

VISIONING WORKBOOK



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1 Why Visions Matter

WHEN YOUR VISION IS CLEAR, YOUR DECISIONS ARE EASY.

Having clarity about your vision for your business and life provides a clear roadmap for change. This doesn't mean the decisions don't come with effort or economics, it means that you're clear on what needs to be done to fill the gaps and where to invest your time and energy to achieve those outcomes.

Visioning is the act of accepting and appreciating your current state while elevating your mindset and expanding your possibilities to more fully imagine the bigger, better future you want to create.

Start to unpack your Vision by defining the impact your firm will have on clients' lives:

Why does that matter to you?

2 Crafting Your Vision

Creating a clear Vision helps bring clarity and direction to your strategy and efforts. Here are some tips for crafting a compelling Vision Statement:

SETS AN INSPIRED VISION

A compelling vision statement will be clear and inspired, defining your envisioned future. Defining and envisioning a future state helps focus your brain on creating your new future instead of repeating your past and present.

CREATES A CLEAR PICTURE OF SUCCESS

A vision is a statement about the ideal future state of your firm. A vision should define the Why behind your work, the outcomes you want to create, and the impact you seek to have.

IT EXPLAINS WHY

Knowing what we're working towards and why provides the motivation and clarity we need to move forward in the face of resistance.

Your "why" needs to be authentic to the work you do and the impact you have. The business you build and the way you build it are simply choices you make to support your enduring Why.

ASPIRATIONAL AND ACHIEVABLE

Growing a firm is not easy. You and your team must be excited and engaged about the vision you're creating. A compelling vision statement will include a balance of aspirational and achievable. You want to stretch yourself and your team while making sure the future state feels possible to achieve.



CLARITY COUNTS

Visions need to be clear and specific so that you and your team can easily assess needs and create a roadmap for change. To accomplish this, we suggest you create a simple vision statement, supported by key messaging points that unpack each element of the vision statement. This can be a series of bullets or a full-blown manifesto, depending on your style and preferences.

MAKE IT MEMORABLE

Great visions are clear, concise and compelling. You and your team should be able to communicate your Vision in a minute or less. You'll know your vision is memorable when you see and hear your team using and repeating it regularly.

3 Visioning Exercises

USING THE VISIONING SHEET

The Vision exercise can be done with this worksheet, during a journal entry, or on a whiteboard in discussion with your team. Whatever your preference, the idea is to brainstorm thoughts about each section. Use the brainstormed ideas to craft your vision statement.

ANSWER THE BIG QUESTIONS

For each area in the vision exercise you will answer these questions:

- What does success look like?
- How is that different than today?
- What's the roadmap to getting there?

CRAFTING YOUR VISION STATEMENT

In the visioning exercise you will codify the vision statement using the following framework:

We envision... _____

What is the IMPACT our organization will have on your stakeholders (clients, team, owners)?

By... _____

By when do you want to accomplish your vision?

Because... _____

And why does it matter?

FINALIZING YOUR VISION STATEMENT

Use the exercises that follow to create a clear and compelling Vision Statement to guide your strategy and planning work.

4 Visioning Questions

Reflect on and answer the questions below to create greater clarity about the future state you want to create as you work to complete your Vision Board.

TOP 5 MOMENTS

What were the top 5 moments you experienced in the last year? What made them so positive?

PERSONALLY

PROFESSIONALLY

What would have to happen for this to be a regular occurrence?

ENERGY LEVELS

Create a list of things that energize you and a list of things that make you exhausted.

ENERGIZING

EXHAUSTING

What would have to happen for you to spend 90% of your time on energy-creating activities?

WISHES & WANTS

Make a list of things you would like to add or remove from your life right now. What will need to happen for that change to occur?

+ / - _____

+ / - _____

+ / - _____

PERSONAL SUCCESS

What does personal success look like for you?

(Think self, relationships, community, causes, lifestyle, health, spirituality, etc.)



PROFESSIONAL SUCCESS

What does professional success look like to you?

(Think career, role, time, relationships, experience, impact, exit planning, etc.)

ORGANIZATION & PEOPLE STABILITY

What does success look like from a people perspective?

(Think organizational structure, size, capabilities, skills, culture)

OPERATIONAL EXCELLENCE

What does success look like operationally?

(Think platforms, technology, systems, processes)

CLIENT SERVICE & PRESENTATION

What does success look like from a client base perspective?

(Think target client, fees, segments, services, client experience, value perceived, etc.)

BUSINESS GROWTH

What does success look like from a growth perspective?

(Think growth rate, brand positioning, sales pipelines, marketing channels & sources of business, who generates/manages, etc.)

FINANCIAL RESULTS & IMPACT

What does success look like from a financial and impact perspective?

(Think revenue growth, profitability, community building, social impact.)

KEY DIFFERENTIATORS & OPPORTUNITIES

What key differentiators set you and your firm apart from the crowd?

