

The Vision Challenge Workbook

A six-day introductory course of vision-telling tools
within the functional approach to leadership.

by ReDefine, Inc.
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Introduction

Let's start envisioning.

Welcome to the Vision Challenge.

Vision is the foundation for all leadership activities, and one of the three functions of leadership. When we share the story of vision, we do several powerful things within the organization:

- We show the members of the group - staff, employees, volunteers, whomever - how their specific tasks contribute to a meaningful change in the world.
- We call for excellence from each member and create a way for members to call for excellence from each other.
- We allow the members of the group to create personal identity and build community based on their meaningful work.

Our ability to tell the story of vision is a responsibility of leadership. If we miss the mark, we will end up with an inferior product and unengaged employees. We will also find doubt and concern distract us from our own managerial tasks. No other members of the group have this responsibility.

The next six days are going to give you a set of tools that create shared vision within any group. Each section of this workbook is designed to fit into one workday, with a final day of reflection on Day 6. Each section contains a little bit of reading and one of ReDefine's unique SEEING EXERCISE.

These exercises reveal some aspect of vision within your organization. While we call these exercises, they are actually practice for the analysis and evaluation you perform to be an effective functional leader. You have to do the exercises. If you don't do the work, you won't get the results.

The exercises are not hard, and you will use them over and over again in your career. I can't say this enough; you can't just read this workbook and forget about it. You have to apply it to your real-world situation. This is different from other leadership development programs, but it is a more effective, long-term way to learn.

But there's something in it for you!

Once you complete the six days and six exercises, you will improve your ability in the following ways:

- You will know the words of your organization's story of vision, and you will know where to find more and better words in the future.
- You will see the effect of vision on the work quality and engagement of the organization's employees, both good and bad.
- You will be able to identify deficiencies in vision and will have at least one concrete action plan to improve the quality of work.
- Most importantly, you will have a basic understanding of the function of vision, and will be able to build upon that to improve your leadership practice for the rest of your career.

That's enough from me for an introduction. The vision challenge starts with an introduction to the story of vision and an exercise to identify the first two factors of vision, *the change* and *the worth*.

Phil

Day 1

Vision starts with a change.

The change is the first of the five factors that make up a leadership vision. It describes the physical difference in the world that takes place because of the product or service your company makes. This could be anything, and the same concept applies to non-profits, volunteer groups, or social organizations. It even applies to political movements and societies. This change is not merely a decent output, but the one that is created when your group does every task with excellence. It is the best that can be made.

There is a reason that the change is valuable to your customers, and it is the second factor of vision: *the worth*. The worth describes the human value that is gained through the physical change. Your customers like your product because it does something good in their lives; the worth is how you explain this value to your employees. When the organization makes its product or service with excellence, this value is delivered to your customers.

A Worthwhile Change

The change and the worth are the beginning of a story that explains why members of your organization should be excited to come to work, perform their tasks with passion and dedication, and go home proud of their jobs. When the organization makes its product or service with excellence, this worthwhile change appears within the world. It is literally brought into being through the efforts of the group. This story allows each person to find meaning and value in

their work, feelings that satisfy a human need like food and shelter. Because they describe excellence, the change and worth create a goal towards which the members of the group will strive.

We do not create this story by ourselves, though the change and worth are often an idea in which we are highly invested. Rather, we find the words of these two factors by listening to our customers. The story of vision works not because it is told, but because it is heard and understood. As leaders, we have to tell this story to the members of the group until it becomes a shared understanding. Each member does not experience them in the same way that we as leaders - or customers - do.

There are three additional factors that connect the efforts of each member to the worthwhile change, but we will explore these tomorrow. For now, the following SEEING EXERCISE reveals the change and worth for your organization.

Seeing Exercise

FINDING THE CHANGE AND THE WORTH

Watch and listen to your customers at work. Find the answers to the following questions from their perspective. For this exercise, only consider customer experiences that are excellent. Your goal is to create outcomes that are consistently excellent, so ignore those that are average or worse.

The Change

- What is the meaningful change that your group creates when it performs with excellence?
- What is physically different in the world when members complete their work and provide it to a customer?
- What is physically different in the customer's life?

The Worth

- How does the change make the customer's life better?
- What value do they find in the group's work when they

receive the excellent product or service?

- What can they do or feel now that they did not before?

