

Towards higher levels of effectiveness...

# Visioning: an energizing tool

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*A traditional quality teams program focuses on discovering and solving problems to improve quality and productivity. Linda Ackerman calls it solid state management which focuses on maintaining a steady or status quo organizational state.*

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**S**teady-state quality teams tend not to explore what the members desire to create or the type of group that they desire to become. A steady-state quality program assumes that operations, products and services are basically valid for the existing situation and that the group's energy should be directed toward fixing what exists and not toward exploring new ground.

## Creativity blocks

**Focusing in what is** — Focusing on discovering problems only in what exists can also lead to a psychologically disempowering state. The term problem illustrates this point. Within our society, problems are viewed negatively. For example, one definition in *Webster's Dictionary* of the word problem is "not well adjusted in behavior." This is the definition used in many organizations. Recall the last time people talked about the "problem child" in your organization. Did this characterization have a positive connotation? How many people are rewarded in business for pointing out problems?

Individuals with low self-esteem have difficulty accepting error and tend to disown it. Organizational life is no exception. James O'Toole has noted in his book, *Vanguard Management—Re-designing the Corporate Future*, that American executives love to hear how excellent they are, but disown their failings. Within an organizational context, this means that focusing on problem discovery may be threatening to management, supervisors and employees.

The result of such activity is likely to be conscious and unconscious behaviors directed toward eliminating the threat to their self-esteem—the quality teams program.

**Let's go for little wins** — Focusing on small problems for early wins can lead to problems as well. Advocates of quality circle programs point out the importance of wins early in the process. This may result in a tendency to focus on small issues that are not considered important to the effectiveness of the unit. Richard Foster in his book *Innovation* notes that identification of small issues can be highly annoying to a manager because of his or her ego involvement in the department. Depending upon the nature of the organization's culture, presentation of insignificant issues can cause the manager to look bad to peers and upper-level managers. The result may be loss of support for the quality circle process because it is ego threatening.

## Visioning: an end run around creativity blocks

Focusing on minor issues and the ensuing perceived threats to manager's self-esteem can prevent a quality teams process from achieving its full potential and may lead to its early demise. How can these creativity blocks be overcome? One strategy is to use visioning—an organizational transformation process.

Visioning focuses group energy on what its members desire to create. It is opportunity directed.

It focuses on effectiveness and is empowering through its use of intuition, creativity and innovation. Visioning can foster the questioning of existing assumptions and beliefs. The process is directed toward creating an end state and as such directs energy toward the future rather than the past. Visioning is a holistic approach that serves to motivate continuous action and concentrates of creation rather than fixing.

**The puzzle metaphor** — Putting a puzzle together, is a useful metaphor to illustrate the difference between problem solving and the visioning process. Visioning can be likened to having a picture of the puzzle as it will look when completed. Traditional problem solving is more like putting the puzzle together without a notion of what the final product will look like. Without an image of the puzzle in mind, it is extremely difficult to solve. And ends up playing with the pieces of the whole picture. A vision of the whole picture gives an individual a sense of how the pieces will fit together. It presents an end state to be achieved.

**Visions talk to you** — A vision is also a communications tool. It communicates to others who and what a particular is and where it is headed. The clear direction of a vision attracts the energy of members of the group. Members can see the benefits they will receive while and when the vision is created, and give it their support. Problem solving does not necessarily possess this attribute. Members of a quality team and other groups in an organization may not understand how they will benefit from problem solving and the changes it involves. In fact, they may view quality team activities as a threat because they may be required to change without understanding how they will benefit from the change.

If managers create the quality team process as part of a visioning process, they send a message that the process is not a passing fancy or fad. This may create a stronger level of commitment to the team process. In fact, a quality teams program vision must be a part of a meta-vision of organizational change. This meta-vision should provide direction for all aspects of the organization.

