

The
Fifth
Discipline
Fieldbook

Strategies and Tools for Building
a Learning Organization



47 Building Shared Vision: How to Begin

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Imagine this scene: in a large hotel ballroom, 1,000 members of an organization, representing every level, sit in rows. Standing before them, the CEO has just finished a forty-five-minute presentation on the organization's vision. Now he looks out across the room: "If you want to make this vision your own and make it happen," he says, "please indicate your personal commitment by standing up."

There is a momentary buzz of excited conversation. Then, beginning at the front of the room and sweeping to the back like a thousand-person wave, everyone springs to their feet and begins applauding. The CEO joins in the cheering, laughter, and celebration, but he is no longer the center of focus. People's faces beam with pride in themselves and each other.

It has been a very effective hour—and it represents the culmination of a year of intense conversation and dialogue. Everyone in the audience has taken part in at least one shared vision session, talking about their aspirations for their lives and their work. The resulting vision is a creative synthesis of all that has emerged. It is like a diamond with many diverse facets, and each member can see through at least one facet as a personal window into the larger vision. Every member of the audience had heard his or her own aspirations reflected somewhere.

Six months later, the process continues. People throughout the organization continue to meet in small teams at work, at local gathering places after work, and even in each other's homes. Conversations focus

on what they can do—individually and as teams—to move toward the vision. Their pride, energy, and commitment is even more evident than it was in the large meeting six months before.

But suppose that there had not been that year of intensive dialogue before the CEO spoke. Suppose the CEO had written out the vision over a weekend, and the “sharing” process had lasted an hour, from the moment the speech began to the collective “yes” which it evoked. An observer, watching the stage, might notice no difference in the words of the speech, the charisma of its delivery, or the enthusiasm of the crowd. However, many of the people there would feel unsure about their commitment. Yes, they would find it difficult to remain seated while others cheered, but they might not grasp the vision’s implications or feel any personal responsibility for it.

It would be tempting for the CEO to conclude that the job was done. “I’ve come up with my vision and shared it, so now we have a ‘shared vision.’ Everyone in the organization has taken it for their own.” But it is highly unlikely that a brief process, like a one-hour speech, can lead to a true shared vision—a vision which draws out the commitment of people throughout the organization. A vision is not really shared unless it has staying power and evolving life-force that lasts for years, propelling people through a continuous cycle of action, learning, and reflection.

After a failed shared vision attempt, I have heard senior managers say, “Once again we’ve just proved that these people spend all their time complaining. They’re obviously not responsible. I’ll just have to tell them what we’re going to do from now on.” Meanwhile, subordinates say, “It’s obvious now that this organization has no interest in our input about the direction for the future.” *Both* attitudes are actually symptoms of the fact that there was no deliberate, strategic design of the shared visioning process.

Who carries out a shared vision strategy? It is generally handled most effectively by a partnership between the senior manager responsible for an organization, and a skilled, or committed “steward” of the vision. For more about this partnership see “Letter to the CEO” (page 328), and “Letter to the CEO’s Partner” (page 333).

A strategy for building shared vision

SHARED VISION STRATEGIES SHOULD BE DEVELOPMENTAL. EVERY STAGE of the process should help build both the listening capacity of the top leaders, and the leadership capacities of the rest of the organization, so

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that they can move together to the next stage. To include most of the practical realities people face, I have identified five potential starting points. I believe every organization is already predisposed to one of them.

I recommend you objectively assess which stage best describes your organization now. Then develop a plan to move to the next stage using the strategies outlined in the following pages. The five stages are:

Telling: The “boss” knows what the vision should be, and the organization is going to have to follow it;

Selling: The “boss” knows what the vision should be, but needs the organization to “buy in” before proceeding;

Testing: The “boss” has an idea about what the vision should be, or several ideas, and wants to know the organization’s reactions before proceeding;

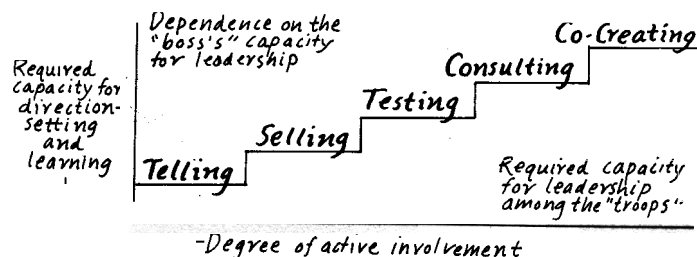
Consulting: The “boss” is putting together a vision, and wants creative input from the organization before proceeding;

Co-Creating: The “boss” and “members” of the organization, through a collaborative process, build a shared vision together.

