

How to set a bold Vision



Hi there!

This tool will help you set a bold vision for your organization.

We define a vision as:

An expression of where you want to be or what you want to have achieved over a specified time horizon—typically around 3-5 years. A vision must be specific, clear, and bold, and can be expressed in many different ways (e.g., degree of impact, financial, market position, or reputational metrics). A vision will have to be updated every few years at a minimum as you achieve your goals and the world evolves.

Ideally, your organization will already have defined your Purpose which will be the North Star as you set your Vision. This tool has been written under that assumption. But we recognize that business planning has to go on even if you don't yet have a defined purpose. So if you need to, skip step 1 in this tool.

While this tool will help you write a vision statement, we recommend that you use this just to help you start thinking about your organization's vision, not to actually try and decide what it is for your organization. That work must be done as part of an intentionally-designed inclusive process that engages the right people in the right ways at the right times.

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**You'll go through 5 steps
as you use this tool**

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1

Use your Purpose as a guide

Everything you do should be grounded in and inspired by your Purpose. If you don't remember it by heart (we promise not to judge), look it up and write it here:

Our Purpose:

Pretend you have a nearly unlimited budget and all the time in the world. But the laws of physics still apply and we probably still don't have those damn flying cars we were promised decades ago! What's the purest, most powerful way you can imagine living your organization's Purpose? What impact would you have? Whose lives would you have improved? What would it look like? Think big!

2

Imagine what
you can
achieve within
3-5 years if
you're truly
living your
Purpose

Now that you've imagined your future impact in a world of unlimited money and time, let's come back to reality. At least a little.

What is a significant milestone you could reach within 3-5 years as a step toward what you wrote above?

Consider:

- How many people could you impact?
- What do you want to be known for in your industry? In the world?
- What would it look like financially if you're wildly successful?
- What can you create or achieve?

In 3–5 years we will be / be known as / have...

3

Choose a metric you'll use to define success

Whether your Vision will be articulated in impact, financial, positional, or reputational terms, you'll need a specific metric to reach for.

For example...

Impact: # of people touched, impact on the economy, how (and how much) you've changed lives, etc.

Financial: revenue, profit, growth rate, etc.

Positional: market share, #1 at X, etc.

Reputational: known as the leading X, etc.

There are very few wrong choices—in step 5 you'll have a chance to refine this. For now, take what you wrote above in step 2 and, if necessary, make it more specific and clear. And choose your time frame. We like 5 years because it gives you enough time to be truly bold. But choose what works for your organization.

In 3–5 years we will be / be known as / have...

4

Make it bolderer

Whatever you wrote in step 3 as your Vision statement, can you make it faster or bigger? If you sped up and could achieve your 5-year Vision in one year, what would you then want to achieve within the next 4 years? Perhaps set that as your 5-year Vision. Or imagine achieving 10x of your 5-year Vision. Can you find a way to do that?

Look at your current Vision draft and ask yourself...

- Would this shock anyone?
- Would it shatter people's assumptions about what's possible?
- Am I unsure how we will achieve this?

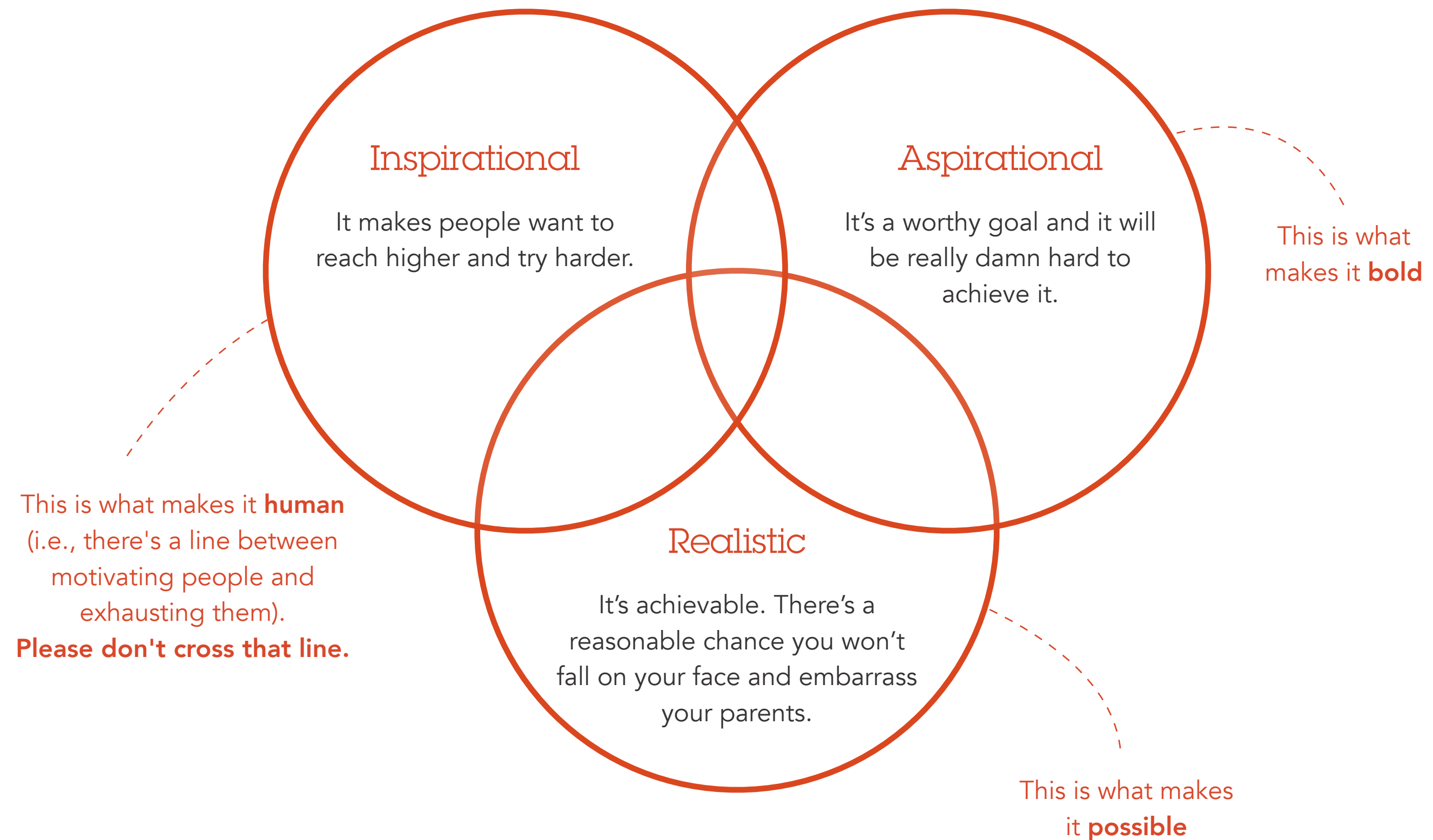
If your answer to any of those questions is no, your Vision is probably not bold enough. If so, write a bolder version here.

In (X) ___ years we will be / be known as / have..

5

Check and refine your Vision statement

A good Vision meets the following 3 tests.
It is...



In (X) ___ years we will be / be known as / have..



“Whatever you are,
be a good one.”

– Abraham Lincoln

That's it!

We hope you found this helpful. If you need help articulating your Vision, developing a strategy to achieve it, and rallying your team around it, we'd love to chat. Send a note to: adam@ruleno1.co