### Visioning versus goal setting

There are a number of differences between goal setting and visioning. These differences reflect the changing nature of our times and the people who inhabit our organizations. The differences between visioning and goal setting also illustrate

the benefits of the former. In a recent interview in INC., John Humphrey stated that goal setting has become obsolete because organizations can no longer assume a static environment. A rapidly changing world requires the creation of a vision which provides both direction and flexibility.

In a competitive environment, organizations and their units are required to become more customer directed and less product oriented. Goal setting tends to focus on the group or the individual. Visioning focuses on customers and on creating a deep sense of purpose. Visioning can be likened to the concept of a “calling” which focuses on service to the community. Visioning requires customer input and makes explicit the assumption that the group is a holon; that is, it is both independent and a dependent part of a large purposeful system.

Visioning focuses on community creation and is not team focused. The purpose of the vision is to create a context in which other members of the organization can feel a sense of spirit and community with the quality team. Visioning involves intuition and emotion. Goal setting, in the ordinary sense of the term, is not inspiring and does not create passion. A goal, for example, of decreasing defects by ten percent is hardly inspirational when compared with a vision of creating a beautiful product which enhances the life of each person who purchases it.

Goals are the means for achieving the vision. With changes in the environment, goals may change while the vision will not. For example, the vision of the beautiful and life enhancing product may initially involve decreasing defects by ten percent. However, it may be later discovered that customers desire a new design and the ten percent goal becomes irrelevant.

The US Constitution is visionary, while the laws to implement it are specific goals which help to achieve the vision. The Constitution has been amended and many laws passed and rescinded. The basic tenets—the vision of the Constitution has not.

### Applications of visioning

**Visioning has been employed successfully** — A number of authors, Warren Bennis, Amir Levy, Uri Merry, Noel Tichy and Mary Anne Devanna have examined this transformation in organizations and have found that individual transformational leaders gave to their organizations a

clear vision and new purpose to fulfill. These leaders, the authors found, provided their organizations with a new sense of direction. But visions are not necessarily created by a transformational leader, CEO, or executive group. They can be created by a network of people sensing a need for transformation of their organization.

William Belgard, Kim Fisher and Stevin Rayner studied such groups and found that they create a common vision and the energy for beginning the transformation. They influence and educate upper management and their peers. They create an awareness of the need for change, but the authors note, they do not formally initiate or direct the transformation. Ford, Chrysler, Whirlpool, Ciba-Geigy and National Steel Corporation are examples of such transformations.

*Entrepreneurs and visioning...* Visioning has been employed by the entrepreneur to provide a sense of purpose and direction for his or her new firm. The vision in this organization tends to affect the formation of the firm's culture. Apple Computer and Ben and Jerry's Ice Cream are notable examples of this type of organization.

*Managers and visioning...* Visioning has been used by managers within organizations. In his book, *The Empowering Manager*, Peter Block discusses his use of visioning for directing his training division. He cites other examples and discusses the skills required by a manager to create and maintain his or her vision in an organization which is not necessarily supportive of change.

*Team visioning...* Visioning can be used to transform a work group of a quality team that is not in alignment with its environment. A quality team or an entire quality team program which reaches a point where it has out grown its mission, might use the visioning process to re-vision the purpose of the program. The result could be transformation into self-managing work teams.

### Concepts for creating a team vision

How is a vision created? It begins with the awareness of a felt need to change, and the recognition by team members that they possess the energy to create a more enriching future. The vision comes from within. Linda Marks, in a 1986 article in *Catalyst* notes that the vision comes from the dreams of the group.

**Guided visualizations** — The visioning process involves the use of intuitive techniques that stimulate the right side of the brain. Guided visualizations are an example of one technique. In a guided visualization, members of the group are presented with a series of questions or issues which they must address as individuals and as a group. Members might also be asked to keep a journal of their insights during the visioning process. These insights may then be used to create the group's vision for itself.