THE “BOSS” AND THE “MEMBERS”

In using the term “the boss” here, I mean any formal leader, executive manager, or supervisor who has sufficient authority and autonomy to preside over a visioning process without being overridden by other managers. I also use the terms “CEO,” “senior manager,” and “formal leader” to mean “the boss.”

My preferred term for other participants is “members.” This term reflects the reality that all participants, even if they are not asked for their vote or opinion, end up “voting” with their behavior—which may range anywhere from active resistance through full support of the vision. To describe this role, I also use the terms “employees,” “subordinates,” “team members,” and “participants.”



In this picture of the five stages, the further to the left, the more the organization depends on a strong leader to “tell” everyone what the shared vision should be. The further to the right, the more leadership, direction-setting, and learning capacity the organization as a whole must have. Here, the boss is less “the person with the answers,” and more the convener of a robust process.

Any organization which does not adopt a somewhat formal, concerted shared vision process will probably find itself following the path of least resistance: down toward the left, falling back to the “telling” orientation. The boss will gradually become more authoritarian, and the rest of the organization more passive.

But if you climb uphill toward “co-creating,” then each stage adds to your ability to reach the next stage. The boss’s capacity to listen, and the organization’s capacity to develop aspirations, gradually reinforce and complement each other.*

Stage 1: “Telling”

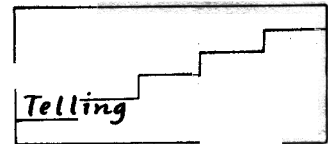
“WE’VE GOT TO DO THIS. IT’S OUR VISION. BE EXCITED ABOUT IT, OR RECONSIDER YOUR VISION FOR YOUR CAREER HERE”

People don’t get to vote. When the boss says, “This is the vision of what the organization is going to look like two years from now,” people know that if they disagree, or if they are caught undermining the change, they jeopardize their career. “Telling” often takes place in a crisis, when the senior managers perceive that some dramatic change is necessary.

For example, in Noel Tichy and Stratford Sherman’s book *Control Your Destiny or Someone Else Will*,* Jack Welch knows he has very little time to make his organization profitable. So he proclaims his famous dictum that all of General Electric’s businesses will be either #1 or #2 in their market, or sold—and tells everyone that if they don’t embrace that vision, they won’t survive long at GE.

Although “telling” is a traditional and somewhat authoritarian form of instigating change, a “told” vision is still a vision, with power for galvanizing activity. I have seen effective messages from a boss that clearly and honestly describe a vision and sense of current reality in positive terms, and then say: “We can’t afford anything less than a complete swing to this new strategy. Given my responsibility to the board, I’m going to be firm. After a period of time for raising concerns, people will

* Credit: The visual diagram and some of the points along the continuum are influenced by “How to Choose a Leadership Pattern” by Robert Tannenbaum and Warren Schmidt, *Harvard Business Review*, March/April 1958. Rick Ross also influenced the conceptual framework in this piece.



* See *Fieldbook*, p. 68

have to leave if they can't support the new direction. We don't have unlimited time or energy for cross-currents when we're implementing such a major change."

If this is delivered in the proper mode, you can imagine people responding: "The boss is right. I don't understand it fully, but I'm willing to support it."

TIPS FOR MASTERING THE "TELLING" MODE

Inform People Directly, Clearly, and Consistently

An effective "telling" medium is efficient, revelatory, direct, and consistent throughout the organization. Letters and videos, if well produced, serve this need; so do personal speeches, especially if there are opportunities for questions and follow-up. Make sure to substantiate what you've got to say. Filling in the reasons why a change must be made is essential, if the organization is going to follow.

Tell the Truth About Current Reality

One central function of vision is to generate creative tension; to make sure people understand the difficulties of current reality, and generate the "pull" that comes from understanding your true distance from the vision. Anything less than the truth can destroy credibility. If some information is sensitive or confidential, explain why you can't disclose it.

Be careful not to build your message on a negative vision of the future that you're trying to avoid, such as: "Our vision is to avoid getting killed by the competition." There is a profound difference between "vision by desperation" and "vision by aspiration."

