The Skill of Aligning Vision, Mission, and Goals
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SKILL DEFINITION

Able to define the core purpose (vision) of organization based on shared values, unit competencies, what is achievable, and what is important to customers. Provides strategic direction through building a clear sense of mission and "the business we are in," that will operationalize the vision. Able to facilitate (ideally with key stakeholders) the joint development of the vision and clarify how the day to day activities and strategic plan for achieving the Mission will tie to it. Able to work with people to resolve any apparent incompatibilities between vision, mission and goals for all operations. Seeks to bring out the shared values of team members, and support them in aligning these behind a vision, mission, strategies and goals for success. Skilled at using the mission and vision definition to continually focus energy and effort on the key success factors for the enterprise. Sees that this is well understood by all business unit members.

PRACTICE ACTIVITIES

We recommend that you scan through this list and choose as many activities to support your skill development that you can honestly adapt to your situation and commit to try. This may be all, or one.

1. Do you have a vision that is clear about the future for your organization? Great visions are inspiring to the business unit's or organization members' commitment and energy. They are based on core purpose and on values. In order to manage this well, you need to be able to talk about the future easily and be well-read, especially outside of your industry (refer to SKL units on Strategist Role and Scanning the Environment). Make certain that if your personal vision is different from that of your organization's, that you align yourself behind the organization's or you should check on your real level of commitment to your work there.

2. Check out your mission statement. Does it take less than three minutes to explain it clearly to an audience? Make sure it is simple, compelling and capable of capturing the imagination and energy of your organization, and all of its stakeholders. Does it signal what is most critical and what's going to be rewarded and what is not? Will it support everyone's decisions about best use of time, energy and skill? It is about telling the world where your organization is going. The objectives, strategies and goals will explain how you are going to get there.
3. Make sure that the whole organization and the executive team, including all staff and your direct reports, are aware of the organization's envisioned future (Vision) and Core Purpose or Reason for Being. This is not a goal or business strategy. The organization's Mission (should "operationalize" the Vision). Strategies and Goals should all directly support the Vision and have a sense of "direction" to them. Usually there is a disconnect somewhere in cascading down the communication of how these align throughout the organization. Select a person who will champion the process of cascading this down so that every employee's goals are directly related to fulfillment of strategies which are related to the Mission, which is related directly to the Vision. He or she works to ensure that each department will create goals and action plans that support the Vision and Mission agreed upon by the Board and Executive Team.

4. Most companies have a well-defined strategy that is intended to align the actions of all individuals, teams, and business units to achieve corporate goals. But when it comes time to execute, they can run into trouble. To close the gap between strategy and execution, companies need to align business strategy with actual initiatives, projects, and daily activities across the organization. There is business software to support this, but inquiring into whether it is happening or not goes a long way in smaller organizations.

5. Hold a work unit meeting to interpret the corporate or divisional mission/vision and discuss how your unit contributes to its achievement.

6. Review the mission/vision when setting goals, or making decisions, or recognizing accomplishments of the group.

7. Updating people on progress on goals relative to the Vision and Mission is critical. Goals must be visible and repeated to keep the commitment alive. Besides scheduled meetings, goals may be touted in: monthly email messages, company newsletters, bulletin boards, and "surprise" coffee breaks, among others.

8. Reward and recognize those leaders and business units that have clearly made viable progress on the agreed-upon goals.

9. Support all of the practices and actions that are in alignment with your organization's mission.

10. Review all actions that are not in alignment with the mission and cut these where appropriate. Expect all of your associates and direct reports to do the same.

11. Hold a planning session for clarity on the mission/vision at the beginning of each project and look at how the project mission directly supports the mission of your organization.

12. Make certain that the mission/vision statement is prominently displayed in all areas of your workspace.
13. Discuss the mission, strategies, and current initiatives regularly with your boss. Repeat these back to her/him to make sure that the communication is 100% aligned.

14. Develop sources of information about changes within the division that may affect how work will be done in your department or section (grapevine, email, texts, newsletter, formal communications).

15. Periodically list the "core" values, skills and abilities that define high performance in your professional area – think about changing technological demands, ability to get information, ethics of sharing information, confidentiality, ability to cooperate with other teams. Do these continue to support the mission?

