

HOW TO WRITE A VISION-BASED STRATEGIC PLAN

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Several years ago I was serving as strategic planning counsel to a Christian denomination. As part of my vision “audit,” I asked one of the denomination’s executives, “Can you tell me what the vision of the denomination is?” He paused for a moment, nervously scrambling through his mental filing cabinet, and then with a look of annoyed perplexity said, “Where did I put that thing?!” It was, as they say, a teachable moment.

The executive’s response, while more humorous (as in tragic comedy) than many I encounter, was priceless. It pointed to the widespread confusion about vision and the crucial difference between vision and vision statements. Because of the seemingly irresistible impulse many organizations have to jump on the bandwagon of current management fads, such as writing vision statements, I’ve come to the conclusion that if there is a correlation between true vision and having in your possession a vision statement, that correlation is probably inverse. That is, true visionaries are often too busy making their vision reality to write it down, and those who have written vision statements often don’t have what would qualify as true visions.

Vision: The Force that Invents the Future

Before we go any further, let’s eliminate some of the mental fog that has resulted from managers using “mission” and “vision” as near synonyms. First, mission is a statement of purpose. It answers the question, Why does this organization (or division, department, office, etc.) exist? Vision is a statement of direction. It answers the question, Where are we headed as an organization? It has been my experience for many years working with hundreds of ministries that organizations and their leaders can be clear on why they exist while being understandably confused about where they are headed (somewhat akin to being all dressed up with no place to go!).

Therefore, when I was asked to write this article, my immediate reaction was that how to write a vision-based strategic plan is secondary to where to write the vision. Because vision is a “see” word – just as calling is a “hear” word – if you can’t see the vision you can’t be it. I can usually tell whether an organization has a vision by asking people in the organization, not just senior executives, to share their vision with me. If people describe in their own words with obvious passion the picture or image that is emblazoned in their hearts and minds, then I know that the organization has a vision. If they have to look for a document or try to recite some written statement with an obvious lack of passion, I know that I (and organizational staff) have our work cut out for us.

“Visions are detected, not created”

That points us to truth number one: Organizational visions, like personal visions, are not “created.” They are “detected.” They are detected or discovered through a prayerful, careful, and typically rigorous process of discernment which wrestles with a sense of calling, core values, mission, core competencies, and how these align with the world’s needs. They’re not simply (and uselessly) concocted in a weekend retreat like some vision “statements” are. They take months of deep prayer, introspection, analysis and dialogue before the vision takes shape.

“I will put my law in their minds and write it on their hearts. I will be their God, and they will be my people.” Jeremiah 31.33b

Truth number two: Until your vision becomes a compelling mental image or picture that captivates the true yearnings, aspirations, and hopes of those in the organization — and until it is written (or more appropriately “painted”) on minds and hearts — putting it on paper will have little value. The power lies in the picture (image, metaphor, etc. with their underlying values), not the “propositions.” A significant body of research gives growing credibility to the “heliotropic hypothesis.” Just as plants and flowers grow in the direction of the sun, so do organizations (and even societies) develop most quickly in the direction of bright, powerful, attractive images.

Let’s assume for the sake of what follows that you will not commit the error of attempting to write a vision statement without first having a compelling vision (an “All hat and no cattle” scenario, as they say in Texas). At this point, we’re ready for truth number three: Vision, without organizational alignment, is simply a wish list. Don’t misunderstand. After decades of research, experience and observation, I’m persuaded that from a human perspective, there is no force that is more potent in the growth, transformation, or performance of an organization than a compelling vision widely shared. But it is folly to think that vision alone will transform an organization. Until the vision achieves alignment in the organization’s strategies, structures, systems, core competencies, culture, and colleagues, “visionary” leadership is likely to remain little more than “hallucinatory.”

The Main Thing is to Keep the Main Thing the Main Thing

Because the focus of this article is how to write a vision-based plan once you have true vision, here are some ultra-brief guidelines:

Key Result Areas and Key Performance Indicators: The mere existence of a vision suggests a gap between where the organization is now and where it wishes to be in the future. A “gap analysis” in strategic planning attempts to evaluate this gap critically. Critical thinking should not reveal dozens of areas but rather those key result areas (KRAs) – human resources, finances, physical plant, donor development, etc. – where the organization must perform to be successful. Once identified, key performance indicators (KPIs) must be established to provide the metrics or measurements needed in each KRA to know if you’re making headway on translating the vision into reality. Truth number four is the inspection principle: You get what you inspect, not what you expect (what gets measured gets done).

ABCs: Just as I am persuaded that there is often an inverse correlation between the existence of a vision statement and true vision, I am likewise persuaded that the utility and value of a plan is inversely proportionate to its length. Shorter is better. (A Harvard professor once described a student’s theme as “A vast army of words, marching overland in search of an idea.” Many plans fall into the same trap.) Therefore, shoot for the ABCs: accuracy, brevity, and clarity. If you can’t succinctly outline key goals and initiatives onto a couple of pages – often in bullets and without narrative – you’re not yet clear enough on your focus and real priorities. If you need to embellish or elaborate on portions of a plan, put it in the appendix, not in the main body where more words will only obscure focus.

Contents: Hundreds of books will give you outlines for the contents of a plan. Here are the ones that are important to me:

- I. Mission (why we’re here)
- II. Core Values (what’s really important to us)
- III. Vision (where we’re headed)

- IV. Strategy (how we're going to get there)
- V. Key Result Areas (the areas in which we must perform)
- VI. Key Performance Indicators (the measures we'll use to see if we're really performing)
- VII. Improvement Targets (specific objectives linked to baseline KPIs)
- VIII. Recognition and Rewards (how we will encourage performance)
- IX. Timeline (how long is it going to take)
- X. Budget (what's it going to cost)

In conclusion, we should realize that a plan is only as good as its execution. General George Patton once said that he would rather have a decent plan violently executed than a brilliant plan feebly executed. Kaiser Wilhelm said he would rather have "pointed bullets than pointed words." Most plans have great shelf life but no real life, and that's because too many managers mistakenly believe that putting words on paper will somehow magically make things happen. Words alone rarely make things happen. Vision-inspired leaders, managers, staff and volunteers make things happen. A vision-based strategic plan is simply a helpful tool to point them in the right direction, keep them on the right track, and measure their progress along the way.