Be Clear About What Is Negotiable and What Is Not

There may be certain areas where subordinates have degrees of freedom to influence, and others where they literally have no influence. If so, tell them. If you are being held accountable by the board for certain results with few degrees of freedom, tell them that.

Paint the Details, but Not Too Many Details

A vision ultimately needs richness and detail to come to life. Early on, however, don't fill in too many details, because this may be the organization's only opportunity to make the vision its own. When Honda's senior managers sought to create a pattern of innovation, they set out the simple vision: "Let's Gamble." Branches of the company, in North America and elsewhere, translated that into specific ideas for action.

{ } Also see the tips for the CEO on page 330

THE LIMITS OF “TELLING”

Research on verbal communications shows that people remember only about 25 percent of a message told to them. And everyone may remember a different 25 percent! Moreover, if the message is a “told” vision, people will comply, but few will feel any reason to commit themselves to it. Leaders who rely on “telling” often end up frustrated with what they perceive as poor communication: “I spelled out the vision, but people still don’t seem to act according to it.”

Unfortunately, many managers respond by repeating the same message, at a louder volume, or on a longer video. But employees can only go so far when they are passive recipients of a vision. It will be far more effective for the boss to begin moving to the right on the continuum—to “selling.”

Stage 2 “Selling”

Selling

“WE HAVE THE BEST ANSWER. LET’S SEE IF WE CAN GET YOU TO BUY IN”

The leader attempts to “enroll” people in the vision, enlisting as much commitment as possible. “This is the right thing to do, and I believe in it,” a CEO might say, “but we can only do it if the organization comes on board with me.” The employees are like the boss’s customers, and they can say “no” in many different ways, including passive resistance. Until the employees say “yes” wholeheartedly, the senior managers haven’t closed the deal.

TIPS FOR MASTERING THE “SELLING” MODE

Keep Channels Open for Responses

For example, follow up speeches about the vision with break-out groups, so that senior managers can find out how much of the message is “selling.”

Support Enrollment, Not Manipulation

Enrollment, as Innovation Associates founder Charlie Kiefer puts it, is “the process of becoming part of something only by choice.” You do not enroll others; people can only enroll themselves. You can present them with a picture, including evidence of your own enrollment: “I’m personally committed to take the organization this way.” If people see the vision is good for them, even if it takes a leap of faith, they will tend to sign on. Trusting that they will is *your* requisite leap of faith.

Build On Your Relationship with the “Customer” – Your Employees

The implicit message in a “selling” effort is: “I’m depending on you for this to work. I value my relationship with you. If you all thoroughly disagree I may not do it this way; I recognize that you have some influence over me. I will not force or manipulate you to do something you really don’t want, because I know that will ultimately undermine our organization.”

Focus on Benefits, Not Features

Rather than merely describing the vision, demonstrate how it will serve the needs, desires, and situation of your employees. For example, instead of saying, “This will cut our costs by 20 percent in three years,” you might say, “For the first time in a decade, we’ll be talking with our customers and suppliers about the *real* issues we have all wanted to address, but couldn’t until now.”

Move from the Royal “We” to the Personal “I”

To say, “This is the vision we endorse as a company” implies that you have taken for granted that everyone listening will be excited, motivated, and inspired by it, just because they work there. Almost by definition, this provokes resentment. Instead, speak about why it’s important to you personally, and what special meaning it has for you.

THE LIMITS OF “SELLING”

The boss wants to hear a “yes.” The employees want to hear that they will keep their jobs. A “compliant yes” often seems like the safest course for all. “I can go along with that,” members say. “I’ll give it a try.” If you need more commitment, then you will probably need to move forward to “test” or “consult” about the vision.

Sometimes people don’t buy the vision, despite your best efforts. Then you have a choice. You can move back to the “telling” mode, and force compliance. This may be appropriate if the survival of your organization is at stake. Or you can move forward to “test” and “consult”: “What should I know before I make another proposal?”

Stage 3: “Testing”

“WHAT EXCITES YOU ABOUT THIS VISION? WHAT DOESN’T?”

The leader “lays the vision out for testing,” as Bill O’Brien puts it—not



Testing

just to find out whether the members support the vision, but how enthusiastically they will accept it, and what aspects of it matter to them. The results are used to refine and redesign the vision. The process of testing can galvanize response. Having been asked their opinion, people feel more compelled to discuss and consider the proposed vision. As in market research, the “test” implies that the respondents will influence the results. A shared vision which no one supports must go back, in essence, to the drawing board.

