

Collection: Irreplaceable in the AI Era™

"Because leadership begins with you"

This is not just another ebook.
It's a practical guide for leaders who—amid the relentless advance of technology and artificial intelligence—seek to ensure that their leadership, decisions, and results remain relevant and sustainable.

It was conceived and written from a place of deep conviction—combining strategic clarity with the genuine love for positive impact, the personal power that comes from lived experience, and the essence of leading with integrity. Every concept, framework, and tool included here has been chosen with a single purpose: to deliver real value that can tangibly transform the way you lead and generate results.

Experience shows that most failed transformations don't fall short because of technical limitations, but because of invisible factors that silently erode performance: internal resistance, cultural misalignment, loss of strategic focus, or lack of team commitment. These rarely appear in the metrics—yet they determine the success or failure of any initiative.

In this guide, you'll find actionable tools and frameworks to help you:

- Identify and anticipate risks that can slow or derail your strategy.
- Protect and strengthen your leadership capacity in high-disruption environments.
- Use technology—including AI—as a multiplier of results, not as a replacement.
- Stay competitive without compromising your team's cohesion or your organization's future.

This resource is available in PDF format for quick reference. If you prefer the editable version, you'll find a link to the download center at the end, where you can get it in Word format and adapt it to your needs. A new ebook will be added to the collection every week—until all 25 are complete. Simply visit the download center to see what's new each week.

If these words have reached you, it's likely not by chance. You are in the right position, at the right time, and in the right circumstances for this information to make a real difference. And as you put it into practice, you may discover it could also spark transformation in others.

Because in today's era, real value lies not just in the technology you use—but in your ability to lead with vision, precision, and purpose.

2. Central Theme of the Ebook

2.1. Enhancing Strategic Vision in the Age of AI

The central theme of this guide is **strengthening strategic vision** so that your organization can:

1. **Set meaningful long-term goals** that integrate impact, resilience and profitability.
2. **Communicate vision in an inspiring way**, without losing clarity or realism.
3. **Align teams and stakeholders** so that daily decisions reflect the long-term direction.
4. **Measure progress toward the vision**, not only activity or isolated metrics.
5. **Adjust the vision intelligently** as the external environment evolves.

The focus is practical: turning "vision" from a framed statement on the wall into a **living compass** that guides decisions and investments.

2.2. Who This Guide Is For

This ebook is especially relevant if you:

- Sit on a **board of directors** or advisory council.
- Act as an **investor or strategic partner** in growing organizations.
- Lead a **portfolio of companies, funds or initiatives** that must navigate disruption.
- Play a role as **chair, committee lead or independent director** responsible for long-term orientation.

The language and examples assume you are familiar with governance, financial oversight and strategic planning—but they are written in a way that any senior leader can follow.

---

3. Initial Sections

3.1. Why Strategic Vision Matters Now

In relatively stable times, organizations could rely on:

- Forecasts based on past trends.
- Incremental improvements.
- A clear separation between "strategy season" and "execution season."

Today, volatility blurs those boundaries. Without a strong and flexible strategic vision:

- Teams drift into short-term firefighting.

- Investments become reactive instead of intentional.
- Talented people lose connection with a meaningful future and leave.

A robust vision does not remove uncertainty. It **anchors meaning** and provides criteria to navigate it.

3.2. Purpose of This Guide – Five Objectives

This guide has five specific objectives:

1. **Clarify concepts** related to strategic vision in simple, board-friendly language.
2. **Offer tools** to set and review long-term goals in a world that changes fast.
3. **Provide examples** that show how vision can either mobilize or paralyze an organization.
4. **Equip you with templates** to translate vision into governance, metrics and routines.
5. **Inspire a disciplined yet human approach** to leading with vision in times of disruption.

3.3. How to Use This Guide

You can use this ebook in different ways:

- **As preparation** for a strategy retreat or annual offsite.
- **As a workbook** during board sessions, using exercises and templates in real time.
- **As a reflection tool** between meetings to assess if you are truly leading with vision.
- **As a reference** when coaching CEOs or next-generation leaders.

