

Facilitating a Vision Day: Creating the Vision and Purpose

I approach this exercise with the greatest reverence and honor to infinite intelligence. I wish to state, "I honor the infinite intelligence of God and the Great Mother for all that I am and all that I be and all the thoughts and feelings that come to me. I totally release myself to the infinite intelligence of God and the Great Mother, the cosmic dancing Mandela."

Of all that we do for the client, the item that has the strongest impact is the creation of the Vision and Purpose for the company.

It is here that we enter into a different realm and reality. As the Mastermind Consulting Network, Inc. Vision states, this is where we link directly to our source "by connecting to truth and virtue, accepting our place and purpose in the dynamic evolution of the universe." It is not that our clients need to know what is happening here. They can feel it, see it, are transformed by it and therefore it exists in body, mind and soul. I approach this with great reverence and awe, for we are now using a tool sent to us sight unseen that truly transforms all that touches it. Totally committing to your Vision and Purpose is the last act of releasing yourself to the divine.

Mastermind Consulting Network, Inc. mentor, Doug Hood, felt that "We all have the ability to connect to the source in our own totally unique way." It is here that we reach our fullest potential. Emerson constantly says, release yourself, totally allow what flows through to come and it will be easy and sweet for all touched by it. "We are bound by spiritual laws that execute themselves." The Vision Day is the highest form of ritual. To gain a good Vision you must release yourself and the group with faith that the truth will come. All control must be released. Directly feel the infinite intelligence flowing through your Mastermind. Unless you begin with faith, you cannot touch the divine realm and connect to the truth. Total faith leads to a trance-like state that opens a direct connection to infinite intelligence, permitting the flow of thoughts and new ideas that come from sight unseen.

The Vision is not a mission, not a statement of where we are now. It is a statement of where we will be in 10 years (stated as if it were now). By saying it this way, it happens. By believing, it happens. Emerson said that

we know the truth because we can tell it is the truth: we hear it and know it is true.

When we do the Vision Day, while we may appear to be in our business suits, we are really in our shamanic robes. We are descending with our clients on the night sea journey.

The value of the Vision is its enormous dark side. Those that do not believe or follow the Vision and Purpose, who do not walk its talk, cannot be a part of the company. The Vision and Purpose seeks and sifts out people in the organization that do not serve its great purpose. This does not mean that the negative people in the organization will all leave. Some people who are highly dysfunctional and critical may stay, helping the organization get better by the truth they present. They, as devil's advocates, are aligned to helping the Vision become a reality by challenging the organization's right to exist under the Vision. Those not connected to the Vision and Purpose from the standpoint of true dedication to making it happen, do tend to leave once the Vision starts to become a reality.

The great darkside of the Vision and Purpose is that its path will be followed whether all in the organization -- the owner, leaders, and team members -- want to follow it or not. The magnetic pull toward the Vision and Purpose cannot be resisted consciously or unconsciously. The path leading to the Vision is beyond the strength of human resistance. Leaders will find that it is their people, not themselves pulling them toward the Vision. The connection to the source is divine and unalterable.

All decisions, all impulses followed go first through the Vision and Purpose. Does this action, deed, idea support the attainment of the Vision and Purpose? If so, Yes! If not, No! The company owner/president is the key protector and supporter of the Vision and Purpose. With the Vision and Purpose in hand, he or she dances in the chaos to bring order and harmony, and then jumps back into the chaos again, much like King David danced in celebration -- dancing the four corners.

Selling the Vision Day

Inside all people is a desire for direction leading to the path of the divine. There is an internal need among the organization's people to know the direction the organization is going. In most initial interviews with employees, the main complaint is "We do not know what they want and

where the company is going." Team members do have a right to know where their company is going. The fact is, however, that without a clear Vision and Purpose, the owners themselves may have little inkling. This question can best be answered in a divine mastermind.

Ideally, the Vision should be sold as the first item on the agenda as we start working with the company. Those that begin by creating the Vision and Purpose tend to become long-term clients.