The more capacity for personal mastery that has been developed in the organization, the better results you will get. A good test depends on people’s willingness to tell the truth, and on their ability to perceive current reality. If people say “count me in,” then the boss will count them in—and count *on* them at the appropriate time. For that reason, a false “yes” can be much worse than an honest “no.”

TIPS FOR MASTERING THE “TESTING” MODE

Provide as Much Information as Possible, to Improve the Quality of the Responses

Present the vision with all its ramifications spelled out—particularly difficulties. Otherwise, the test won’t measure how people feel about the necessary changes and impacts.

Make a Clean Test

When you ask someone to choose between alternatives A, B, and C, design the test as if you really want to know the answer. Don’t set it up intending them to choose A and think it’s their idea. They will see through it, and you will lose your opportunity to learn what they think.

Protect People’s Privacy

Design the test so people can answer anonymously, without fear of repercussion—or at least without a penalty for negative answers. You can almost guarantee, in a testing process, that you will hear unexpected bad news that had never emerged before this visioning process began.

Combine Survey Questionnaires with Face-to-Face Interviews

In many cases, questions about a shared vision are more subtle than a survey form can express. That suggests person-to-person interviews, group interviews, or large-scale conferences. The visible size of the group gives an implicit sense of “safety in numbers.” Ideally, a conference should include people from every job category meeting in break-out groups. A facilitator should tally reactions without noting who said what, and amalgamate them into a report.

Test for Motivation, Utility, and Capability

Do people *want* to move toward the vision? Do they think the vision would be useful to them or to the organization? And do they think that they, and the organization, have the capability to move toward the vision? If not, what's missing?

}} The discipline of Personal Mastery may be relevant here; see page 193.

THE LIMITS OF "TESTING"

Simply by virtue of being there, employees have developed a wide range of ideas and concerns about the well-being of the organization, and its ability to grow and prosper. None of this can be expressed through a test. To compensate, you can design questions about the test itself into the questionnaire: "How do you feel about this feedback process?" Or you could set up a focus group to allow people to break out of the structure, and answer their own questions. When a testing process has taken one of these steps, it is no longer testing. The organization has moved on to consulting.

Consulting**Stage 4: Consulting****"WHAT VISION DO MEMBERS RECOMMEND THAT WE ADOPT?"**

Consulting is the preferred stage for a boss who recognizes that he or she can not possibly have *all* the answers—and who wants to make the vision stronger by inviting the organization to be the boss's consultant.

In a "consulting" process, you may say: "I want to build a vision for the organization, but before I make up my mind, I want to know what you think." You want people not just to come up with specific suggestions, but to become fully engaged in thinking through the ramifications of their ideas. For yourself, you reserve the role of judge: you still choose to accept or ignore what people say (as you would with any consultant), you determine the content of the organization's vision, and you decide how to begin moving in that direction.

Some managers are reluctant to move from "testing" to "consulting" because they fear they may be overwhelmed by options to consider. This is often a valid concern. The boss's capacity for considering options may be limited; so may the capacity of the rest of the organization. "Don't ask us to create a vision," members may want to say. "That's your job."

Even more likely, pressure to finish quickly while not offending anyone may lead the boss to accept a middle-of-the-road, all-things-to-all-people compromise vision. For all these reasons, if you are the boss, and you find yourself resisting the idea of a massive consulting effort, you may be right to move back to “testing” while you build up the organization’s (and your own) capacity for surfacing the mental models which underlie the suggestions.

TIPS FOR MASTERING THE “CONSULTING” MODE

Use the “Cascade” Process to Gather Information

A typical cascade sequence, which may last several months, brings together small teams of ten to fifteen people at every level, starting with the top of the organization. I generally favor teams with natural working relationships—composed of a boss and direct reports, sometimes supplemented by “bright lights” from parallel functions or related divisions. After each meeting the team members go back to discuss the vision with their subordinate teams. Then those members carry the process one step lower. At the very end, the teams meet again to collect responses from the bottom teams, react to them at the next-higher teams, and so on back up to the top.

The cascade process works best when responsible managers run their teams, but a committed group of facilitators are available as resources—helping draw out discussion, bringing some mental models skills to bear, and making sure that responses are recorded accurately. The most difficult task in many cascade processes is ensuring that critiques survive the journey back from the bottom to the top.