Excellence Exemplified

Think of a single customer experience that captures all of the change and worth. Imagine this as a story, where you described the customer's interaction and feelings from the time they first encountered your organization through the full use of the product or service. Stories are more powerful than commands or requests, and this story communicates the first two factors.

- What characteristics would the most excellent product or service have?
- How would it be different from average or poor outputs?
- How would those characteristics impact the life of the customer?

These questions should get you an answer to the following:

| What worthwhile change does the customer experience when they receive an excellent product or service from your organization?

Day 2

Invite your people to be excellent.

In the first exercise, we established the characteristics of an excellent output (product or service) and how it creates value in the life of the customer who experiences it. This is a meaningful and positive thing to do, and it is worth doing well.

So far, this has been a pretty normal business school exercise about product value and such. Here's where we are going to get into real leadership.

The next chapter in the story of vision is to understand and explain how each member of the group contributes effort to make the worthwhile change become real. To do this, we need to show that the group can accomplish this excellent output and that each individual task contributes to the group's success. When we connect the worthwhile change all the way to individual tasks, we allow members of the group to see their roles in creating excellence.

To do that, we add two more factors to the story of vision. The third factor of vision tells *the possibility* that the group can succeed. This is the way that the group as a whole works together to make excellence. It describes the characteristics of work that produce a perfect customer experience. It also describes the plan to produce that outcome. When we explain the nature of the group's work when it is creating excellence, we are also describing what the group as a whole needs to do to be successful.

The fourth factor is *the individual contributions* that make up

the whole. These contributions are specific to each individual role or position. Like the possibility, individual contributions describe the characteristics and the plan for each person to contribute to making excellence become real.

When individuals can see both the specific of their work and the overall effort, then they understand what the group - and therefore the other members - have to do, and they understand their portion of the whole. These four factors of vision describe a path to a worthwhile change in the world. The four factors we have explored so far connect an excellent outcome to individual efforts. This connection explains why the work is worth doing well.

Seeing Exercise

CONNECTING TASKS TO OUTCOMES

Consider the excellent output we described yesterday - its characteristics and impact - as you identify the process that the group as a whole and individual members complete to produce that outcome. Thinking about the exemplary product and its characteristics, consider the tasks that produced that output.

- In what form does the product truly accomplish the change and worth?
- In the past, what are specific examples of the group producing this level of excellence? Think of a specific story.
- In general, what characteristics exist within the group's combined processes and individual tasks when the product is excellent?
- In what manner do members complete their individual tasks and combine them with others' tasks to make this exemplary output? How is this different from a low-performance day?
- What is different in the feelings and behaviors of members that lead to high performance, as compared to when they are struggling?
- What does the group's process look like when they are performing at a high level?

As you interact with and observe individual members of the organization, consider each person's contribution separately.

- What is this person's individual contribution - how do his or her tasks lead to (or prevent) the excellence in the group's output?
- Does this person's choices demonstrate that he or she knows the connection between his or her individual contribution and the group's success or failure?
- Are both the group's possibility and the individual's contribution clear to this individual?

These questions should get you an answer to the following:

| What does the members' work performance look like when they produce the meaningful change for the customer, both as a whole and as individuals?

Day 3

Every story needs a storyteller.

In the last two days, we have explored four of the five factors of vision. These factors make up a story that connects individual members' work efforts to the worthwhile change for the customer. When we tell this story, we create the understanding that the members of the group need to accomplish excellence.

This sounds simple, but there are two problems. First, employees of your organization experience their work differently than you. They see and understand their output in the context of their portion, not as the final whole. Second, humans have a natural tendency to focus on immediate tasks and activities, and so they forget the abstract, less immediate impact of our work on someone. As a result, we as leaders must give the members of the group an understanding of why and how their work matters.

We do this by telling the story of vision. This is a unique role; nobody else in the organization is responsible for this but those who chose to lead. When we communicate the story well, then each member will have a shared, common understanding of why the work matters.

But there is a challenge: we don't get to pick how we tell the story. We have to tell it in ways that the people listening can understand. Our favorite way of talking may not be how each member wants to listen. For example, we might lecture or chastise when the product is not excellent. But our employees hear better when we talk with excitement about positive customer experiences, not with anger about negative

ones. They can turn that form into excellent work more easily than a criticism.

The following SEEING EXERCISE shows us how the members of the group make meaning, and compares our preferred form to tell the story of vision. If these two do not match, we need to find a new form of storytelling.