16. Schedule a discussion at your project/program meetings about the mission and vision of your organization.

17. Find a time and situation to present your (business unit's/team's) vision for the organization to a gathering of members. Be willing to do this multiple times in multiple settings (see SKL unit on Speaking/Presenting).

18. Make reference to your organization's values and Mission, as well as its objectives and goals in your presentations and communications to other organizations.

19. Get feedback from your supervisor on the alignment of your vision of the work, your strategies, and your goals and expectations with hers/his. Begin this session with inquiry to find out your Supervisor's sense of this first, and then present how you see your team's vision, mission, and goals as directly aligned. Get feedback on how to bring these even more closely together from your Supervisor, or brainstorm how the differences could be advantageous.

20. Pass around articles from current periodicals that indicate key influences in the business, or suggest strategies, and allow time during your team meetings to discuss key points. Dialogue with your team on what you need to be doing relative to your vision, mission and current goals given this new contextual information or stakeholder feedback.

21. Take the lead in the preparation of plans that enable the organization to approximate their vision as closely as possible, and to get closer and closer to it over time.

TRAINING PROGRAMS

   This interactive web-based one-page planning system is an elegant, simple communication tool
for strategic planning for a whole company, business unit, or single individual, that covers Vision, Mission, Objectives, Strategies, Goals, and Action-Planning. A CEO or supervisor is able to see where everyone is progressing in a simple click by accessing progress reports and score cards online. Great for putting strategy into action.

   Our work with building shared vision, mission, objectives, strategies, and goals has been successfully used with teams, boards, and whole organizations.

3. American Management Association offers a wide variety of seminars, both on-site and classroom, (877) 566-9441. www.amanet.org
   Learn basic skills required to generate shared visioning and to development agreement and alignment between mission and vision.

   An inspirational training film with Lance Armstrong outlining the importance of goals, tactics, teamwork and leadership.

   Offers supportive documents for strategic planning and aligning your short-term decisions with your long-term goals.

   www.trainingabc.com/Focus-Your-Vision-p-16228.html
   Teaches how to find direction and purpose by combining energy and passion.
   Demonstrates that having a positive vision of the future is the most forceful motivator for success that companies, schools, communities, nations and individuals can have.


**PERSONAL DEVELOPMENT**

1. Announce your business unit's mission to friends and family members. Discuss what they are doing in their work life and if they have a defined mission statement. If so, what processes have they used to achieve alignment behind their mission statement? Are there any strategic ideas from which you might be able to learn?

2. Frame a personal mission statement for yourself. This can be done on a daily, monthly or yearly basis. Take your personal values, vision for your life, what you care about the most and attempt to 'operationalize' this into what you should
be accomplishing at this point in your life. This is your mission. Take this one step further and articulate short and longer-term goals that will be steps to accomplishing your mission. Translate these goals into weekly action plans.

3. Think of your own exercise plan as a "mission." What are your objectives and goals? What are your strategies to ensure that you achieve these? What possible support do you need to ensure completion? Do you have an action plan on a weekly basis?

4. Learn to identify opportunities for shared leadership through getting consensus behind a vision and mission for any organization to which you belong outside of work. Make sure that the sharing of values and the purpose of the organization comes first. Then question whether the vision and mission are really compelling and motivating to all stakeholders. Work with the group to come up with objectives, strategies and goals. Develop action plans to implement the new goals together. How can you help support this?

5. Lead or support the preparation of plans and ability to measure success of the achievement of goals for any organization to which you belong. Make sure that the goals and action plans approximate their vision as closely as possible, and to get closer and closer to it over time.

SUGGESTED READING


This is our favorite model for working with Vision, Mission and Goals.

Case studies of companies that worked on shared vision, mission, and goals.

Covey starts with values and vision and moves this to actions. This book applies The Seven Habits of Highly Effective People to the daily problems of implementation in a world with ever increasing demands of work and home life. Emphasizes effectiveness through looking at
overcoming habits, putting people ahead of schedules, spending time on what's really important, and keeping centered.

Supports getting past resistance to goal-setting.