Build in Protections Against Distortion of the Message

Starting each team meeting with a videotaped message from the “boss” can accomplish this. However, when the vision changes as a result of the “consulting” process, you need to update the videos. Alternatively, you can ask people to read a document, but people tend to misinterpret documents more easily.

Gather and Disseminate Results

Collect anonymous written comments from participants after every “consulting” session. This ensures that people who do not want to speak openly can nonetheless be heard. This is important not just for their sake, but because their comments may be valuable. A written report, however, should not be seen as a substitute for open meetings, where constructive disagreement and surfacing of mental models take place.

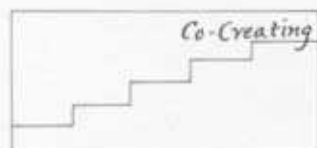
}} Kees van der Heijden suggests a form of this technique in his cameo on Shell's internal consultancy, page 279.

Don't Try to Tell and Consult Simultaneously

If you tell them the "right" vision, as you see it, and then ask: "What do you think about this?" you will get a ho-hum response. People will say, "Why bother replying? You've already told me what you want me to think." To keep suggestions in reasonable territory, you can lay out boundaries: "Bear in mind that any vision should deal with our attitude to customers, and should not ignore the debt from our recent restructuring."

THE LIMITS OF "CONSULTING"

The "consulting" mode (like "telling," "selling," and "testing,") is limited by a tacit, usually unquestioned assumption: that the objective of the process is to create one vision from the top for the entire organization, rather than bringing together multiple visions in an organic interdependent whole. Our experience suggests that this is a faulty premise. Especially for middle- and lower-level members, the most significant elements of a vision are almost always local, anchored to a team, work unit, or place. A shared vision is strongest when it builds from that foundation outward, connecting local visions with their counterparts throughout the organization.



Stage 5: "Co-creating"

"LET'S CREATE THE FUTURE WE INDIVIDUALLY AND COLLECTIVELY WANT"

As Bill O'Brien says, "It's an important day in everyone's life when they begin to work for what they want to build rather than to please a boss." The organization whose leaders and members understand this is ready to benefit from a "co-creating" shared vision process.

"Co-creating" places every member in a creative orientation. Every step involves choice. Individuals begin by drawing forth aspects of their personal vision.

}} See "Drawing Forth Personal Vision," page 201.

Teams articulate their sense of common purpose: Are they here to serve customers, to produce better products, or to serve the organization's

other members? As teams define what is of primary importance in their work, a new hierarchy of meaning emerges for the organization as a whole.

For example, the top team of an information retrieval company decided at a “visioning” meeting that their values should include “functioning with integrity.” One of the participants asked, “well, does ‘integrity’ apply to us alone, or does it include customers?”

“Of course, we’re not going to be honest with our *customers*,” said someone at the table. Then they looked at each other in silence. In their industry, vendors routinely promised customers delivery dates that they knew they could not meet—and let the date slip later. The team began a three-hour dialogue, without a break; when it ended, they had changed their corporate vision. “If we’re putting up integrity as a value,” one senior manager said, “we need integrity in all aspects of our business.”

Current reality, however, presented them with a dilemma; if they changed immediately, they would be unable to match their competitors’ delivery promises, and they’d be out of business. So they developed a strategic migration plan. They visited key customers and said, “Look, this industry is based on exchanges of false promises. You know it. We *know it. Nobody likes it, but we all feel stuck with it. We would like to change that, and we would like to start by being honest with you.*” Thenceforth, every delivery date they offered those customers was realistic—and honored. Within a year, their business was growing exponentially and their profits skyrocketed.

TIPS FOR MASTERING THE “CO-CREATING” MODE*

Start with Personal Vision

When a shared vision effort starts with personal vision, the organization becomes a tool for people’s self-realization, rather than a machine they’re subjected to. People begin to stop thinking of the organization as a thing to which they are subservient. Only then can they wholeheartedly participate in guiding its direction.

