Creating a Shared Vision & Purpose

This tool will enable teams to build a shared understanding of their common purpose and generate a clear image of the future success they strive to achieve. Vision serves as a compass to guide and track team progress. Teams with a clear purpose and vision accelerate their progress toward high performance. Teams without clear direction often experience increased conflict, lack of clear progress, people working in different directions, setbacks and slow momentum due to lack of direction and lack of focus on future success.

A Vision is a mental picture of what tomorrow will look like. Visions generate and focus team energy. They enable everyone to see more clearly what lies ahead. A team’s vision should express its highest standard of excellence and most prized values. Team Purpose is a statement of why the team exists. Purpose gives meaning to daily activities, while vision channels multiple team activities toward a desirable future.

In order for a vision to focus team energy in a common direction, it needs to be shared by all team members. By generating individual images of success and combining them to create one integrated vision, teams can leverage the potential of the entire team. Once individuals contribute to a larger vision that aligns team activities, daily progress can be tracked and opportunities to collaborate with one another become more apparent.

Clarifying why a team is on this journey together and what their destination will look like is an important first step toward high performance. However, accelerating team momentum toward the vision is dependent upon the team’s ability to translate the vision into decisive action. This requires an ongoing dialogue about the vision and how it relates to daily team functioning and individual behavior. The real value of creating a team vision lies not in the product itself, but in the conversations and results it generates. Improvements in team effectiveness that stem from a clear, compelling vision of the future state inevitably illuminate new paths to excellence.

Define Team Purpose

A purpose answers the question, “Why does our team exist?” A clear team purpose provides meaning and direction to daily team activities. A team’s purpose should define its unique contribution to the organization’s Mission. In times of change and stress, a well defined purpose can help team members stay
Creating a Shared Vision & Purpose (continued)

on course and find innovative new ways to meet the team’s goals and critical success factors.

While referring to companies’ mission statement, the team should answer the following questions:

- Why has this team been formed?
- What value do you/will you provide to your customers? **Note:** Does the team know who their customers are? If not, defining the customers needs to occur.
- What is unique about this team’s contribution to the companies’ mission.

Facilitate a discussion and incorporate/combine answers. Depending on the size of the team, you may want to break them into sub-groups to work on these questions. If there is major disagreement on the team’s purpose, a longer discussion on why the team exists will be necessary. If the team still can’t reach agreement on what their purpose is, then the team leader needs to review the team’s expected contribution with senior leadership off-line and report back to the team.

Assign the Purpose Statement to one person or small group to finalize the wording and distribute to the entire team.

**Criteria for Effective Team Purpose Statements**

- Advances the Mission of the organization.
- Describes the principal function, scope, and services (value delivered to the organization) provided by the team.
- Is clear and easily understood by those within, and outside, the team.
- Identifies key customers or stakeholders served.
- Is forward looking.
- Describes the team’s unique competencies. What makes this team capable of contributing to the organization’s success in ways no other team can?
- Expresses the beliefs of team members and the organization about how business should be conducted.
- Provides an inspiring, meaningful reason for working together for team members.
Creating a Shared Vision & Purpose (continued)

Create Future Images

Begin to articulate the team’s vision by having the team choose five of the most pressing questions this team needs to address to be successful. Sample questions may include:

- Who are our customers?
- What value do we provide to our customers?
- How do our customers talk about us?
- How do employees and other teams talk about us?
- How do members of the leadership team talk about the team?
- What is the unique contribution this team made to organization success?
- How did our team work together to achieve these results?
- How did successful implementation happen?
- How do we work with our customers to achieve successful results?
- What lessons have we learned in creating success?

Facilitate a work session in which the team members answer every question while imagining a future date. The questions should be answered as if reflecting back on the team’s efforts. The team members should be specific and creative – imagining that their greatest aspirations for this team have been realized. Use flip charts or post-it notes to document all team members’ responses.

Another option for teams to create a shared vision is to ask the team to imagine a future date when the team’s work is complete. Several members of the senior leadership team recognize the team’s accomplishments in a leadership meeting. Have the team discuss and answer the following questions:

- What is said about the team?
- What achievements are mentioned?
- How is the team described?

Work together to come up with one sentence for each question. This should create a clear picture of what success will look like for the team.

**Note:** It is important that each individual on the team have a voice in stating/displaying/writing their answers to the questions in order for the final vision to be a compilation of input from all members.
Creating a Shared Vision & Purpose (continued)

Create Shared Vision

Team members should now combine all the individual images or answers to the questions into a brief paragraph that captures the language and images expressed on the flip charts or post-it notes. Depending on the size of the team, sub-groups may be a good option.

The team or sub-groups should discuss what themes the images share. Look for a way to combine individual images into one compelling vision consisting of 2-4 sentences. Be sure to note those images that do not seem to fit with the others. These should be discussed as a team to determine if they should remain. Write the summary on a flip chart or combine the work of the sub-groups. Working as a team, discuss whether the vision needs additions or deletions. Gain final agreement on vision.

Share the Vision

Assign someone to transcribe the team’s vision and distribute to team members. Consider an action plan for sharing the vision. For instance; who should the vision be shared with, who is accountable for doing this and what is the time frame?

It is important that the team revisits the Purpose and the Vision periodically to make sure the team is on track. Is this still the thinking of what success looks like and how it will happen? This is especially true when there are changes in the team’s working conditions. This may include changes in team membership, additions or changes to goals or initiatives, changes in scope, or organizational changes.