**Drama and play** — Cathy DeForest suggests using theatrical and playful techniques to help set the mood for the visioning process. She suggests, for example that a high technology firm might have the facilitator dress up a *Merlin the Magician* to lead the session. Care should be taken to assure that all senses or modes of processing information be used. Techniques involving mental imaging should be augmented by storytelling and the creation of a physical model of the desired future state. This will help involve those who lean more on auditory and kinesthetic senses for creativity.

**Evaluating the vision process** — Criteria need to be established for evaluating the vision. One set that might be used is that developed by Abraham Maslow (*Maslow's B-Values*). A group using this set of values would create a collective definition of each of the B-Values. They would, for example, create three to four statements on what truth means to them. These definitions are employed to evaluate a draft version of the vision. The vision statement also should be assessed for its energizing capability. This means it must stimulate performance and a high level of commitment to its achievement. A simple technique for checking the vision's energy level is to have each member of the visioning group rate the draft vision on a ten-point scale.

**Developing a personal vision** — Each member of the vision team should also create a personal vision which is in alignment with the team's desired future state. A personal vision should provide each individual with a sense of his or her place in making the vision a reality.

**Celebrating the vision** — The creation of a vision is an ending and a beginning. A group needs to rejoice in its past achievements and celebrate the beginning of their journey toward the vision. During the celebration, they should create group and personal symbols which represent the end

and beginning. They should communicate stories about their past achievements and their desired future. These stories should be shared with the rest of the organization. The stories should inform other organizational groups of the benefits that can be created, by the journey itself and the achievement of the vision. This type of celebration should include individuals who will share in the creation of and the fruits of its realization. Such a celebration will begin to create the energy needed to fulfill the vision.

## A process example

The first step in the visioning process is data collection. The data to be collected is divided into two types: inner and outer. Inner data focuses on select characteristics of the members of the group. It includes, but is not limited to, thinking styles, life style orientations and information processing styles.

**Internal data** — The values and life style (VALS) typology of the Stanford Research Institute is a useful tool for understanding life styles of members of a group. This system categorizes people into the following groupings: *Sustainers, Belongers, Emulators, Achievers, I am me's, Experientials, Societally Conscious* and *Integrated*.

Dudley Lynch has developed a useful set of tools which measure brain dominance that might also be used in designing visioning experiences. Lynch suggests that there are four thinking styles: *I-Pursue, I-Control, I-Explore* and *I-Preserve*. In designing a visioning session for *I-Preservers*, the experience should be warm, caring and focused on how the past relates to the future experience. *I-Explorers* will require an experience which allows them to play with alternative methods and should emphasize change.

A survey of participants should be conducted to determine the dominate information processing modes. The neuro-linguistic programming model developed by Richard Bandler and John Grinder categorizes individuals according to whether the individual's dominate mode of processing information is kinesthetic, auditory or visual. This data will help the facilitator design a visioning session that coincides with dominate mode of the group. Without this step, the visioning session may be ineffective. For example, requesting a group composed primarily of *Belongers*, who's thinking style is *I-Preserve* and who process information kinesthetically to visualize the future by means of guided imagery would not match with the group's

predominate style. An effective session for this group might begin in reviewing the past, moving the group into the future and would involve creating a physical model of the future

**External data** — This data should focus on the needs and desires of the group's customers and external trends which will affect the group. An example of such a trend for a quality team in a manufacturing environment might be the introduction of robotics.

External data can be collected by the facilitator, group members or both. Data collection methods might include some or all of the following: assessing customer perceptions of the present and the future (using such tools as focus groups, surveys and informal discussions), interviews with top management, talking with experts and reviewing literature in various fields which impact the organization and reviewing the organization's existing policy and mission statements.

Both sets of data should be utilized by the facilitator to design the visioning session. The external data will serve as a reference points with which participants can compare elements of their vision.

## The session

A review of the inner data will help the facilitator to design a presentation which will fit the participants. If, for example, the group consists mostly of *I-Explorers*, who process information visually and who are intuitive personality types, the facilitator would likely choose to use a lot of visual aids which focus on the future and begin with the big picture.