Many leaders imagine that encouraging people to identify and express their personal vision would lead to anarchy and disarray. But to expect people to veer wildly off-course is to make several assumptions: first, that members secretly harbor a desire to thwart the organization and see it fail; second, that they see no benefit for themselves in having a common purpose; third, that they can imagine no role for themselves in leading or inspiring others; and fourth, that there are no leaders link-

We follow this progression in the intensive three-day Visionary Leadership and Planning programs we designed at Innovation Associates. First, articulation of personal vision. Second, evolving from that into a sense of organizational and shared vision. Third, gaining a mutual understanding of current realities. Fourth, beginning to take action on strategic leverage points to close the gap. For more about Innovation Associates, see p. 568.

ing teams. Experience shows that these assumptions are all unfounded. Most members are eager to link their personal visions to the team and enterprise, and most teams actually share a deep, fundamental sense of alignment—but until they can give voice to these common aspirations, teams can't build upon them.

If there *is* such a deep lack of alignment, then management should be concerned about it—whether or not there is a shared vision effort underway. In any case, the “co-creating” process promotes alignment, not anarchy. As an evolving understanding of the vision and its implications cascades through the teams, there is time for skeptics to understand the process and for everyone to begin thinking freshly about their relationship to the whole.

Treat Everyone as Equal

In the rest of the organization, the boss may wield the decision-making power, but in this exercise bosses should only get one vote. Similarly, no one team should get more votes than any other. During these exercises, discourage status differences however you can—through process design or by tapping people's innate sense that their personal visions are equal to anyone else's. Make sure that views travel down *and up* in the hierarchy with equal speed and efficacy.

Seek Alignment, Not Agreement

The temptation will be strong to paper over differences for the sake of reaching resolution and producing a coherent output. Teams should discourage this. Instead, they should use team learning practices such as skillful discussion and dialogue to look for the assumptions beneath the disagreement, and see what mental models have led to this unreconcilable view.

See “Skillful Discussion,” page 385, and “Dialogue,” page 357. The GS technologies story (page 364) portrayed a group of managers and steelworkers that has learned to be aligned and disagreeing.

Among Teams, Encourage Interdependence – and Diversity

In most organizations, people do not talk about their visions in a vacuum. Each team of ten to twelve people is linked to its superiors, subordinates, and peers. Every team leader, as a member of at least two teams, is a crucial leadership link between different articulations of a shared vision.

When team members begin talking about their vision, avoid telling them what other teams have said. Instead, ask each team first: “What do *we* really want?” Once the team's vision has been articulated, then mem-

bers who also belong to other teams can later serve as communicating agents: “Here is what they said about this in Purchasing.” Over time, as teams become curious about each other’s visions, two or more teams may discover a strategic value in meeting together, comparing notes, and creating a shared vision in tandem. This should be encouraged; it can be very powerful. But even here, seek alignment instead of forcing agreement. It’s dysfunctional to insist that team B’s vision echo the wording of team A.

Avoid “Sampling”

A common trap for senior management seems on first glance like a reasonable resource-saving measure: “It’s too darned hard and expensive to talk to everybody, so let’s talk to a sample of people and analyze the themes. They’ll be representative of everyone.” This strategy might be effective in “consulting.” But in “co-creating,” it undermines whatever opportunities people feel to take on personal leadership. Instead of taking a stand within their own team, and saying, “Here’s what I think the vision for our part of the organization ought to be,” people simply answer the questions passively.

Have People Speak Only for Themselves

In our Visionary Leadership and Planning sessions, we do not permit participants to talk about how other people in the organization may react to their vision. It’s important to remember that these other people are not in the room, and any inferences about their reaction are just that—*inferences*. Without that attitude, there’s an inescapable temptation to say, “Well, if we use the word ‘integrity,’ what will Pat think?” Moreover, by alluding to any outside individual or group, the team in the room is giving away the power to determine its own vision, which is the most fundamental driving force in this process. What is left is no longer vision, but the anticipation of frustration. Later, there will be time to see how this team’s vision fits with others—based on real give and take, not fears and guesses.

Expect and Nurture Reverence for Each Other

When a real diversity of opinions occurs in a group, a reverence for each other’s vision will often take hold. I have seen people stop short, their breath taken away, and then say, “I have never seen things from that angle.” In one session in the United States, a team member was a recent immigrant. “In my old country,” he said, “freedom was only a vague concept. Your notions of freedom to participate in the firm’s direction are completely inspiring to me. They even have meaning for my religious beliefs, which were persecuted overseas.” Other people in the

room sat back, startled; they had taken the atmosphere of freedom in the company for granted. Sparked by that member's vision, they realized they wanted to create an atmosphere which would not just preserve, but promote that sense of freedom, both internally and in the communities they lived in.

