

Follow this exercise to create a vision statement:

A. Make sure everyone has writing materials. Ask people to sit quietly and relax. Note that “. . .” in the text below indicates pauses. Don’t rush this visualization process. People need time to settle in and explore images.

B. Say: “For the next couple of minutes just sit quietly. Don’t write anything, just relax. Imagine the future — eighteen months from now. Imagine our organization has become everything we’ve hoped for.” (Note: You may want to be a little more specific here. For example, if you have just made your first sale, you might ask people to imagine the profits and increase of clients acquiring your product or service.) Continue: “Allow an image to come to mind. What does this ideal picture look like? Explore this image. . . . Who is in it? . . . What’s going on in the scene? . . . What makes it so ideal? . . . What are people saying? . . . What are they doing? . . . Now, let that image go. . . . Allow another image to come into view. Explore this image. . . . Who’s in it? . . . What’s going on? . . . Where are you in this scene? . . . What’s it feel like to work here? . . . Now, allow this image to fade. . . .”

C. “For the next three minutes, write down what you envisioned during this exercise. Please don’t talk during this exercise.” Allow time for writing.

D. “Please sit quietly again and close your eyes. . . . Imagine that time in the future again. . . . A reporter from The Wall Street Journal is going to do a story on your organization. The reporter’s focus is on why you are the leader in the industry. What would you show the reporter as examples of things that make you particularly proud? . . . Be specific in your thinking and explore this image in some detail. . . . Perhaps the reporter is asking you questions. How would you respond? . . . Allow this image to fade. Please open your eyes.”

E. “Take a couple of minutes to write down the images that came to mind during this last visualization exercise.” Note: Pick a publication that has meaning for your organization. It doesn’t have to be The Wall Street Journal.

F. If you are doing this exercise with your team, organize yourselves in pairs and talk about what they envisioned. Person “A” talks for 10 to 15 minutes, person “B” finds out everything they can about what A envisioned. Switch roles. It is important to keep the attention on the speaker. When A is talking, B should be in listening mode —asking questions, clarifying, etc. B should not be giving his/her/their thoughts during this round. When you switch, A should follow the same guidelines.

G. Give each pair three index cards or large Post It notes. Ask them to pick three items to share with another pair. Organize teams of two pairs and ask them to share their three items and summarize their ideas into three items only. This exercise is allowing you to find commonalities, receiving input from all your team members, and working together selecting the strongest ideas. If you are more than four members, put together two groups of four, until you collect everyone’s vision in three ideas.

H. In full group, review your top three ideas and start drafting your Vision Statement. Each idea could become a sentence in your Vision Statement.



A vision statement should stretch the imagination while providing guidance and clarity. It will inform direction and set priorities while challenging employees to grow. But most importantly, a vision statement must be compelling, not just to the high-level executives of your company, but to all employees.

Based on experts' advice, here is a list of what to keep in mind when formalizing a vision statement:

- Project eighteen months in the future. (Once your business grows you can do it for five or ten years).
- Dream big and focus on success.
- Use the present tense.
- Use clear, concise and jargon-free language.
- Infuse it with passion and make it inspiring.
- Align it with your business values and goals. (You are going to create them in the following sessions, so come back and review and re-align).
- Have a plan to communicate your vision statement to your team.
- Be prepared to commit time and resources to the vision you establish.