Keep a digital or physical notebook at hand. Capture insights, agreements and open questions. The value of this guide emerges when it becomes part of your conversations and decisions.

---

4. Development of the Theme – Five Strategic Subtopics

We will explore five key subtopics:

1. Setting long-term goals.
2. Communicating vision in an inspiring way.
3. Aligning teams with the vision.
4. Measuring progress toward the vision.
5. Adjusting vision as the environment changes.

Each subtopic follows the same structure:

1. **Definition.**
2. **Practical framework.**
3. **Applied example** (marked as *hypothetical case* when appropriate).
4. **Exercise** with roles, inputs, time and deliverables.
5. **Template** with one example row + one blank row.
6. **Checklist** of key actions.
7. **Suggested KPIs.**

---

5. Subtopic 1 – Setting Long-Term Goals

5.1. Definition

Setting long-term goals means **translating vision into concrete commitments over an extended horizon** (typically 5–10 years, sometimes longer for infrastructure, education or societal change).

These goals:

- Express what success looks like, beyond short-term financials.
- Integrate financial, human, technological and environmental dimensions.
- Provide orientation for capital allocation, capability building and partnerships.

They must be *ambitious* enough to inspire and *concrete* enough to guide decisions.

5.2. Practical Framework – The 4 Horizons of Long-Term Goals

Use four horizons to structure your long-term intent:

1. **Resilience Horizon (0–3 years)**
    - Ensure continuity, solvency and basic robustness.
    - Goals focus on risk management, liquidity and core capabilities.
2. **Growth Horizon (3–5 years)**
    - Scale what works and strengthen competitive position.
    - Goals include market share, portfolio evolution and strategic alliances.
3. **Transformation Horizon (5–10 years)**
    - Redesign business models, technology stack and talent for the future.
    - Goals address AI adoption, decarbonization, new sectors or geographies.
4. **Legacy Horizon (10+ years)**
    - Define the contribution you want the organization to make to society.
    - Goals refer to impact on people, communities, ecosystems and knowledge.

For boards and investors, working across horizons prevents the trap of either **purely tactical** or **purely aspirational** goals.

5.3. Applied Example (*hypothetical case*)

A regional financial institution wants to update its long-term direction.

Using the four horizons, the board and executive team agree on:

- **Resilience (0–3 years):**
  Strengthen cybersecurity, maintain capital ratios, and ensure compliance with new regulations.

- **Growth (3–5 years):**
  Expand digital services to underbanked populations, reaching a defined number of new clients.
- **Transformation (5–10 years):**
  Integrate AI-based risk models and personalized financial guidance, shifting from "product seller" to "financial wellbeing partner."
- **Legacy (10+ years):**
  Contribute to closing the financial inclusion gap in the region and reducing household vulnerability to economic shocks.

These goals then inform investment decisions, talent strategies and partnership choices.

5.4. Exercise – Designing Your Long-Term Goal Map

Objective
Create a first version of your long-term goal map across the four horizons.

Roles

- **Board chair or lead director** – Facilitates the conversation.
- **CEO / executive leader** – Brings operational and market perspective.
- **CFO or strategy officer** – Ensures financial and risk coherence.
- **Observer or secretary** – Documents agreements and open questions.

Inputs

- Existing strategy documents and business plans.
- Risk reports and scenario analyses.
- Purpose or mission statement.

Suggested time

- 3–4 hours (can be split across sessions).

Step-by-step

1. **Clarify the time horizon (30 min)**
   Decide the relevant timeframe for your sector (5, 10, 15 years).
2. **Brainstorm desired outcomes per horizon (60 min)**
   Use post-its or digital boards. Think freely; do not filter yet.
3. **Cluster and prioritize (60 min)**
   Group similar ideas and identify 3–5 strategic goals per horizon.
4. **Stress-test the goals (60 min)**
   Ask: Are they ambitious? Coherent? Measurable at a high level?
5. **Assign owners and next steps (30 min)**
   Decide who will refine each goal with management and by when.

Deliverables

- Draft long-term goal map across four horizons.
- List of owners responsible for refinement.
- Plan for integrating goals into existing governance cycles.

