



Building Shared Vision

~ process tips

A successful large-scale envisioning process needs to:

- *Embody the future you want to create* – beware contradicting the message in the ‘social architecture’ of the event or in the design of the activities.
- *Be designed to achieve a compelling purpose* – use a planning team which represents a good cross section of potential participants to ensure that this is the case and that you choose the appropriate place on the tell to co-create continuum.
- *Take account of large group dynamics and adult learning¹* – it is not an exaggeration to say that anything can be achieved with a large group. Once you are clear about what you want to achieve the rest is detailed process design and the logistics organisation needs to successfully expedite.

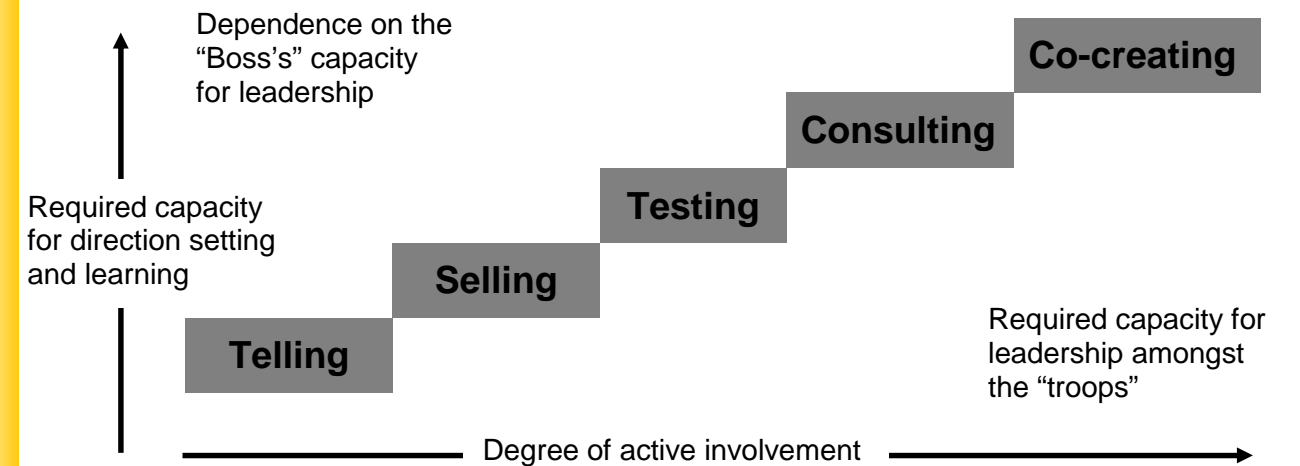
An interactive large-scale process can be used whatever approach on the continuum you choose. Even ‘telling’ can be done imaginatively and creatively and can support the kind of conversations that will accelerate change.

Further reading

Title	Author(s)	Publisher	ISBN Number
The Fifth Discipline Fieldbook	Senge, Ross, Smith, Roberts and Kleiner	Currency Doubleday	0 385 47256 0
Large Group Interventions	Alban and Bunker	Jossey Bass	0-7879-0324-8
Meetings by Design	Beedon, Bender, Brooks, Braisby and Cox	VISTA Consulting	0 9541470 0 6
Terms of Engagement	Richard Axelrod	Berrett-Koehler	1 57675 084 1

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There are two schools of thought when it comes to visions. On the one hand it is believed to be the responsibility of leadership to develop and articulate a powerful vision. On the other it is advocated the ‘people support what they help to create’ so visions should be co-created by people across the organisation. Neither are wrong!

There is a case for the role of leadership in having and articulating a vision. However it should not stop there. You can have your cake and eat it to too if you think of the process of developing common vision as having a continuum of options. The diagram below, developed by Bryan Smith and described in ‘The Fifth Discipline Fieldbook’, shows this continuum as a series of steps.

The approach that you choose will depend on a number of factors including how much you want to develop leadership capacity throughout the organisation and the urgency of the situation. The matrix overleaf unpacks the diagram further looking at the reasons why you might choose an approach, tips for doing it well, limits and issues it raises and processes for engaging large numbers of people.

Studies at the UCLA Centre for Effective Organisations have shown that, whatever approaches to change you choose, a critical factor in fast and successful implementation is the extent to which people engage in conversation, dialogue and discussion. The art is in designing processes that engage people in those conversations and match the appropriate level of co-creation. These conversations can be in multiple small groups or can bring together the whole organisation in one large gathering. Large-scale conversations need careful planning, but can be immensely powerful in embodying and developing a compelling sense of common vision.

