

This pack provides you with the steps and additional information to help create a compelling vision with your team. This document includes:

- What is a vision - and why do we need one?
- What are the parts of a team vision?
- Vision creation workshop
 - Step 1 – Pre Meeting Tasks
 - Step 2 – Opening the Meeting
 - Step 3 – Commencing the Idea Generation
 - Step 4 – Combining the Ideas
 - Step 5 – Agreeing on an outcome
 - Step 6 – Documenting a vision
 - Step 7 – Closing the meeting
- Vision creation tips
- Sample team visions

It also includes the Team vision worksheet that should be distributed to the team and completed before starting the workshop.

What is a vision and why do we need one?

A vision is a simple, emotionally compelling statement of where you want to be. It should inspire and motivate you, your team or your business towards a higher level of performance. An effective vision ensures activities are focussed on what needs to be done in order to achieve your ultimate objective.

A clearly defined vision creates a meaningful purpose for the team and purpose is proven to be a powerful motivator. It will engage the team member and enable the team to create goals and action plans which are relevant and aligned, because they are dedicated at achieving the vision.

What are the parts of a team vision?

The vision should clearly state the purpose of the team, include the team's values and provide a clear picture of the future. It could include statements for each of the priority performance areas such as:

Staff experience	What would make team members look forward to coming to work each day and giving their best for the team and the organisation?
Customer experience	What do customers expect from our team? What constitutes great service? What do we want customers telling others about what it is like to deal with our team?
Operational effectiveness	These are quantitative statements that explain how the team's outputs contribute to the overall organisational vision. They may involve revenue, costs, quality, timeliness, productivity, absenteeism, team member turnover, responsiveness etc.

Alternatively, the team may create one all-encompassing team vision that could be linked to all of the above priority performance areas.

Vision creation workshop

Leaders need to ensure that all team members are given the opportunity to participate in an interactive, free-flowing workshop that will define or validate the team’s vision for the future. The Leader should set up the meeting area to ensure team members are comfortable and have access to water. The meeting room should contain a whiteboard or flip chart and associated markers to ensure that all ideas are captured and recorded.

Step 1: Pre-meeting tasks

Team members should be advised of the intention to conduct a visioning workshop, the date, time and location of the workshop and be provided with the Team vision worksheet at least 48 hours before the meeting. Encourage everyone to complete the worksheet and bring it with them to the workshop. The availability of the meeting room and the required support materials (whiteboard, flip charts, markers etc.) is confirmed.

Step 2: Opening the meeting

The meeting is opened by welcoming team members and explaining the purpose of the meeting and the process to be followed. You may need to explain what a vision is, why it is important and why you are seeking the support of the team members.

Step 3: Commencing the idea generation

The meeting should be conducted as a free flowing idea generation meeting where you note and record the ideas/suggestions from team members on the flip chart/whiteboard. All team members should be encouraged to participate and questions may be directed to those team members that appear to be reluctant to offer suggestions/comments.

Explain to the team that you intend to review each of the questions asked in the Team vision worksheet to identify the most common attributes/qualities amongst the team. Each team member is asked think about their responses as if they were a member of the particular stakeholder group to be discussed today.

Commence the discussion by selecting one of the attributes/qualities (e.g. professional) that is listed on the Team vision worksheet for the question “If you were to overhear our customers talking about their interactions with our team, what would you like them to be saying?”

The group is then asked to indicate how many chose this particular attribute. This process is continued by asking individual team members what attribute they had selected and how many other team member had selected these characteristics.

Once all suggestions have been recorded, you summarise the suggestions and identify the most common attributes and seeks agreement from the team on the top 3 attributes.

Repeat this process for the next 2 questions.

For tips on how to prompt the team to participate read the resource ‘Effective brainstorming’ in Skills Centre.

Team vision worksheet

In preparation for the team vision workshop please complete the following worksheet. It will help you determine the attributes and qualities you would like associated with your team.

Pick three words from the list provided that best reflect your thoughts in relation to each of the questions below. Feel free to add your own words if they do not appear on the list.

If you were to overhear our customers talking about their interactions with our team, what would you like them to be saying?

What would you like our manager to be saying if he/she was directing our team to further development of the CSD?

What would you like your fellow team members to be saying about your team if they were speaking to their families and friends?

Ambitious	Accessible	Accountable	Ambitious
Amiable	Adapted	Appreciative	Assertive
Anal	Assertive	Communicative	Confident
Creative	Compassionate	Customer Focused	Dedicated
Cooperative	Cooperative	Critical	Empathetic
Dynamic	Efficient	Efficient	Energetic
Customer centred	Fair	Flexible	Friendly
Happy	Intuitive	Hardy	Imaginative
Inspiring	Innovative	Logical	Logical
Logical	Relaxed	Organised	Organised
Professional	Professional	Positive	Practical
Proactive	Professional	Profound	Profound
Relaxed	Relaxed	Respected	Respected
Responsible	Powerful	Risk Minded	Sense of Humour
Serious	Social	Stimulating	Strong
Successful	Supportive	Take Charge	Talented
Trustworthy	Understanding	Visible	Wound Care

Page 3 of 5
 yourbusinessnetwork.com.au

Step 4: Combining the ideas

Explain to the team members that the key attributes/qualities identified by the group will now form the basis of their vision for the team. Explain that the vision may take the form of a number of key sentences that articulate the customer experience, the team member experience and the operational effectiveness of the group, or it may be a single sentence that encapsulates all the key attributes identified. It may even take the form of a single word that is an acronym of the key attributes. Input is sought from the team members to determine the preferred method of combining the identified attributes/qualities. Once agreement is reached on the preferred method, you should encourage the team members to combine the identified attributes/qualities into the preferred form.