In my experience, it is rare to see people interrupting someone who is in the middle of describing his or her personal vision. No one says, "You've got your vision wrong. Let me tell you what your life's purpose and vision should be." This is one reason why a co-creating exercise is so valuable: once you appreciate each other's vision, it's easier to understand each other's perspective on current reality, and each other's ideas about courses of action.

Consider Using an "Interim Vision" to Build Momentum

It may be useful to get some interim vision on the table initially. Even if it's brief, rough, and intuitive, this will give team members an initial point of reference. If it comes from higher in the hierarchy, do not distribute it in a memo. Refrain from revealing it right away at team meetings. Wait until the team members have started to get some clarity about their own vision. Then, typically, their fear and cynicism (generally supported by past history) will be triggered. "We're starting to build some momentum and commitment here. What if we run into roadblocks from above?" Now the formal leader can take out the interim vision and say, "Here's what we came up with at the next level. I want to show you how our vision here actually aligns with the team's above us, even though the words are very different." Handled with the right personal leadership, that exchange is crucial. It represents the heart of the aligning process.

Focus on the Dialogue, Not Just the Vision Statement

Visions often translate into vision and purpose statements, which seem cryptic to outsiders, but have enormous meaning for the people who struggle to craft each word, so that everyone can sign off on them and feel the statement is meaningful. The process is more important than the product. Participants actively instill meaning and inspiration into the words and give them symbolic value; the words on their own mean nothing. That's why the test of a vision is not in the statement, but in the directional force it gives the organization.

CREATING SHARED VISION by Marjorie Parker (1990, Oslo: Senter for Ledelsesutvikling A/S [Norwegian Center for Leadership Development]).

Hydro Aluminum Karmøy Fabrikker, a Norwegian company which is Europe's largest producer of aluminum, spent two years co-creating a shared vision. Marjorie Parker, the organizational consultant who helped them through the process, describes every step along the way. In this story, the pictures really *were* worth 1,000 words: virtually every employee had a chance to sketch their personal version for the organization and then link it with images others had created. The final "vision statement" was not a piece of writing at all, but an extraordinary mural of a flourishing garden, painted by a local artist, in which every plant and element had rich metaphorical meaning. For example, the management was the water supply, feeding into the soil underground and providing essential irrigation, but not visible on the surface. For planners and designers of a "co-creation" effort, *Creating Shared Vision* shows what is possible.—BS



Moving to "co-creating": the larger context of a shared vision

EVERY ORGANIZATION WILL FIND ONE OF THESE STAGES MORE APPROPRIATE than others. Nonetheless, wherever you start on this continuum, building your capacity to "co-create" shared vision has many intrinsic benefits. People repeatedly say how deeply satisfying and fulfilling it is to be part of a vibrant creative process that is directly shaping their individual and collective future. In building and realizing a shared vision, I believe a deep yearning for co-creating within a community can also be satisfied.

I also believe that sooner or later all organizations will move to co-creating, because that is where the larger world culture and society are moving. As Peter Senge points out (see page 563) we are currently twenty years into a process of fundamental redistribution of power and authority in social and political institutions around the world. I see that redistribution process as essential to the very survival of those institutions and, perhaps to society itself.

Traditional models of centralizing power and authority at the top are becoming increasingly dysfunctional. Authoritarian organizations have a hierarchy of meaning, but it is set by a few decision makers. It is typically

narrow: the purpose of the enterprise is to beat the competition, or to keep paying stockholders, or to reward members in carefully defined ways. Policies, decision criteria, and infrastructure designs all flow from this tacit vision and direction. As long as that tacit purpose holds sway then opportunities to “participate” in decision making and even in organizational design will be a manipulative sham. As one control-oriented (but typical) CEO once quipped to me in a candid moment, “I’m glad to promote participative management and let people make decisions at virtually any level, as long as I control the values and criteria that they use.”

Organizational members will “settle for” the lower levels of participation available in these cases, perhaps even willingly as a development step. But the competitive advantage which comes from building learning organizations is not possible without members’ full participation in setting direction and priorities. Anything less is suboptimizing. If learners learn only what they want to learn, then only a deliberate effort to create collective aspiration will move people to “want to learn” what the organization needs; and vice versa.

Given the way societies are evolving along these lines, I think the question is no longer whether organizations will move to meet people’s deep need to feel their aspiration fit with a larger purpose. The question is only when, and how. The choice in today’s organizations is to lead in this process or fall behind.