¹ See VISTA’s paper ‘Interactive Large Group Conferencing – engaging people in change’



	<i>Reasons</i>	<i>Tips</i>	<i>Limits and Issues</i>	<i>Processes</i>
Telling	<ul style="list-style-type: none"> ▪ Dramatic change is needed ▪ The organisation is facing an urgent crisis ▪ No time for wasted energies ▪ A lot of work has been done already which must not be wasted 	<ul style="list-style-type: none"> ▪ Direct clear and consistent messages which explain the reasons for change ▪ Be truthful and explain where aspects are confidential and why ▪ Be clear about what is negotiable and what is not ▪ Make the vision positive ▪ Paint the picture with specific details and allow people space to make it their own 	<ul style="list-style-type: none"> ▪ People only remember 25% of what they are told ▪ You may get little more than compliance ▪ It may be perceived as 'poor' communication ▪ Some resistance and frustration is likely 	<ul style="list-style-type: none"> ▪ Letters ▪ Videos ▪ Personal speeches ▪ Presentations
Selling	<ul style="list-style-type: none"> ▪ Build on the telling of the message ▪ To engage employee commitment ▪ Treat the employees as 'customers' of the message ▪ Deal with the passive responses and resistance 	<ul style="list-style-type: none"> ▪ Keep channels open for responses ▪ Support enrolment and not manipulation ▪ Build on the relationship as if they were valued 'customers' ▪ Do not take people for granted ▪ Invite a response 	<ul style="list-style-type: none"> ▪ A compliant 'yes' may still seem like the best answer to keep your job, so people may not be honest ▪ People may not feel they can make a difference ▪ People may 'go along' with it rather than commit to it 	<ul style="list-style-type: none"> ▪ Speeches and breakout groups ▪ Discussion of vision using De Bono 6 hats techniques ▪ Discussion of vision with connections approach – allowing people to move to the areas they have least and most energy ▪ Discussion of vision with development of personal visions and ideas for action ▪ Allow people to brainstorm their ideas for how to implement aspects of the vision – on Post-It™ Notes and use these for planning
Testing	<ul style="list-style-type: none"> ▪ People have not 'bought' the vision sold to them ▪ Telling and selling has been unsuccessful in the past ▪ You are uncertain of all aspects of the potential vision and you know people are closer to some of the stakeholders ▪ You want to compel/galvanise people to discuss and consider the proposed vision ▪ A false yes can be worse than an honest no 	<ul style="list-style-type: none"> ▪ Lay out the vision for testing in a way that finds out what people are excited about ▪ Provide as much information as possible to enable a quality response ▪ Make a clean test – do not set it up intending them to choose what you want and think it was their idea ▪ Protect peoples' privacy and make the process anonymous ▪ Test for motivation, utility and capability 	<ul style="list-style-type: none"> ▪ Not enough space to express all of their hopes and concerns ▪ Limits the discussion to the proposals and does not test the process itself ▪ Depends on peoples' willingness to tell the truth and to perceive current reality ▪ A passive, dependent organisation may still respond passively 	<ul style="list-style-type: none"> ▪ Questionnaires ▪ Interviews ▪ Voting techniques ▪ Discussion of vision with development of personal visions and creation of consensus on common themes as validation/testing ▪ Discussion of vision with multi-dot voting
Consulting	<ul style="list-style-type: none"> ▪ You recognise you do not have all the answers ▪ Want to make the vision stronger ▪ Want people to be fully engaged in thinking through the ramifications ▪ You need to reserve the right to accept or ignore what people say 	<ul style="list-style-type: none"> ▪ Encourage people to share information so they build a whole picture before adding their ideas ▪ Make sure the initial message is clear ▪ Allow anonymity, constructive disagreement and surfacing of different mental models ▪ Do not try to tell and consult simultaneously 	<ul style="list-style-type: none"> ▪ Fear of being overwhelmed by the responses and options ▪ Members may say 'the vision is your job' ▪ Pressure to finish quickly may result in a compromised vision ▪ Limited by the tacit, often unquestioned assumption that one single vision is needed rather than multiple overlapping visions 	<ul style="list-style-type: none"> ▪ Focus groups ▪ Surveys ▪ Cascade discussions with facilitation and feedback ▪ Sharing of information with presentation of draft vision, inviting comments and real time turnaround of changes ▪ Development of vision with building of personal visions and action plans
Co – Creating	<ul style="list-style-type: none"> ▪ To evoke and allow a personal response and a creative orientation ▪ You want to build a culture of leadership at all levels ▪ You need to mobilise everyone ▪ You are open to multiple interdependent visions 	<ul style="list-style-type: none"> ▪ Start with personal visions – yours and everyone else's ▪ Make space and time for alignment ▪ Treat everyone as equal ▪ Encourage interdependence and diversity ▪ Have people speak only for themselves ▪ Focus on the dialogue not just the statements 	<ul style="list-style-type: none"> ▪ Will surface tensions between people and departments ▪ Needs the space and time for dialogue, and processes which develop the skills ▪ May need to experience testing and consulting before being ready for this 	<ul style="list-style-type: none"> ▪ Team sessions to do personal and team visions building up to inter-team and whole event sessions ▪ Whole system events like search, future search, open space and real time strategic change ▪ Skits and enactments of hopes and desires ▪ Pictures and metaphors of the ideal images of the future potential ▪ Exploration of scenarios of potential futures ▪ De bono opportunity search for possibilities ▪ Full sharing of ideas about the past and present of the organisation, generation of possibilities for the future with consensus development of most promising pathways