In the initial interview with a client, the consultant may sense there is a lack of clarity in the company direction, showing the need to define the Vision and Purpose. The client may talk in terms of the necessity to get his people going in the same direction, and that currently people are not working together toward a common aim. The words "direction", "aims" and "common goals" come up when people are asking for a clearly defined Vision and Purpose. This need, this desire, this calling from the company leadership must be heeded.

To sell the Vision and Purpose you can tell the owner:

1. "The Vision Day, Mr. Owner, allows all to give equal input into the ten- year future of the organization. Like geese flying in formation, people are pointed in the same direction."
2. Show them the Vision triangle graphic. (See graphic at right.) Tell them, "The Vision and Purpose is worth its weight in gold. It will have more impact on the organization than anything else we do." Tell them stories of companies that have used the Vision. Some companies post their Vision throughout the company.
3. Talk about your success stories: For example, one of our client companies that has posted the Vision throughout their facilities has grown by 20% per year for the past six years, tripling their productivity. Another one has achieved 500% growth. As examples, use your own clients or, if you are just starting out, talk about large national companies that have Visions. Point out that they have achieved these results because they have clearly defined their Vision and Purpose.
4. Explain to the client that the Vision also becomes a problem-solving tool for the owner. Once you know the direction you want to go, it is much easier to make good decisions.

5. It also becomes a great recruiting tool since all people want to know the direction their potential employer is going. You can recruit worldwide with a good Vision and Purpose.
6. Once you have defined the Vision and Purpose, you can set goals that will contribute to the desired direction. The Vision and Purpose defines the culture of the organization. The Vision and Purpose is the single most important paper you will ever have about a company. Sell the Vision Day in these terms and the clients will do it because of your belief, your enthusiasm, your conviction and because it feels right. They cannot resist.
7. While you are telling the client all of this, look for buying signals. Is the client nodding in agreement, or saying "That makes sense" or "That's true"? If this is the case, the client is sold and it's time to get started. There tends to be a forward momentum towards creating the Vision and Purpose, and it is your job to be the spark plug that gets it going. At this point, the close is very simple: tell the client what the initial steps of the process are, and have them schedule these on their calendar: The first step is to distribute the Vision Day handouts to team members. The second step is to schedule the actual Vision Day.

The Vision and Purpose Handout

The Vision and Purpose handout is four pages: our standard two pages of Vision and Purpose questions, one triangle leaflet, and one leaflet defining clearly the Vision and Purpose and its importance. (Please email us for information on obtaining this Handout.) Ideally, arrange a one-on-one appointment with each team member to fill out the Vision and Purpose handout. Generally, this presenter does not attempt to differentiate between the Vision and Purpose material in terms of what is written down on the handout. This is because the presenter has both pages read aloud together in his Vision and Purpose day group meeting. The key in this brainstorming process is to avoid interrupting the flow of ideas.

Arrange a meeting with each team member, allowing 45 minutes to an hour per meeting. In a budget situation you can use a group approach, meeting with a small number of team members at one time. It is good to distribute the Vision and Purpose handout at least two weeks prior to the actual meeting, so they have time to complete.

In the Vision handout meeting, first have the team member(s) read what they have written, one section at a time. Initially, they may seem shocked that you want them to read out loud what they have written. Tell them that this is what they will do at the group meeting and this may startle them too. By reading their Handout aloud, they will hear their own voice and connect to their own truth. As they are reading, listen carefully and build on each area they have brought up. They must immediately write down any new ideas, phrases, explanations, etc. By writing this themselves, they will take ownership of the ideas. It is important to resist the temptation to write the notes for them. Speaking the idea and writing it down themselves makes it real.

The goal is to gain a full catharsis, with all ideas, feelings, hopes and concerns unloaded into written form. A good question to use in all sessions is, "Why is that important?" This question helps build emotion with the team member. The more emotion they experience in this process, the more easily the ideas will flow and the deeper will be their connection to the Vision and Purpose. "Emotion is the moment when steel meets flint and a spark is struck forth, for emotion is the chief source of consciousness," Carl Jung.