Seeing Exercise

MEANING-MAKING AND FORMS OF STORYTELLING

Think of a time when you observed the members talk about their work in a positive way.

- When did the members of the group talk with pride about their work?
- What words did they use when they tell these stories?
- What events or circumstances triggered them to feel this pride, and which events or circumstances did they feel able to share?
- Do these moments relate to the customer or to other members of the group?
- How do these individual tasks connect to the successes they describe in their stories?

Now think about how you have talked about the five factors in the past. When you expressed what you now know are the change, the worth, the possibility, and individual contributions:

- When do you talk about the five factors with your employees?
- What actions do you use to show them that their work creates a worthwhile change?
- What content do you put in your story? Are you telling a specific customer's experience or talking in generalities?

- What circumstances make you tell the story? Are they good or bad, stressful or relaxed, individual or group?
 - When do these stories work? How can you tell - what is different in the group's process of work?
 - When do these forms not work - when do they not produce an improvement in performance?
 - What other forms might you use? What other stories might you tell?
-

These questions should get you an answer to the following:

- | What forms of vision-telling allows your employees to best hear and understand the story of vision?

Day 4

Don't leave them hanging..

We have established four of the five factors of vision, and we have explored the forms of storytelling that work. At this point, we are ready to jump to the next level... connecting this rough-draft story of vision to leadership as a practice.

The basic understanding of vision we have established so far shows us why the functional approach to leadership calls vision a function.

The process of making meaning of work occurs in the members of the group all of the time. When people don't have guidance from leadership, they do so based on their individual preferences, desires, and energy. If we let this happen, then people will strive for excellence only when they see a personal benefit to do so.

Literally, they will decide how to perform their duties based on what's easiest, or most convenient, or what they like doing most - and not on what makes the best product or service. We see this in the nature of their decisions: they work towards a standard other than excellence. These are often effort, comfort, familiarity, power over others, or self-advancement.

Creating a shared vision through the story and the five factors replaces these individual visions, which is why it is so important. Without a shared vision, members of the group do not have a way to decide what's best in any situation. The story of vision tells them, "This is what you should be doing." It does so both as an excellent final product, and as

the steps to accomplish that output. These are the factors put together, see?

When the group has a complete, shared story of vision, then we as leaders can build relationships - the connections between people that allow individual tasks to be performed, which are also the second function of leadership - that produce excellence. But that's for another challenge. For now, we have to recognize that leadership depends on vision and other leadership functions in action. The goal of this SEEING EXERCISE is to reveal holes in your employees' understanding of the story of vision so that you can figure out how to fill them.

Seeing Exercise

FINDING THE MISSING FUNCTION

When a member of the group does not understand one or more factors of vision, then he or she is unable to share the vision. We see this lack in the work product of a member. The decisions that these members make are directed towards individual, rather than group, ends.

- When is vision lacking - when do members resort to individual visions?
- What other standard are they using to make their decisions - effort, comfort, familiarity, or another?
- What impact does this have on the individual's work output? On the quality of the final product or service?
- How do these decisions affect other members of the group and their work products?
- How could the group's process and product be better if it did not happen?

These questions should get you an answer to the following:

What missing functions are preventing any individual member from performing with excellence?

Day 5

Is your belief the weakest link?

So far we have talked about four of the five factors of vision. These four make up the story that connects individual work efforts to a worthwhile change in the world.

There's one factor missing: our belief as leaders.

Our belief is an overarching factor. It covers all four of the other factors.

Here is why belief is important. To be committed and engaged with an effort, every human needs to know why. This is both the meaningful outcome, and the path to get there. Vision, in other words, provides a goal and a way to achieve that goal.

But the world is a difficult place, and human beings lose sight of these things. Often this happens in the heat of the moment, when there are other more pressing things to think about. This is why leadership is responsible for telling the story of vision: to remind people of what's important.

But sometimes humans lose sight of the vision because they have doubts and fears. We question why work is worth doing or worth doing well, we don't want to struggle and we don't want to deal with it. We hate our jobs and we just really want to quit. There's no way we can be productive, much less excellent, when we are in these mental spaces.

Leadership, and the story of vision that leaders tell to the group, offers a solution to these moments. We believe in our people, and in what they can do. We want them to succeed. We

are right there alongside them when things get hard. We fight for them. This is the final factor in a complete story of vision.