5.5. Template – Long-Term Goal Map

Horizon	Strategic goal (example)	Target year	High-level indicators
Transformation	Become a regional reference in human-centered AI adoption in healthcare operations.	2032	% processes augmented by AI; clinical outcomes improved

5.6. Checklist – Long-Term Goals

- ☐ Our long-term goals cover resilience, growth, transformation and legacy.
- ☐ Each goal is formulated in accessible, non-technical language.
- ☐ We can articulate why each goal matters for stakeholders and society.
- ☐ There is at least one high-level indicator for every long-term goal.
- ☐ Responsibilities for refining and executing goals are clearly assigned.
- ☐ Board agendas integrate regular reviews of progress toward these goals.

5.7. Suggested KPIs – Long-Term Goal Setting

- Percentage of board meetings that include explicit discussion of long-term goals.
- Time between recognizing the need for updated goals and approving them.
- Degree of alignment between long-term goals and capital allocation (self-assessed or via audit).
- Executive and management understanding of long-term goals (measured through surveys).
- External perception of the organization's long-term direction (investor or stakeholder feedback).

---

6. Subtopic 2 – Communicating Vision in an Inspiring Way

6.1. Definition

Communicating vision in an inspiring way means **sharing the future you are building so that people feel both invited and responsible**.

Inspiration is not about exaggeration or empty slogans. It is about:

- Connecting the vision with real challenges and possibilities.
- Speaking to both reason and emotion.
- Using language that different audiences can recognize as their own.

6.2. Practical Framework – The V.I.S.I.O.N. Narrative

Use this six-part structure to craft and share your vision:

1. **V – View of the future**
    - Describe the world you expect or wish to see in 5–10 years.
2. **I – Issue at stake**
    - Explain what is at risk if the organization does not evolve.
3. **S – Stakeholders and stories**
    - Show how different people (clients, employees, communities) are affected.
4. **I – Intent of the organization**
    - Clarify what you commit to do and what you will not do.
5. **O – Outcomes and opportunities**
    - Paint a picture of the positive results if the vision is realized.
6. **N – Next steps today**
    - Translate the vision into tangible actions for the present.

This structure helps avoid overly abstract messages.

6.3. Applied Example (*hypothetical case*)

A board overseeing a group of education centers wants to communicate a renewed vision centered on lifelong learning and AI.

Using V.I.S.I.O.N., they craft a message that includes:

- View: A region where people of all ages can continuously learn and adapt.
- Issue: Without that, many will be excluded from new forms of work and participation.
- Stakeholders: Students, teachers, families, local businesses.

- Intent: To design learning ecosystems that combine human educators and intelligent technologies.
- Outcomes: Greater inclusion, innovation and community resilience.
- Next steps: Pilots in three centers, teacher training, and partnerships with local employers.

This narrative becomes the backbone for speeches, annual reports and investor decks.

6.4. Exercise – Building Your Vision Story

Objective
Create a clear, inspiring narrative that can be adapted to different audiences.

Roles

- **Narrative owner:** Board chair, CEO or key spokesperson.
- **Stakeholder voice:** Representative from staff, clients or communities.
- **Communication advisor:** Person skilled in writing or storytelling.

Inputs

- Long-term goals map from Subtopic 1.
- Existing mission statements, speeches or reports.
- Feedback from stakeholders about what inspires or concerns them.

Suggested time

- 3 hours for an initial version; future refinements can be shorter.

Step-by-step

1. **Draft each element of V.I.S.I.O.N. (60 min)**
   Work in small groups, then consolidate.
2. **Write a 2–3 paragraph story (40 min)**
   Combine elements into a single coherent narrative.
3. **Adapt to two audiences (40 min)**
   For example: employees and external partners; check vocabulary and emphasis.
4. **Test with a small group (40 min)**
   Ask: What did you remember? How did it make you feel? What questions arise?
5. **Refine and agree on usage (20 min)**
   Decide where and how the story will be used in the next 90 days.

Deliverables

- Vision story (short and extended versions).
- Notes from stakeholder feedback.

- Plan for integrating the story into upcoming communications.

