

The
Fifth
Discipline
Fieldbook

Strategies and Tools for Building
a Learning Organization



VISION, VALUES, PURPOSE (OR MISSION), GOALS

Although this discipline is called “building shared vision,” that phrase is only a convenient label. A vision is only one component of an organization’s guiding aspirations. The core of those guiding principles is the sense of shared purpose and destiny, including all of these components:

Vision: an image of our desired future

A vision is a picture of the future you seek to create, described in the present tense, as if it were happening now. A statement of “our vision” shows where we want to go, and what we will be like when we get there. The word comes from the Latin *vidēre*, “to see.” This link to seeing is significant; the more richly detailed and visual the image is, the more compelling it will be.

Because of its tangible and immediate quality, a vision gives shape and direction to the organization’s future. And it helps people set goals to take the organization closer.

Values: how we expect to travel to where we want to go

The word “value” comes from the French verb *valoir*, meaning “to be worth.” Gradually it evolved an association with valor and worthiness. Values describe how we intend to operate, on a day-by-day basis, as we pursue our vision. As Bill O’Brien points out, Adolf Hitler’s Germany was based on a very clear shared vision, but its values were monstrous.

A set of governing values might include: how we want to behave with each other; how we expect to regard our customers, community, and vendors; and the lines which we will and will not cross. Values are best expressed in terms of behavior: If we act as we should, what would an observer see us doing? How would we be thinking?

When values are articulated but ignored, an important part of the shared vision effort is shut away. By contrast, when values are made a central part of the organization’s shared vision effort, and put out in full view, they become like a figurehead on a ship: a guiding symbol of the behavior that will help people move toward the vision. It becomes easier to speak honestly, or to reveal information, when people know that these are aspects of agreed-upon values.

***Purpose or Mission:* what the organization is here to do**

“Mission” comes from the Latin word *mittere*, meaning “to throw, let go, or send.” Also derived from Latin, the word “purpose” (originally *prōpōnere*) meant “to declare.” Whether you call it a mission or purpose, it represents the fundamental reason for the organization’s existence. What are we here to do together?

The “mission” is more popular in organizations today, but it has unfortunate military, religious, and short-term overtones: “Our mission is to take this hill [or die in the attempt]!” I prefer the word “purpose”; it suggests more of a reflective process. You will never get to the ultimate purpose of your organization, but you will achieve many visions along the way.

***Goals:* milestones we expect to reach before too long**

Every shared vision effort needs not just a broad vision, but specific realizable goals. Goals represent what people commit themselves to do often within a few months. The word may have come from the Old English *gælan*, to hinder, and goals often address barriers and obstacles which we must pass to reach our vision.—BS