

Building A Shared Vision: Manager-led Team Session

(8 hrs over two days for full session)

Summary: Develop Shared Values, Purpose, Mission, Strategy, and Goals with your team. Your team may not need to work on all five components and may instead choose to focus only on the components your team needs most.

Desired Outcomes:

- Create a shared understanding of the values that guide how our team performs our work
- Articulate our team's purpose – why our team exists
- Discuss and agree on our team's mission statement – what we hope to achieve together in the next 1-2 years
- Develop concrete strategies, tactics and deliverables to achieve our mission

A clear mission and vision helps bring meaning to the work we do. If the members of your team think that their work matters and creates change, they will be more engaged and produce higher results. To ensure buy-in, building a vision for your team should be a collaborative effort.

As a manager, you are the guardian of your company's culture. You play a critical role in helping your team to understand how their work fits into your organization's larger purpose. Your team's vision should be aspirational, bold, have allure, and almost (but not quite!) unattainable.

Preparing for your team session

Plan on spending ~3-4 hours to prepare for your Vision Team Session. Consider asking if any of your team members would like to help facilitate a part of the session.

1. Familiarize yourself with [the components that make up a team vision](#) and the common language you can use in your discussions with your team.
2. **Make a copy** of [this slide deck](#) to prepare for your session; modify as needed.
3. **Create an online survey** of the [Values Questionnaire form](#) and send out with pre-work listed under #5 below.
4. Customize and print the [Vision Handout](#) and write in your company's values on page 1. You will fill out all other boxes as a team. Then make a copy of the handout for each person: 2-sided, color, stapled.
5. **Team Session Pre-Work:** Send pre-work instructions below to team members **1-2 weeks before the Vision Session**. Manager also completes the pre-work.

To prepare for our Vision Session, please complete the six actions below.
A. Reflect on the following "Mission" questions:

- What would you like our team to be known for?
- What do you hope our team accomplishes in the next 1-2 years?
- What is the most desirable, yet outrageous outcome our team could have in 1-2 years?

- B. Select one image from [this collection](#) that in some way represents the Mission for our team. Bring this to our session so that you can share it with our team.
- C. Complete the Values Questionnaire. Summary results will be shared at our team meeting. **(Manager Note: Insert the link to the Values Questionnaire that you create for your team.)**
- D. Bring a picture of someone whose values you deeply admire.
- E. Read the Harvard Business Review article: [The Building Blocks of Strategy](#).
- F. **[Optional]** Read the Jerry Porras and James Collins article: [Building Your Company's Vision](#).

Manager Preparation (continued):

6. Compile the Values Questionnaire responses, and insert results into [slide deck](#). Go through the entire slide deck to ensure it's customized to your company and team.
7. Write the Vision Framework on a flipchart or whiteboard and keep it visible during the session.
8. Have two flipchart easels, pads, masking tape, flipchart markers OR 3-4 whiteboards and markers in the room.
9. Have rectangle post-its for each person to use during the strategy exercise.

Agenda

Time	Day One - 6 hours
5 mins	Welcome: <ul style="list-style-type: none"> • Discuss the purpose of building a Shared Vision. • Share agenda SLIDE 3. • Ask someone to help take pictures or notes of the team's work so that it can be shared after the meeting.
5 mins	SLIDES 4-6: Review Google's vision framework & definitions <ul style="list-style-type: none"> • This creates a common language for your team to talk about vision and its components.
60 mins	Identify Our Team's Core Values: <ul style="list-style-type: none"> • SLIDE 7: Values Overview (1 min) • SLIDE 8: Show your company's values. Ask: Why did our leaders identify these values? What purpose do they serve? (3 mins) • SLIDE 9: Have each person share their picture of a person they admire and the values he/she admires in this individual. (1-2 min/person) (~10-15 total mins) • Ask them to post their pictures on the wall. • SLIDE 10: Review Values Questionnaire results. Which values received the most votes? (~3 mins) • Reach initial agreement on 5-8 values shared by the team. (~3 mins) • Come up with 2-3 behaviors that describe what each value means. "What does [value x] look