Executive Thinking stands alone as the book that shows how every executive, manager, supervisor, and leader today can establish alignment, achieve stability and consistency, and take his or her career and organization to places never thought possible. Following the path of such innovative corporate leaders as Federal Express, Hewlett-Packard, Disney, and IBM, Kossoff's Executive Thinking system shows what it takes to create the processes and procedures that promote critical thinking in every employee, that help executives fulfill their role as the creator and communicator of dreams, and that make satisfaction, creativity, and success standard operating procedures for the vanguard companies of tomorrow.

Presents a step-by-step method for developing your organizational vision. It teaches how to build and maintain a shared vision directed from the top down, but encompassing the views of all the members and stakeholders, and understanding the competitive environment of the organization.


Great new study of the power of alignment and its effect on organizations.


OTHER RESOURCES

WEBSITES

1. www.onepagebusinessplan.com
The leading web-based strategic planning system. It is also available in hard-
Aligning Vision, Mission, and Goals

copy workbooks, and in both a for-profit and non-profit version. DFA represents this and can discuss it with you.

2. www.extension.umn.edu/catalog/item
Discusses the importance of developing a shared vision in a group, and how a facilitator can help a group do that. Includes planning meeting agendas, creating effective mission and vision statements, and setting planning agendas. Provides examples and worksheets on strategic planning. Third in a series of eight volumes on enhancing volunteers’ group facilitation techniques. The series may be ordered under PC-7437. For nonprofit groups, organizations, and communities who want to provide training and resources to its volunteer facilitators.

Business Cases

www.hbsp.harvard.edu
Points to importance of shared vision and mutual development of goals. Case documents a task force assigned to come up with new strategic plans and directions.

Video Insights

These clips vary in length and how they will support your skill building. We recommend trying them all at least once.

1. "How to Write Values Statements"
www.youtube.com/watch?v=NCDlozomQiY&feature
A Values Statement is used to explain what your organization stands for.

2. "How to Write Vision Statements"
www.youtube.com/watch?v=ioY-YSOKBtY&feature

3. "How to Write a Mission Statement"
www.youtube.com/watch?v=XtyCt83JLNY&feature
Erica Olsen, VP of Marketing for M3 Planning, details what your mission statement is supposed to do and how to build one that will inspire and guide your organization.

4. "Choosing Your Strategic Objectives"
www.youtube.com/watch?v=inBaHOPZReq&feature

5. "How to Set Smart Goals"
www.youtube.com/watch?v=uThBb3kGf4k&feature

6. "SWOT Analysis: How to Perform One for Your Organization"
www.youtube.com/watch?v=GNXYI10Po6A&feature
7. "SWOT Analysis in 1 Minute: Strengths Weaknesses, Opportunities, Threats"
www.youtube.com/watch?v=mH1Eljfxp-0&feature

8. "How to Develop Action Plans for Your Business Goals"
www.youtube.com/watch?v=7cm3_UJGV2Q&feature

http://www.youtube.com/watch?v=PHhmK8tbgrk&list=PLA7F0012C0F56F5E9&index

http://www.youtube.com/watch?v=ioYSOKBtY

11. "How to Write a Mission Statement,"
http://www.youtube.com/watch?v=XtyCt83JLNY&list

12. "Choosing Your Strategic Objectives,"
http://www.youtube.com/watch?v=inBaHOPZREQ&list

13. How to Develop Action Plans for Your Business Goals,
http://www.youtube.com/watch?v=7cm3_UJGV2Q&list

14. "Setting Goals and Objectives,"
http://www.youtube.com/watch?v=aJY0al1MASo&list

QUICK TIPS FOR STRATEGIC ALIGNMENT

Plan and Process

According to our best practices experts, an organization's strategic plan should:

- Be ongoing and never ending,
- Represent a shared vision of where the business is headed and what is needed to get there,
- Be integrated into a continuous business cycle, and
- The process should take place off-site, away from telephones, faxes, etc., so that team members can "disengage" from day-to-day operations.

The Planning Team

- Should represent a broad spectrum of segments within the organization chosen based on merit, not rank or entitlement.
- Ideal size is 9 to 15 members with an outside facilitator.
The CEO or the organization's leader must serve as the strategic plan's leader. Yet this individual must be sure to get input from all levels of the organization.