6.5. Template – Vision Narrative Canvas

Audience (example)	Core message	Emotion to evoke	Business outcome to support	Channel / Format
Internal leaders	We are building a healthcare system where AI amplifies, not replaces, human care.	Confidence and purpose	Alignment around AI investments and pilots	Leadership summit keynote

6.6. Checklist – Inspiring Communication

- ☐ Our vision is expressed in language that non-experts understand.
- ☐ We have a consistent narrative used across channels and leaders.
- ☐ The vision connects to real stories of clients, employees or communities.
- ☐ We balance ambition with transparency about risks and challenges.
- ☐ People know what the vision means for them in practical terms.
- ☐ The board periodically reviews whether communication still feels authentic.

6.7. Suggested KPIs – Vision Communication

- Employee understanding of vision (survey results).
- Stakeholder recall of key messages after events.
- Engagement metrics for communications that include the vision story (open rates, participation).
- Number of leaders beyond the CEO who can confidently share the vision.
- Instances where vision is cited in decision-making (minutes, reports).

---

7. Subtopic 3 – Aligning Teams with the Vision

7.1. Definition

Aligning teams with the vision means **ensuring that structures, incentives, processes and daily behaviors are consistent with the desired future**.

It requires moving beyond posters and slogans to:

- Clear cascades of objectives.
- Governance mechanisms that reinforce alignment.
- Space for dialogue and sense-making across levels.

7.2. Practical Framework – The A.L.I.G.N. Model

Use the A.L.I.G.N. model to connect vision with operations:

1. **A – Articulate roles in the vision**
    - Clarify how each function or unit contributes.
2. **L – Link objectives and rewards**
    - Align KPIs and incentives with strategic goals, not only short-term numbers.
3. **I – Integrate decision forums**
    - Ensure that committees, councils and routines support the vision.
4. **G – Grow capabilities**
    - Develop skills, mindsets and tools needed to live the vision.
5. **N – Nurture culture**
    - Encourage behaviors and stories that embody the future you want.

7.3. Applied Example (*hypothetical case*)

An impact investment fund wants all portfolio companies to integrate social and environmental metrics into their strategy.

To align teams:

- Articulate: Each investment officer maps how their deals contribute to the fund's long-term impact thesis.
- Link: Part of variable compensation depends on sustained impact performance, not only financial returns.
- Integrate: Investment committees include a mandatory conversation on impact risk.
- Grow: Training is offered on impact measurement and stakeholder engagement.
- Nurture: Stories of portfolio companies that successfully integrate impact into operations are regularly shared.

Alignment becomes visible in both processes and narratives.

7.4. Exercise – Vision Alignment Map

Objective
Identify alignment gaps between the strategic vision and current organizational reality.

Roles

- **Board or committee leads** – Bring governance perspective.
- **Executive team** – Represent operational reality.
- **HR / people lead** – Contributes culture and talent insights.

Inputs

- Vision narrative and long-term goals.
- Current organizational charts, governance structures and KPI sets.
- Recent employee or stakeholder surveys, if available.

Suggested time

- 3–4 hours, ideally in a joint workshop.

Step-by-step

1. **List key units or functions (30 min)**
   Include core business, enabling functions and critical committees.
2. **For each, describe current contribution to the vision (60 min)**
   Use the template below to capture alignment.
3. **Identify misalignments and missing links (60 min)**
   Where is the vision not reflected in objectives, incentives or decisions?
4. **Prioritize 3–5 alignment actions (50 min)**
   Examples: update scorecards, redesign committee charters, adjust budgets.
5. **Assign owners and timeframes (20 min)**
   Integrate actions into existing planning cycles.

Deliverables

- Alignment map.
- List of prioritized alignment actions.
- Ownership and timeline for each action.

7.5. Template – Vision Alignment Table

Unit / Function (example)	Part of the vision it supports	Current practices	Alignment level (1–5)	Priority action
Digital transformation	Become a data-informed	Running pilots in isolated areas;	3	Create cross-functional

Unit / Function (example)	Part of the vision it supports	Current practices	Alignment level (1–5)	Priority action
	organization that uses AI responsibly.	limited governance.		AI steering committee.