	<p>like?” For example, if ‘teamwork’ is one of the top values, what does that really mean? Let’s get clear about what behaviors we’re expecting.* (15-20 mins)</p> <ul style="list-style-type: none"> ● Gain final agreement on our 5-8 shared values. ASK: Can everyone agree on these as our team values? (~5 mins) ● SLIDE 11: Group Discussion: How will these values become part of our day-to-day work and help build our culture? (~2-5 mins) <p><i>*Manager Note: If you have a large group and/or want to save time, split them into two groups. Assign each group half of the values and identify 2-3 behaviors for each value. Give each group 10 mins, and then ask them to share with the other group. After each group shares, gain final agreement on values and key behaviors. If any wordsmithing is needed, ask for two volunteers to work on drafting the final wording and who will bring it back to the team for buy-in.</i></p>
<p>10 mins</p>	<p>BREAK</p>
<p>60 mins</p>	<p>Discuss Our Team’s Purpose</p> <ul style="list-style-type: none"> ● SLIDES 13-14: Review “Purpose” definition (2 mins) ● SLIDES 15-16: [Your company’s] Purpose Ask the team why your company was founded and see what they say. If they bring up your mission statement, ask them why that mission is so important. ● SLIDE 17: Team activity Answer the “Purpose” questions in the Vision Handout.* Capture responses for each question on flipcharts. (20-25 mins) ● Discuss all responses. Check for agreement & understanding on why your team exists. (20-30 mins) ● Post Purpose responses on the wall, and keep visible for the rest of the session. <p><i>*Manager Note: If the group is big, or you want to save time, split into two groups: One group answers #1-3; the second group answers #4-5. Share responses with the entire team. Check for agreement/understanding on why your team exists at your company.</i></p> <p><i>Reminder: Purpose is why your team exists. Mission is a goal statement about what your team wants to accomplish over the next 1-2 years.</i></p>
<p>45-60 mins</p>	<p>Pre-work Reminder: Please bring the image you selected that in some way represents the Mission you would like to have for our team. We will share these after lunch.</p> <p>Team Lunch!</p>
<p>90 mins</p>	<p>Create Our Mission Statement</p> <ul style="list-style-type: none"> ● SLIDES 19-22: Share definition of Mission & your company’s Mission (1 min) ● SLIDE 23: Personal reflection questions - give 4-5 mins for everyone to write down responses in the Vision Handout. (4-5 mins) ● SLIDE 24: Conduct image activity and share images in trios* Also share responses to the reflection questions. Record all ideas, responses on a flipchart. (5 mins/person - 15 mins) ● SLIDE 25: Have each trio share all their ideas with the entire team. (15-20 mins) ● SLIDE 26: Two Groups: Draft 1- 2 Mission Statements (15-20 mins)

	<ul style="list-style-type: none"> • Share and discuss statements with entire team. Pick one or two that the team finds most compelling and inspiring. (~20 mins) • Share proposed Mission Statement(s) with a few key stakeholders/users and ask for their feedback/input. Then finalize your Mission Statement with the team. <p><i>*Manager Note: If you have a team of 5 or less, you can do this activity together vs setting up trios.</i></p>
5 mins	<p>SLIDE 27: Summarize the day; review action items and owners; review agenda and timing for Day 2.</p>
Time	<p style="text-align: center;">Day Two - 2 hours</p>
1 hr 45 mins	<p>Prep: Have Draft Mission Statement(s) posted on wall & any other work that would be helpful to keep visible from Day One. Post Vision Framework.</p> <p>Welcome back! (5 mins)</p> <ul style="list-style-type: none"> • Review Team Values, Purpose and Draft Mission Statement(s) • Review the goal for the day: Develop key strategies to accomplish our Mission. <p>Create Strategies to Accomplish Our Mission</p> <ul style="list-style-type: none"> • SLIDES 30-33: Review strategy definitions and building blocks of strategy. (5 mins) • SLIDES 34-35: Complete internal & external assessment conversation. (Select one of the assessments in the slide deck – either answer the four strategy questions or complete a SWOT analysis with your team.) Capture responses on flipchart and post on wall. (20-30 mins) • Write four Focus Areas on a flipchart or whiteboard. (Edit titles of Focus Areas as needed.) • SLIDE 36: Generate possible strategies for each of the four Key Focus Areas. Have each person write down possible strategies on a post-it, one strategy per post-it. Post them on the Focus Area flipchart or whiteboard. (20 mins) • SLIDE 37: Team Discussion: Review & discuss all strategy ideas. (30-40 mins) <p>Take 5-10 minute BREAK</p> <ul style="list-style-type: none"> • SLIDE 39: Have each person vote on the top 3-5 strategies they think will help them accomplish your team’s Mission. (5 mins) • Identify the strategies with the most votes, and ultimately select 3-5 strategies that the team and manager feel will make the biggest impact. As their manager, you may have additional information that will help the team decide which strategies will be most effective. <p>ASK the team: Will these strategies help us achieve our Mission? (20-30 mins)</p> <ul style="list-style-type: none"> • Discuss next steps for finalizing strategies and creating goals for each strategy. Check out Google’s guide to setting goals with Objectives and Key Results (OKRs) before you do this. (5 mins) <p><i>*Manager Note: If you already have strategies and goals/OKRs developed, check them against your Mission Statement to see if they will help you accomplish it. Update strategies and goals/OKRs if needed.</i></p>

	<p>If needed after the strategy session, talk to a few stakeholders or your manager to get their input/feedback on your proposed strategies before you finalize them.</p>
10 mins	<p>SLIDE 40: Communicating Our Vision</p> <ul style="list-style-type: none">• Discuss how to document your team's values, purpose, mission, and key strategies, e.g., create slide deck, create a poster, etc.• Discuss how you want to communicate your team Vision with others.• Everyone on your team should be able to articulate their team's Mission Statement and their top strategies for the year.
	<p>SLIDE 41: Summary and next steps:</p> <ul style="list-style-type: none">• Summarize work completed.• Review Next Steps and Action Items: e.g. For each strategy, complete OKRs to define ownership, key steps, metrics. Set up quarterly strategy meetings to review progress, current business conditions, and adjust goals/OKRs as needed.• Invite the group to share feedback on the session: What went well? Any suggestions for future sessions?• Thank the team for all their hard work and contributions in helping create a Shared Vision for the team.