Have your participant speak the ideas and write them down. Allow your participant to get into the emotion of the moment. You and the participant(s) will unite quickly in a mastermind relationship. Listen for what they say and have them write it down. Capture all the emotion and logic of their thinking. Dig deep into frustrations, fears or jumps into divine fancy. Get it down on paper. Use the other side of the sheet. During this process, the consultant may become an active participant. As ideas or phrases come to you, state them out loud. Ask if the team member agrees and suggest that they write these ideas on their handouts. Whatever comes out of any Mastermind and any situation are owned by all the people. Participants always leave amazed at how much they have written. It is here that a trance-like state occurs, here that they connect to the divine.

Once you are done capturing the spontaneous ideas the person has come up with, go through the items listed on the Handout to prompt discussion of other areas that need improvement. Go back through the items they listed for themselves and see what new insights come out of discussing them.

Here we are looking for a spontaneous flow of ideas. Your role is to allow the ideas to pour out. Later, when they are read at the Vision Day, they will

again take on a life of their own. Always ask, "What else?" "What else can you think of?" If the ideas continue to flow do not stop them. Hear the great sound. You will work with people who are illiterate or reluctant to write things down, and you will have to be their secretary. (They will like this a lot.) In some cases there will be anger: some people will be so angry that they will refuse to write anything down. Be their secretary. Again the goal is to get it all on paper, especially the swear words. (This tends to loosen the group up.) Within the first five interviews, you will get a feeling for the dysfunction of the organization, the level of frustration, the level of fear, anger, and disharmony. You will begin to see what must be included in the Vision and Purpose.

A good Vision and Purpose exposes great secrets. Where is management falling down? What values do we wish to include in our Vision? What is not happening that is killing the success? All this must be noted and shared in the Vision and Purpose positively, as if it has already occurred. To read the Vision and Purpose on the negative plain is to read a true list of the most serious weaknesses and failures of the organization. Use your one-on-one or group meetings to fill out the Vision and Purpose Handout and create a soul alignment with yourself and the team members. They have shared their deepest concerns with you, revealing the true power and potential of the organization, and aligned themselves with the process you have started. They are now ready to go on the night sea journey into the chaos and with faith come out okay, better and alive.

We are now ready to conduct the Vision and Purpose Day with the entire organization. Set a date for this in advance with the owner, providing lunch or dinner in an atmosphere of privacy and intimacy. Allow at least six hours to truly get the job done in one session.

The Vision and Purpose Day

Tools:

Large marker boards, preferably with erasable markers. Start with "Welcome, (Client's company name) to the Vision and Purpose Day year" written on the board. Colored washable magic markers, fine tip, 2 per participant Index cards, or regular paper cut in fourths, at least 50 per person

The agenda of the Vision and Purpose Day is simpler than the Goals Day. Generally the facilitator heats up the minds of the participants with a short

motivational talk concerning the importance of the day. For example, you may say "Today, we decide the future of our company. Today, united as one, we form a mastermind of perfect harmony to define our weaknesses and set a path to build on our strengths..." Be spontaneous. This presenter prefers to write notes for the talk just before the program begins, or even at the program itself (for example, during the meal). Allow yourself to use dangerous words since your speech should be a bridge to the divine trance. Come from the heart -- say it and then start the process. In some cases it may be appropriate to have the owner or another presenter give a short speech, however, this is not a necessary part of the day. After this let the Grand Mastermind begin.

Use a fast-paced, enthusiastic, high energy style. Keep the ideas flowing; make it exciting and fun.

Before the participants start reading their Handouts, tell them to use the note cards to write down everything that comes to mind, even thoughts not at all related to what the reader is saying. Emphasize this again and again. At this meeting the single, primary goal is to get hundreds of ideas in writing to be used to create the Vision and Purpose.

Then have all of the participants, one by one, read everything they wrote on both the Vision and the Purpose sections of the Handout. (You may choose to separate the readings from the two sections; this presenter does not.) Frequently remind the group to write down everything that comes to mind during these readings.

As people read, ask probing questions to get to deep insights that can be captured on the cards. If, for example, a participant says "We need more motivation", ask "What kind of motivation?" and "How can we become better motivated?" Always ask the hard questions. Periodically, check to see that people are writing down their ideas.

