or team members should or should not do in the process of demonstrating those values. Individuals need to share what each value stands for and what it does not stand for. These behaviours help us define what is expected and what is to be avoided. Refer Table - 2 – Defining Behaviors Sheet.
- 4.6 Once each value is articulated, leadership and all stakeholders review it to finalize it.
- 4.7 After values are articulated and finalized, there is a need to institutionalize and propagate these values so that this is integrated into the DNA of the organization.
- 4.8 Ways to institutionalize these include:
  - Designing social rituals(Aronson et al., 2013) so that people committo those values on a day-to-day or a periodical basis.These rituals reinforce values(Mackey, 1992). Social rituals may include social events or unique ceremonies that are repetitively done.
  - Leadership reflects these values in all or most of its communication. Leaders need to, in all their opportunities, articulate the values of the organization internally and externally.
  - Embed these values into all the decisions and our day-to-day patterns and behaviours. Use these to assess existing and prospective employees. Ensure the presence of aligned values is assessed through behaviour based questions while hiring. When an employee is promoted, ensure those with the right values are given the opportunity. All leaders need to translate values into action(Joseph L. Badaracco. Jr., 1998)

These steps ensure a value-based organization.

## 5.0 LIMITATIONS

The approaches mentioned here are ideal for small and medium organizations. Large organizations may find it difficult, considering their size and complexity.

The leader's vision may not get enough weightage or consideration when approach-one of Visioning is used. While the approach is extremely democratic and ensures ownership and accountability from the team, the Senior Leader may not be as committed to the final vision when using this approach.

## 6.0 CONCLUSION

While Vision and value building is considered a complex task, these two approaches help simplify the complexity involved. In the paper, two approaches are deliberated. While one includes participation from multiple team members and stakeholders, another was individual. Both are possible options. Values define how organizations achieve the vision, and it is equally important. Vision and values often go hand in hand, one does not operate in isolation. They both lead to an ideal corporate culture, which is a by-product of every person in the organization (Gallagher, 2003). These steps would be extremely handy and would operate as a guideline for an HR consultant, or an external consultant to facilitate the creation of vision and values.

## 7.0 APPENDIX

### 7.1 Sample list of Values

Profitability	Humble	Friendship	Empathy
Responsiveness	Quality	Hard work	Purposefulness
Success	Fulfilment	Creative	Strength
Appreciation	Relationship	Fun	Organization
Customer Focus	Creativity	Excitement	Happiness
Responsibility	Honor	Innovation	Efficiency
Security	Trust	Growth	Community
Knowledge	Integrity	Accountability	Sincerity
Professionalism	Loyalty	Love	Persistence
Recognition	Commitment	Flexibility	Honesty
Originality	Cooperation	Excellence	Collaboration
Empowerment	Adventurous	Respect	Dependability
Energy	Memorable	Fairness	Continuous Improvement
Team	Patience	Passion	Unity

Table - 1 – Sample list of Values



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