Best Practices

- Practice creative thinking. Generate as many ideas as possible during the early, "out-of-the-box" mode.
- Take a critical, unbiased look at what has worked before and what hasn't.
- Review your organization's values. Find a way of codifying these to serve as a matrix for what you want to see operative in the "shared vision of the ideal future" going forward.
- Identify the best of your past business practices and drop others that have led to costly mistakes.
- Create four to six long-term objectives or goals linked to the organization's vision and mission.
- Devise strategies to achieve these goals and objectives.
- For each objective, create specific action steps.

The Mission Statement

A mission statement describes what an organization does, what markets it serves and what it seeks to accomplish in the future. It:

- Should "operationalize" the shared vision of your desired future state.
- Describes how the business serves customers so they will underwrite its strategy.
- Serves as a guide for day-to-day operations and as the foundation for future decision-making.
- Builds commitment, loyalty and motivation.
- Describes the essence of the business in words all stakeholders can understand and remember.
- Focuses on specific traits and on target or niche markets.
- Should be posted on conference walls, promotional materials, and even on the packaging of products.
Aligning Vision, Mission and Goals

Goals and Objectives

Objectives set the agenda and are global in nature. Goals are more specific and short-term.

- Objectives identify areas where a major transition must occur (a transition is described as "from … to").
- Goals should be measurable, quantifiable and consistent.

Implementing the Strategic Plan

The results should be integrated with an organization's daily, weekly and monthly routines.

- The CEO or leader should develop a "corporate communication" around the plan – promoting its values, the shared vision, the mission statement, actions, etc. – and spread the word wherever possible.
- Enlist a support person (or "champion") for each strategy and action.
- Organize top and middle managers into a "strategy team" that become agents for change. The leader should receive direct reports from these teams on a regular basis.
- Avoid common implementation mistakes such as:
  (1) lack of communication throughout the company,
  (2) treating the plan as something separate and removed from the management process, and
  (3) choosing to make intuitive decisions that clash with the plan's accepted objectives.
- Set up a feedback mechanism so that employees can respond to the strategic plan.
- Share the plan with other stakeholders – investors, customers, alliance partners, etc.
- Keep the plan alive by monitoring its ongoing progress. Conduct 60 or 90-day senior management reviews. Implement objectives by expanding employee skills through training and recruitment.
- Target sales to make the link between business strategy and sales strategy.
- Reward success to increase employee motivation.
SMART Goals Redefined

*Look at your goals through the SMART lens with both sides of this table.*

<table>
<thead>
<tr>
<th>Step</th>
<th>Left Brained</th>
<th>Right-Brained</th>
</tr>
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<tbody>
<tr>
<td>1 S</td>
<td><strong>Specific and Simple</strong>&lt;br&gt;Exactly what is it that you want to achieve?</td>
<td><strong>Significant</strong>&lt;br&gt;What is the significance or meaning for you?</td>
</tr>
<tr>
<td>2 M</td>
<td><strong>Measurable</strong>&lt;br&gt;How will you measure progress and success?</td>
<td><strong>Meaningful</strong>&lt;br&gt;Why does this matter? How will it change your life?</td>
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<td>3 A</td>
<td><strong>Agreed upon</strong>&lt;br&gt;Are these aligned with other commitments? Do you have the support you need?</td>
<td><strong>Acceptable</strong>&lt;br&gt;Is this congruent with your values?</td>
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<tr>
<td>4 R</td>
<td><strong>Realistic</strong>&lt;br&gt;Can you achieve them? Is it a stretch, but not too far?</td>
<td><strong>Relevant</strong>&lt;br&gt;Will these goals make a difference? Do they matter? Are they consistent with your larger goals?</td>
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<td>5 T</td>
<td><strong>Time-bound</strong>&lt;br&gt;By when?</td>
<td><strong>Tangible</strong>&lt;br&gt;What will it look like and feel like to achieve these goals?</td>
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"*When there is no vision, people perish.*"  
*Ralph Waldo Emerson*

"*It is always wise to look ahead, but difficult to look farther than you can see.*"  
*Winston Churchill*
"Many of the great strategies are simply great visions. And great visions can be a lot more inspirational and effective than the most carefully constructed plan. Only when we recognize our fantasies can we begin to appreciate the wonders of reality."

Henry Mintzberg

"Failures don't plan to fail; they fail to plan."

Harvey Mackay