Belief is often tied to vulnerability. As leaders, we have to show that we are human, that we have doubts, and that we struggle. This is true, of course, but vulnerability allows the members of the group to accept their own feelings. Once that happens, then the story of a worthwhile change can bring the group together to do something important in the world. This is how vision creates identity and community within the group.

This is as true for us as leaders as it is for the member of the group, by the way. We all, at times, lose sight of our vision and get stuck in a dark mental place, too. Because we have the responsibility of leadership, there is nobody else to remind us of the story of vision in our lives. Fortunately, the five factors of vision work just as well for us as for anyone else.

Seeing Exercise

Vision as a Source of Strength

Think about your own experiences with doubt, struggle, and fear. Consider a time when you lost sight of your goal or your ability to succeed, and how this lack of vision affected you.

- What circumstances caused you to feel these things?
- What feelings did you experience?
- How did these experiences affect your work efforts? Your personal life?
- What do you imagine others saw when they interacted with you during this time?

Consider your interactions with the group.

- Do you believe that these people can be excellent?
- (If not, what are you doing trying to lead them?)

- Do you show the members of the group your belief through vulnerable moments?
- Do they know that you fight for them?
- Does expressing this belief feel uncomfortable for you?
- Does this discomfort stop you from expressing your belief?

Think about your answers to the first set of questions. Leadership is the only source of this function in the story of vision. If you have doubts as to your ability to communicate your belief, ask them if they see this aspect of your leadership.

These questions should get you an answer to the following:

- Do your employees see and understand your belief in the possibility of their excellence?

Day 6

It's time to tell a story.

Now that we have all five factors, we can get down to the details of telling the story. Today is all about examining how we can be most effective in a specific situation. Every leadership moment is situational, and the template here is designed to guide you to answers in any situation.

There are times when we talk about grand things, and there are times when we talk about small things. Vision exists in both, but in different ways.

When we talk about grand things, we explain why. We show progress towards the outcome, we connect members to the group and each other, and we point out the worth and value of the work. We motivate and inspire.

When we talk about small things, we tell what happens next. The next action, the next day, the next challenge. The steps that the group must take. And while we explain the context of these steps towards a larger outcome, our focus on the small things is to give clear direction. Expectations, activities, communication. The small things are the process of performing and combining tasks.

These two perspectives are not opposed, but they require a different focus and approach. For each of these moments, the following SEEING EXERCISE directs our attention to the relevant places. As with all doing exercises, repetition makes the thought process here become second nature.

Seeing Exercise

GRAND AND SMALL THINGS

Think about an upcoming situation where you will be in front of the group in the role of leader. Consider the following questions as you decide what you will say.

Content

- What is the story the members need to hear?
- Do the members need the emotional inspiration of a grand thing? Do they already know what to do and need inspiration to excel?
- Or do they need to concrete, deliberate planning of a small thing? Do they need clarity and direction to accomplish something new?
- Is there a specific challenge that they need to overcome? How will they know that they have achieved success in this challenge?
- What do you need to say to match the specific circumstances? What is going on that needs to be included in the members' meaning-making?
- Are there specific stories or memories that illustrate or explain the factors in this situation?
- Will you ask questions? Are there details you want the members to provide?

Timing

- Why do you need to talk about it now, or when?
- Will this occur once? What is unique and special about this moment?
- Will this occur again, and has it occurred in the past?

There is no answer to today's questions, because that answer depends on you.

Welcome to your role as storyteller.

You now have a framework to tell a story of vision. This framework is designed to focus your attention in the right places and to make sure you don't leave anything out. That is the purpose of the functional approach to leadership.

Keep refining the exercises of the last five days. These are skills that will improve your leadership, and increase the impact you have upon your organization. The same questions we asked this week will help you next week, and next year, and in ten years.

Two Weeks Later

How has it been?

Now that you've had some time to practice telling the story of vision, what are you experiencing? Have you seen a difference in the way that you communicate with your employees?

Where are your struggles?

Are you still having difficulty getting others to understand your vision? Or is your trouble with the connections between other people, and the ways that they perform the work? Or is it that you feel ineffective, like you are making mistakes or not having the impact you want?

This is what we do. We designed the functional approach to leadership to address what groups need to be successful, rather than what leaders are "should do". The result is an innovative way to understand and act in any leadership situation, and then to build those successes upon each other into a life-long, ever-improving leadership practice.

We want to hear about your experience during and after the challenge. Reach out to us at:

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Phil