**Presentation of inner data** — After describing the goals of the session and briefly outlining the session agenda, the facilitator would present the group's inner data. He or she should focus on how members of the group differ and how those differences will both fuel the group's creativity and help it to maintain balance as it moves toward establishing a vision which can be implemented.

**Presentation of external data** — Keeping the group's inner data in mind, the facilitator with the past, present or future. For example, a group composed primarily of *I-Preserve* individuals would be most comfortable with beginning with a review of the past, then the present and finally a glimpse of the future.

**Alternative futures and pasts** — The group should then begin creating a number of alternative futures for the organization. It is important for the facilitator to emphasize that in a rapidly changing environment that the future is not likely to be a linear projection of the present. To emphasize this point, the facilitator might have the group review past life events to see how different choices at critical times would have created alternative results.

*Beliefs and assumptions about the future...* The group should explore their beliefs about the future and the assumptions upon which those beliefs are based. If members of the group assume that future efforts will bog down because past renewal efforts have fizzled out, they may well create self-fulfilling prophecies of failure in the future unless those assumptions are challenged and changed. One useful approach to examining these beliefs and assumptions is to use open ended statements like those developed by Nathaniel Branden. Examples of such incomplete sentences are: “my view of the future is...,” “my view of the future is based upon...” and “my view of the future is based upon the assumption that...” At this point, an explanation or review of the phenomena of group think might also take place.

The purpose of this stage of the process is not to decide upon a specific future. It is to design a context and mindset in which group members begin to think about alternative futures. Success at this stage is very important in assuring that the resulting vision is not too closely bound to the present or the past.

**Creating the vision** — The core of the session is creating the vision. There are a variety of techniques which may be employed. If guided imagery is used, the facilitator begins with a relaxation phase and then asks participants to imagine that they are going into a time machine which will transport them into the future of their organization for five or ten minutes. When they return to the present each member of the group is asked to write down what they saw, heard, or felt.

Then the facilitator requests that each participant write a short (no more than fifty words) statement about their vision of the organization's future. After the statements are shared with the group, the statements are ranked according to preference on a one to ten point scale.

The statement receiving the highest score will serve as the draft vision statement. Members of the group then discuss and revise the vision until the group is satisfied with their statement.

Exercises to examine that statement against constant values and to inject one more burst of insight might then be conducted. Maslow's B-Values can be used to evaluate the values embedded within the vision. Depending upon the makeup of the group, the facilitator should have the group go through an exercise which will stimulate new insights, Random word associations, *I Ching*, brainstorming and other methods which encourage new insights can be used. These insights are shared and the vision is modified to reflect these new thoughts. The vision is considered complete at the end of this exercise.

**Creating personal visions** — The group is asked to review their notes from their visit to the future and the completed vision statement so that they may write their personal vision statements. This statement will define how each member is going to contribute to making the group's vision a reality. Group members should rate their personal vision on an energy scale to check whether it will be strong enough to carry them through low periods which may occur as they implement their vision.

**Session closure** — The facilitator concludes the session helping the group mark the end of one era and the beginning of a new one. It is important to recall positive traditions or events and to bury those which the group feels were negative. It might be useful to keep a written record of this portion of the exercise so people who join the group at a later date will be able to experience the group's journey.

Celebrating the vision and the work which has created the vision should be as festive as possible. During this celebration, members of the group should again share their thoughts about the vision and how it will help them create a future of their choosing.

### Teams and organizational renewal

Quality teams and employee involvement teams represent more than a vehicle for improving quality and productivity. They are a means for constant organizational renewal in the face of changing external environments. This renewal process creates a context for product and service innovations .

Quality teams also provide a structure to increase commitment to the whole organization and to share and serve the goals of the whole organization. Viktor Frankl notes in his book, *The Unconscious God*, man grows toward his fullest potential by going beyond his own desires and needs in the service of others. Visioning presents a way of creating a more positive state that will stimulate team members to focus their energies on a higher purpose and service to others. The result is higher levels of performance and individual growth for team members. ♦

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