The Structure of the Vision and Purpose

The Vision must include these elements to be successful:

- A. What kind of growth does the company want? Fastest? Most profitable? Controlled?
- B. What does the company consider its geographic area? World-wide? National? Regional? State-wide? County-wide?

- C. Within their chosen area are they the best? The highest quality? The most successful? The most profitable?
- D. The Vision must include what is to be required of the team members: Enthusiasm? Harmony? Cooperation? Ideally, it should also include what the team members will gain through their participation. (WIIFT - What's in it for them?) Organizations cannot grow without the cooperation of the team members.
- E. What is required of management? Do they need to increase the recognition they give to team members for a job well done? Do they need to better hold people accountable?

These questions are crucial since we need to understand the aim of the company in these areas. As a consultant, you essentially are forcing them to clarify their position.

Defining The Vision And Purpose

Once all team members have read their handouts, it is time to have them select items to be included in the Vision and Purpose. You might say, "Please pick out the top seven ideas you feel we must include in the Vision and Purpose. Pick out ideas that truly inspire you." Give them five minutes to do so, and then go around the group and have each team member read their ideas. As they read their ideas, your role is to put them in very condensed form on the marker boards. Leave one marker board blank and use the other for the ideas. You will have to write small and you at least should be able to read them. Do not repeat ideas unless they are specifically different. This consultant puts a checkmark next to an item each time it is repeated, pointing out the areas of greatest interest and acknowledging each repetition by other individuals.

Once all of the ideas are on the board create the Vision.

The Vision generally begins with the company name, followed by statements concerning growth, profitability, and geographical position. For example, "XYZ Manufacturing is the fastest growing, most successful, independent fabricating company in the United States." The focus here needs to be on the company's position in relationship to what they see as their marketing area, e.g. "Mastermind Consulting Network, Inc. helps one hundred million people a day worldwide."

The issue of growth is probably the most critical for the company's future. When you establish growth as a goal (or decide that it is not a goal) you are defining the company's will to power (their drive to dominate). A company may not need or want to become number one in the world or even in any particular market, and this is perfectly fine. You should quickly sense the general attitude of the participants concerning this choice. Few companies have a great will to power; but you need to get them to clarify their choice to be the fastest growing, one of the fastest growing, or simply a growing company in their industry.

Simply defining what the company does is extremely important. The definition of what the company does may be very specific, "We process tomatoes for the wholesale market." It may be quite abstract: for example, the Mastermind Consulting Network, Inc. Vision, says that "We help people to achieve the goals they have chosen, through inspiration from their source." The Vision defines the unique place the organization and its members play in the universe.

Defining this may come easily, or may be very difficult. This may involve a drastic change in the way the company thinks about itself. For example, widgets may no longer be profitable, but it is difficult to abandon the product that founded the company, so it is difficult to change from "We manufacture widgets and screws" to "We manufacture screws."

Other issues to be included in the Vision may be: (1) profitability and how employees or team members will benefit, (2) marketing stance, (3) how you define quality, (4) productivity aims, (5) encouraging enthusiasm in team members, (6) other key issues that have come up.

The Vision in One Sentence

The Vision must be a one-sentence statement. It will be a run-on sentence, but if done correctly, it should be very effective. We dogmatically insist that it must be a single sentence because it is absolutely necessary to express the continuity of the Vision as a single, universal, unified statement. In the frustration of trying to distill so much into one sentence, your client may ask, "Why not two or three sentences for the Vision?" It is vital to resist heeding this call because as more sentences are used, the easier it is to lose the focus. In forcing them to distill their essence into a single statement, you are helping them become extremely clear about who they are and where they

want to go. This should be phrased in the present tense, for example, "We are the largest," or "We are the most profitable." You will have to keep reminding them that the Vision is to be expressed not as a future hope but as a reality.

At this point, the single-sentence statement may be rough and awkward. Now it is time to work for a poetic realization of the Vision statement. There is a feeling that tells you when this has been achieved: You read the Vision, and it inspires. It may be a struggle to keep the group going here, since they may be tired of working on the Vision statement after getting it to this point, but it is worth the effort to continue. The best Visions are complete, leaving nothing more to be said. Like the selection of the next Dalai Lama, the message from the source has become complete, real, and unalterable.