7.6. Checklist – Aligning Teams

- ☐ Every major unit can explain its role in the long-term vision.
- ☐ Strategy, budgeting and people processes reflect the same priorities.
- ☐ Governance forums explicitly test decisions against the vision.
- ☐ Capabilities needed for the vision are built intentionally, not by chance.
- ☐ Stories and recognition mechanisms highlight behaviors aligned with the future.
- ☐ The board regularly asks management where alignment is strong or weak.

7.7. Suggested KPIs – Alignment

- Percentage of units with objectives explicitly tied to long-term goals.
- Alignment score from internal surveys (“I see how my work contributes to the vision”).
- Number of governance decisions where vision considerations influence outcomes.
- Investment in capability-building directly related to strategic priorities.
- Turnover rates in critical roles tied to the future vision.

---

8. Subtopic 4 – Measuring Progress Toward the Vision

8.1. Definition

Measuring progress toward the vision means **creating a set of indicators, signals and stories that show whether you are moving in the desired direction**.

Traditional metrics (revenue, cost, EBITDA) remain important, but they are not enough. Boards need **multi-dimensional dashboards** that include:

- Client and stakeholder outcomes.
- People and culture.
- Innovation and learning.
- Environmental or social impact where relevant.

8.2. Practical Framework – The 4 Dimensions Dashboard

Organize your indicators in four dimensions:

1. **Value Creation**
    - Financial health, growth, portfolio performance.
2. **Value Experience**
    - How clients, users and communities experience the organization.
3. **Value Enablers**
    - Capabilities, technology, talent and culture that make success sustainable.
4. **Value Impact**
    - Broader effects on society and the environment, positive or negative.

For each long-term goal, choose indicators across these dimensions.

8.3. Applied Example (*hypothetical case*)

A board overseeing a group of clinics defines a long-term vision of "accessible, humane healthcare supported by intelligent systems."

Their 4 Dimensions Dashboard includes:

- Value Creation: margin per service line, investment capacity.
- Value Experience: patient satisfaction, waiting times, complaint resolution.
- Value Enablers: percentage of staff trained in AI-supported tools, burnout indicators.
- Value Impact: reduction in avoidable hospitalizations in vulnerable communities.

The board receives quarterly reports that connect these indicators to the vision, not just to annual targets.

8.4. Exercise – Building Your Vision Dashboard

Objective
Define a first version of the dashboard that will allow the board to monitor progress toward the vision.

Roles

- **Board committee leads** – Especially audit, risk and strategy.
- **CFO / performance lead** – Provides existing metrics.
- **Impact or sustainability lead (if applicable)** – Brings broader impact perspective.

Inputs

- Long-term goals and key strategic initiatives.
- Current dashboards and reports.
- Stakeholder expectations (regulators, investors, communities).

Suggested time

- 3 hours.

Step-by-step

1. **Map current metrics to the four dimensions (45 min)**
   Identify concentration and gaps.
2. **Propose new or adjusted indicators (60 min)**
   Ensure each long-term goal has at least one indicator per relevant dimension.
3. **Define data sources and responsibilities (45 min)**
   Clarify where information comes from and who owns it.
4. **Design a simple dashboard format (30 min)**
   One slide or page per goal, visible at board level.
5. **Plan pilot and review cycle (30 min)**
   Decide when to test the dashboard and how to refine it after the first cycles.

Deliverables

- Draft vision dashboard.
- Indicator definitions and owners.
- Plan for implementation and review.

8.5. Template – Vision Dashboard (Sample Entry)

Outcome area (example)	KPI	Target 2028	Current value	Trend (↑/↓/→)	Owner
Value Experience	% of clients who say "our provider is future-ready"	70%	38%	↑	Chief Strategy

8.6. Checklist – Measuring Progress

- ☐ Our dashboard links directly to long-term goals and vision narratives.
- ☐ We balance financial, human, innovation and impact indicators.
- ☐ Data sources and responsibilities are clearly defined.
- ☐ The board understands the story behind each metric, not only the number.
- ☐ We review trends over time, not only single data points.
- ☐ We adjust initiatives and investments based on what the dashboard reveals.

