



## Session Guide

# Craft a Vision

A compelling vision can inspire teams and organizations to do more than they ever thought possible. At its best, a vision can serve to clarify priorities, foster better decision making, and create passionate commitment.

At its worst, they can be laughably long, filled with corporate jargon, or even misrepresent the true interests of the organization.

The goal is to dream big enough - and catchy enough - so that others will want to join your cause. Whether you're a non-profit or financial institution, humans long to be a part of big, important things.

Gather your team to complete this activity.

**Try your best to adhere to the time restraints.**

**The times are meant to encourage action over deliberation.**

# Craft Your Vision

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25  
MINS

## 1. Reflect on your organization

**10 mins reflection + 15 mins share**

Working individually, answer the questions to the right. At the end of 10 minutes, each team member shares their answers with the group. Ensure everyone has a chance to share.

As others share, circle any words or phrases that are similar to what you have down.

Write down any new words or phrases that resonate with you as well.

**Who are our users/customers?**

**What problem do we solve for them?**

**What is our signature and unique capability?**

**What makes us different from our peers or competitors?**

**Write a few sentences about the world you hope to create. What difference do you hope to see as a result of your work?**

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15  
MINS

## 2. Ideate

10 mins ideation + 5 mins share

Now it's time to draft a vision statement...or several. Using the insights from the previous step, craft three unique vision statements. Don't worry about editing or finding the best words, just get three distinct ideas down.

Remember, a vision statement is a description of the future you hope to create. It should be aspirational and inspirational. To get started, try finishing this sentence...

***Imagine a world where***\_\_\_\_\_

At the end of 10 minutes, each participant chooses their best statement and writes it on the board. Read through all statements.

**Vision #1**

**Vision #2**

**Vision #3**

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MINS

## 3. Refine and Commit

5 mins voting + 15 mins rewriting  
and discussion

**Vote for your favorite:** Using a marker, each person draws a circle next to their favorite vision statement. After votes have been collected, read the winner(s) aloud.

Is there a way to combine the best elements from the top votes into a single statement?

Rewrite one last version if needed. Can everyone commit to this version?

Final draft

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## Finalize and Pressure Test

At this point, if you have a clear and compelling vision statement - congrats!

If you're like most teams, your vision may be a little boring or unfinished at this stage. This is okay. Most teams can get 90% of their vision created as a group, but it requires the final say of a leader or a passionate copywriter to push it the last 10%. Sometimes this can take a few more iterations and is better suited for a separate, smaller working group.

Have one to two individuals take on the project to finalize and communicate the vision to the team, ensuring not to lose the key elements from the team session.

Once you have a version that feels good, test drive it in meetings and with stakeholders. Refine as needed until your message feels right and resonates with others.