Creating the Purpose

For some reason, the generally four-paragraph Purpose is created as fast as the one sentence Vision. It seems that the Vision, once clearly defined, gives birth quickly to a well stated four-to-five paragraph Purpose. The Purpose may be started when the Vision is almost complete.

The Purpose is generally a group of paragraphs, each addressing a particular theme. These may include:

- A. Our marketing approach.
- B. Benefits to our people.
- C. What we ask of our people.
- D. Key policies and procedures.
- E. New technologies we want to use (e.g. The Purpose statement of Mastermind Consulting Network, Inc. includes databasing and the using the world wide web).
- F. How we work with suppliers and other key partners in our success.
- G. How we define quality: many manufacturers will include a commitment to QS and ISO 9000.
- H. Any other key areas you want to include.

On the marker board, erase all items that you have used in the Vision and leave the remaining items to be considered in creating the Purpose. As with the Vision, the Purpose is written in the present tense (as if it has already become reality). When you start working on the Purpose, address each major issue, gathering together the items related to it. For example, people

frequently express a concern that the company is not clear about what they expect. This theme is often a good place to start in creating the first paragraph of the Purpose. For example, one corporation begins with: "At the XYZ Automotive Group, our dealerships, departments, and team members are united as one. We obtain total customer satisfaction through open communication and a positive attitude -- seeing problems as opportunities." One of their key challenges was getting people in multiple dealerships to work together as a team. When we started, there was a lot of bickering, finger pointing and blaming. Thus, in this section of the Purpose we simply list key characteristics we wish to see in ourselves and our people.

Say, for an example, to survive and prosper an organization must become more aggressive in their selling. Group brainstorming has come up with these words and phrases: "Close," "Sell hard," "Ask people to buy," "Deal with stalls and objections," "Sell more," and "Sell more aggressively." As the facilitator you could help create a sentence like this: "Our associates increase sales by always asking the customer to buy, and dealing with stalls and objections. We do what it takes to gain long term customers in increasing numbers." On the board, write the sentence as it comes to you, using as many related words as possible. Then read it out loud and ask, "What do you think?" In most cases people suggest other words, other ways of making the sentence work. This is when the mastermind truly kicks in.

In this brainstorming phase, each participant may come up with many phrases -- some may even write a whole paragraph. This is a literary exercise. Rapidly get down a rough draft of each paragraph. Once one paragraph is done go to the next. The goal in this process is to include all key words and phrases listed on the board somewhere in the Purpose. In the process of this group editing, you are creating a true catharsis so that in the end you can ask, "Is there anything else?" and there is no more.

A successful Vision and Purpose Day will leave the company with good rough drafts of their new Vision and Purpose. Schedule a second meeting to work on them. At that meeting, distribute the rough drafts, and work on refining and polishing them. Generally, there will be two or three more drafts before you are finished. Ideally, this will also be done as a group, but you may work with a smaller committee or with the owner.

You are now into the more poetic part of the process. At this point, read the Vision and Purpose aloud and ask the group or owner, "Is that it?" If they

say yes, ask: "Are you willing to walk over hot coals and crawl through broken glass to make this happen?". This is more than a hypothetical question. You need to work until the Vision and Purpose are a very clear statement of what the company wants. You must have an intense level of commitment to making this a reality. Continue working until you achieve this. Ask point-blank questions to make sure that what you have created inspires the team members to this intense commitment; if not, find out what needs to be added to achieve this.

A great Vision and Purpose is one that a person will give their life for. A true warrior has a Purpose more important than life itself. As the great chief Short Bull once said, "Today is a good day to die". The power of the Vision and Purpose should inspire life's force.

After the Vision and Purpose Have Been Written

Now your objective is to bring the Vision and Purpose into the life of the company.

- 1. Post the Vision and Purpose on the walls of the company.**
- 2. Have the Vision and Purpose read out loud at every company meeting.**

To force the issue, get them to set a budget to have the Vision and Purpose beautifully framed and posted throughout the company, as well as distributing copies to everyone.

Your role as consultant now shifts into working with the company on a long-term basis to make the Vision and Purpose a reality. This is where the fun truly begins.