8.7. Suggested KPIs – Progress Measurement

- Percentage of long-term goals with defined indicators across the four dimensions.
- Timeliness and completeness of data delivered to the board.
- Board satisfaction with quality of information (self-assessment).
- Number of strategic decisions explicitly informed by dashboard insights.
- Reduction of blind spots discovered after the fact (e.g., crises that were not anticipated).

---

9. Subtopic 5 – Adjusting Vision as the Environment Changes

9.1. Definition

Adjusting vision according to changes in the environment means **keeping the vision stable enough to provide direction yet flexible enough to remain relevant**.

It requires:

- Continuous scanning of external signals.
- Courage to question assumptions.
- Governance processes to update direction without causing chaos.

9.2. Practical Framework – The A.D.A.P.T. Cycle

Use the A.D.A.P.T. cycle to make vision adjustments intentional:

1. **A – Anticipate signals**
    - Monitor technological, social, regulatory and environmental changes.
2. **D – Diagnose implications**
    - Interpret how these changes affect your long-term goals and business model.
3. **A – Align perspectives**
    - Facilitate conversations between board, management and key stakeholders.
4. **P – Propose calibrated changes**
    - Define what stays, what evolves and what is discontinued.
5. **T – Test and translate**
    - Run pilots or scenarios and translate adjustments into concrete actions.

9.3. Applied Example (*hypothetical case*)

A board guiding a logistics company has a long-term vision centered on regional expansion.

Suddenly, new environmental regulations and digital trade platforms alter the landscape. Using A.D.A.P.T., they:

- Anticipate: Monitor regulations and digital ecosystems; see a shift toward low-carbon logistics and data-driven networks.
- Diagnose: Realize that expansion without decarbonization could become a liability.
- Align: Convene joint sessions with management, regulators and major clients.
- Propose: Adjust the vision to include leadership in low-emission logistics and data transparency.
- Test: Launch pilots in two corridors, integrating electric fleets and digital tracking.

The essence—connecting regions efficiently—remains, but the route to get there evolves.

9.4. Exercise – Vision Assumptions Review

Objective
Identify the key assumptions behind your current vision and test whether they still hold.

Roles

- **Board strategy committee** – Sponsors the review.
- **Executive team** – Provides market and operational insight.
- **External voice** – Someone with credibility who can challenge internal thinking (e.g., expert or trusted partner).

Inputs

- Current vision statement and long-term goals.
- Scenario analyses, risk registers and market reports.
- External perspectives from regulators, clients or sector peers.

Suggested time

- 4 hours (can be separated into two sessions).

Step-by-step

1. **List the main assumptions (60 min)**
   For example: growth rates, regulatory stability, technology adoption, talent availability.
2. **Rate each assumption (60 min)**
   Assess likelihood and impact if it proves wrong.
3. **Identify "pressure points" (40 min)**
   Assumptions with high impact and rising uncertainty.
4. **Define possible adjustments (50 min)**
   Alternatives for goals, business models or partnerships.
5. **Plan pilots or scenario tests (30 min)**
   Small experiments or simulations to explore new paths.

Deliverables

- Assumptions map with ratings.
- List of potential vision adjustments.
- Plan for pilots or scenarios.

9.5. Template – Vision Adaptation Log

External change (example)	Assumption challenged	Proposed adjustment to vision	Time horizon	Responsible
Rapid regulation on AI use in financial services	"AI deployment will be lightly regulated."	Commit to becoming a reference in responsible AI.	5–7 years	Strategy Cmte

9.6. Checklist – Adjusting Vision

- ☐ We regularly scan the environment for technological, social and regulatory signals.
- ☐ We know which assumptions support our current vision.
- ☐ There is a formal process to review and, when necessary, recalibrate the vision.
- ☐ Adjustments are communicated with transparency and empathy.
- ☐ We experiment before making irreversible commitments when uncertainty is high.
- ☐ Our stakeholders perceive consistency of purpose, even when strategies change.