Step 5: Agreeing on an outcome

Following an appropriate amount of time, if agreement is not able to be reached, you may want to conduct a poll and allow team members to vote on the short list of suggestions. This outcome is confirmed and you seek the commitment of all team members to the agreed vision statement.

Step 6: Documenting the vision

With the assistance of the team, you should document the outcomes of the discussion and ensure it is filed in a readily accessible location so that the major points of discussion/agreement and the vision are available for future research, reference and review. The summary document may also be included as part of any induction program for new team members.

Step 7: Closing the meeting

You may take the opportunity to reinforce what a vision is, why it is important and what the team has agreed to as its vision for the future. Close the meeting by thanking all team members for their contribution and reiterate that the vision is about the team and that a team working towards an agreed vision will achieve significantly better and more efficient outcomes than a group of individuals.

Vision creation tips

- **Inspiration:** your vision should motivate and engage you, your team and your employees; the vision 'sells' your ultimate objective, and gets everyone pulling in the same direction.
- **Aspiration:** It should set the bar high, representing a utopia that you might never reach – but just by striving towards it you'll make continual improvements.
- **Passion and energy:** it must be able to drive you and your people through the tough times along your journey.
- **Action-oriented (not too ethereal):** without some sort of action your vision is just a dream.
- **Memorable:** make it short (15 words), simple and punchy so everyone can learn it by heart.
- **By the people, for the people:** ensure your team has input into the vision's creation along the way, so that they have a closer affinity with it; ask them to suggest words that best describe what outcome they want in the future.
- **Future-proof:** Keep it broad enough to allow your objectives to grow and evolve as your skills, team or business do.
- **Live it:** Ensure you and your team reinforce the vision by referring to it regularly, and that you 'walk the talk' – use the vision to drive performance.
- **Shout about it:** Display your vision prominently and refer to it often, so that as many people as possible hear, see and think it.
- **Get others involved:** this is most important when creating a team vision – get all team members involved so that they feel connected to the vision.

Sample team visions

"We want to be a happy, focused and successful team achieving our weekly targets whilst providing customer service excellence."

"Delivering Performance for our Customers through our People."

"To be a motivated, enthusiastic team providing the perfect customer experience"

"To be the Best of the Best! To offer Customers the Best Service and the Best Product for their needs, in the Best possible time."

"Give our customers our professional best to ensure we meet – and exceed – their needs."

"We go that extra mile to give our customers that extra smile."

"A stress free, happy team that achieves results by supporting each other, caring about our customers and by doing the right thing."

"The friendliest store in the Sydney CBD."

"The first company our customers think about when they need financial advice."

"By following up on all our leads we will aim to meet customer needs and also achieve our sales targets."

"Our business name and telephone number on every customer's refrigerator."

"In this team everyone is respected, rewarded and supported. We will know our customers by name, understand their needs, and get our processing right first time so we never have to re-work."

"We will support and coach each other to get the job done. We will be professional, polite and courteous and remember to thank our customers for their business."

"We will meet our service level agreements for our internal customers every single day."

"Passion for caring – achieving the extraordinary."

Team vision worksheet

In preparation for the team vision workshop please complete the following worksheet. It will help you discover the attributes and qualities you would like associated with your team.

Pick three words from the list provided that best reflect your thoughts in relation to each of the questions below. Feel free to add your own words if they do not appear on the list.

If you were to overhear our customers talking about their interactions with our team, what would you like them to be saying?

What would you like our manager to be saying if he/she was describing our team to his/her colleagues or the CEO?

What would you like your fellow team members to be saying about your team if they were describing it to their families and friends?

A Listener	Accessible	Accountable	Ambitious
Amiable	Analytical	Approachable	Assertive
Best Service	Coach	Communicative	Constructive
Creative	Credible	Customer Focused	Dedicated
Dependable	Determined	Devoted	Diplomatic
Dynamic	Effective	Efficient	Energetic
Experienced	Faithful	Flexible	Friendly
Happy	Harmonious	Helpful	Imaginative
Inspiring	Inventive	Leader	Learned
Loyal	Motivated	Obliging	Organised
Personal	Persuasive	Positive	Practicable
Productive	Professional	Proficient	Profitable
Reliable	Resolute	Respected	Respectful
Responsible	Rewarding	Role Model	Sense of Humour
Sincere	Steadfast	Stimulating	Strong
Successful	Supportive	Take Charge	Tolerable
Trustworthy	Understanding	Valuable	World Class