What opportunities can you identify as a result?



5 Define Your 5 Big Moves

IDENTIFY IMPACT & EFFORT

Using the Impact and Effort matrix example to the right, identify potential activities by priority. Clarity here will help you identify your 5 Big Moves.

HIGH IMPACT / LOW EFFORT

HIGH IMPACT / HIGH EFFORT

LOW IMPACT / LOW EFFORT

LOW IMPACT / HIGH EFFORT

WHAT ARE YOUR FIRM'S CORE CAPABILITIES?

List the firm's core capabilities that can be leveraged to support the vision.

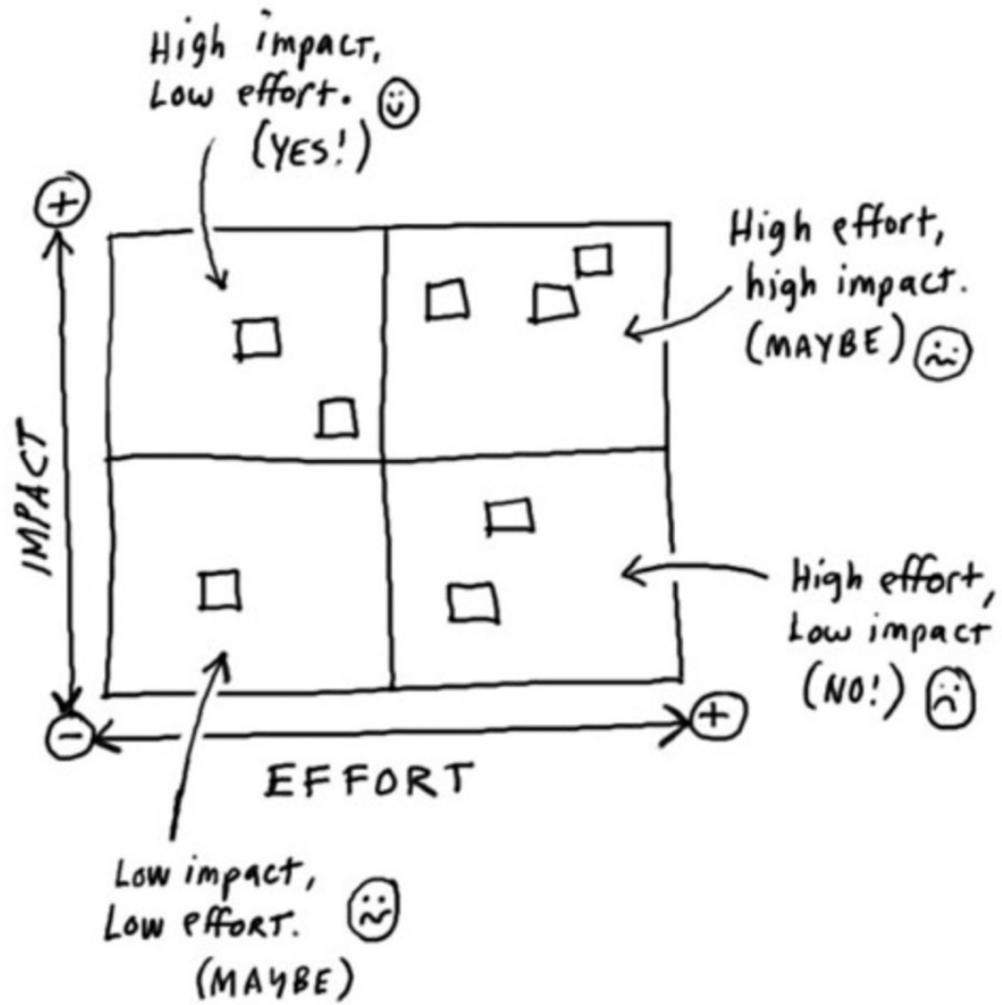
WHAT HEADWINDS ARE YOU FACING?

Make a list of all the headwinds you are and/or will face as you work toward your goals. Consider the market landscape, competition, trends and areas of the business that need attention.

WHAT ARE YOUR NEXT 5 BIG MOVES?

Take time to evaluate the actions you can take to move toward your goals. Brainstorm all the possible ideas and options for taking action toward your goals. Then identify, describe & define the impact of the 5 Big Moves you can take to achieve your goals.

The image shows five vertical sticky notes arranged horizontally, numbered 1 to 5. Each sticky note has a light gray body with horizontal lines for writing, a teal-colored top tab, and a teal-colored bottom-right corner. At the bottom of each sticky note is a white circle with a teal outline. The text 'Positive Impact' is written vertically along the left side of each circle. The numbers 1, 2, 3, 4, and 5 are printed in white on the teal corner of each sticky note.



Vision Statement Drafting and Refinement Zone

A large, light blue rectangular area with rounded corners and horizontal white lines, intended for drafting and refining a vision statement.



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