9.7. Suggested KPIs – Vision Adaptation

- Frequency of structured environmental scanning sessions per year.
- Number of key assumptions identified and monitored.
- Time between detecting a major change and discussing its implications at board level.
- Number of scenario exercises or pilots launched in response to emerging signals.
- Stakeholder confidence in the organization's ability to adapt (survey or feedback).

---

10. Global Templates and Tools

Beyond subtopic-specific tools, this section summarizes **global templates** you can deploy across your strategic vision work.

10.1. Impact × Effort Prioritization Rubric

Use this to focus on the initiatives that move the vision forward with a realistic level of effort.

Initiative (example)	Impact (1–5)	Effort (1–5)	Priority	Responsible	Next milestone	Date
Design board-level vision dashboard and pilot in 2 cycles	5	3	High	Strategy chair	Prototype dashboard in next board meeting	15/10

10.2. RACI Matrix for Strategic Vision Project

Clarify who does what when implementing this guide's recommendations.

Activity (example)	R	A	C	I	Deliverable	Date
Define long-term goal map	CEO	Board	Strategy team, key advisors	Wider leadership group	Documented 4-horizon goal map	30/09

10.3. Vision KPI Board

Central place to track the most relevant indicators.

KPI (example)	Definition	Target	Baseline	Frequency	Owner	Data source
Strategic alignment index	% of managers who see clear link between work and vision	80%	42%	Annual	HR / People lead	Engagement survey

10.4. Human–Cultural Risk Map

Capture risks related to people, culture and governance that could derail the vision.

Risk (example)	Probability (H/M/L)	Impact (H/M/L)	Mitigation	Owner	Status
Leadership fatigue regarding long-term change agenda	M	H	Plan realistic pacing; provide support and succession pathways.	Board chair	In progress

10.5. 30–60–90 Day Implementation Plan

Turn insights into a concrete timeline.

Horizon	Objective (example)	Actions	Responsible	Indicators	Deliverable
30 days	Define or update long-term goal map	Run workshop; assign owners	Strategy lead	Map approved by board	Long-term goals document
60 days	Design vision narrative and initial dashboard	Draft story; select KPIs; pilot reporting	CEO + CFO	Story used in 2 key meetings; pilot run	Vision story + dashboard prototype
90 days	Align teams and launch adaptation cycle	Alignment workshop; define assumptions review	Executive team	Actions identified and scheduled	Alignment plan + ADAPT roadmap

---

11. Summary and Next Steps

11.1. Integrated View

Throughout this guide, you have explored how to:

1. **Set long-term goals** that integrate resilience, growth, transformation and legacy.
2. **Communicate an inspiring vision** that speaks to both heart and metrics.
3. **Align teams and structures** so that daily decisions reflect the chosen direction.
4. **Measure progress toward the vision** through a balanced dashboard.
5. **Adjust the vision intentionally** as the external environment evolves.

Strategic vision is not a one-time exercise. It is a **continuous leadership practice** that combines clarity, humility and courage.

11.2. Next Steps Checklist

Use this table to define what happens after you finish reading.

Next step (example)	Responsible	Deadline	Status	Observations
Schedule board–executive workshop on long-term goals	Board chair	15/09	Planned	Use Section 5 exercise as agenda backbone.
Develop first draft of vision narrative using V.I.S.I.O.N.	CEO + comms lead	30/09	Planned	Test with a small group of employees and partners.
Design and pilot vision dashboard in two board meetings	CFO + strategy	30/11	Planned	Start with limited set of indicators; refine after pilot.

---

12. Self-Assessment – How Strong Is Your Strategic Vision Practice?

Answer each statement with a score from **1 to 5**:

- **1** = Strongly disagree
- **2** = Disagree
- **3** = Neither agree nor disagree
- **4** = Agree
- **5** = Strongly agree

1. Our long-term goals are clearly defined across different time horizons.
2. The board regularly discusses topics beyond the next 12–24 months.
3. Our vision is communicated in a way that leaders and teams can easily understand.
4. People at different levels can explain how their work connects with the vision.
5. We have structured spaces to listen to stakeholders and integrate their perspectives into the vision.
6. Our organizational structure and governance forums support, rather than block, the strategic direction.
7. Incentives and performance metrics are aligned with long-term goals.
8. We have a dashboard that tracks progress toward the vision in more than just financial terms.
9. The board receives timely, reliable data to monitor strategic progress.
10. We regularly scan the environment for signals that could affect our vision.
11. We know the key assumptions underlying our current strategic direction.
12. There is a clear process to adjust the vision when assumptions or conditions change.
13. Strategic debates at board level balance ambition, risk and human impact.
14. Our stakeholders perceive us as an organization with a clear and credible long-term direction.
15. We have a concrete 90-day plan to apply insights from this guide.

12.1. Scoring Method

1. Add the scores for the 15 items to obtain your **total** (between 15 and 75).
2. Divide the total by 15 to obtain your **average score** (between 1.0 and 5.0).

12.2. Interpretation and Recommendations

- **1.0 – 2.5: Vision at Risk**
  Strategic vision is fragile or fragmented.
  - Prioritize Subtopics 1 and 2 (goals and communication).
  - Focus on a small number of clear long-term goals.
  - Use the Vision Narrative Canvas to build a shared story.
- **2.6 – 3.8: Vision in Transition**
  Important elements are present, but coherence and discipline are uneven.

    - Work on Subtopics 3 and 4 (alignment and measurement).
    - Ensure governance, KPIs and incentives reinforce the vision.
    - Use the Alignment Table and Vision Dashboard templates.
- **3.9 – 5.0: Vision as a Strategic Asset**
  Vision is a real differentiator and guide for decisions.
    - Deepen Subtopic 5 (adaptation) to stay ahead of change.
    - Consider mentoring other organizations in your ecosystem.
    - Document your practices and learnings as part of your legacy.

---

13. Glossary (15 Key Terms)

1. **Strategic Vision**
   Coherent picture of the future an organization seeks to create, serving as a compass for decisions and investments.
2. **Long-Term Goal**
   Specific commitment that expresses what success should look like over several years, aligned with the vision.
3. **Resilience Horizon**
   Timeframe focused on ensuring continuity, stability and risk management (usually 0–3 years).
4. **Transformation Horizon**
   Period in which deeper changes in business model, technology and capabilities are expected (often 5–10 years).
5. **Legacy Horizon**
   Far-reaching perspective that considers the organization's contribution to society and future generations.
6. **Vision Narrative**
   Story that weaves together context, challenges, commitments and desired outcomes in an inspiring way.
7. **Stakeholder**
   Any group or person affected by an organization's decisions or able to influence its success (e.g., clients, employees, communities, regulators).
8. **Alignment**
   Degree to which structures, incentives, processes and behaviors are consistent with the strategic vision.
9. **Governance**
   Set of mechanisms, roles and processes through which decisions are made, supervised and held accountable.
10. **Dashboard**
    Visual representation of key indicators that allows leaders to monitor progress and take informed decisions.
11. **Indicator (KPI)**
    Quantitative or qualitative measure used to track performance related to a specific goal.
12. **Scenario**
    Coherent description of a possible future context used to explore options and stress-test strategies.
13. **Assumption**
    Condition believed to be true about the environment or organization which, if false, could change strategic choices.
14. **Environmental Scanning**
    Systematic monitoring of external factors (technological, social, economic, regulatory) that may affect the organization.

15. **Strategic Adaptation**
    Process of adjusting vision, goals or strategies in response to significant changes, while preserving core purpose.

Final Note of Gratitude

Thank you for dedicating time and focus to this material. Each concept and tool here was designed to provide clarity and strategic vision.

The fact that you are here—investing in yourself and your organization—is proof of leadership commitment.

Remember: true impact comes not only from learning but from **applying and sharing** it. May this guide support wiser decisions, deeper conversations, and more meaningful transformations.

Reference to the HBT PORTAL™

The place where each week you will find:

- 📕 Practical ebooks.
- 🎧 Podcast summaries on Spotify.
- 🎥 Videos on YouTube.

All designed to connect innovation with the human.

🔗 **HBT PORTAL™**