

Welcome to Module 9 Lesson 2, where we will be discussing company vision.

So, think of your organization like a rowing team that the boat itself is your business and the crew members are of course the members of your team, your staff, and the seats that they're in are where your staff sits on the organizational chart.

Now, if they don't know where they're going, they don't have that vision point on the horizon where they know that's where we're all going. They're going to be rowing in different directions. They're going to be rowing at different speeds and intensities, and you're going to end up going in circles. Or you're going to end up going nowhere. Or you're going to go a completely different direction from that vision point.

So, when you identify where is the company going, it provides that **Vision**. And it provides the opportunity to develop a very clear strategy because everyone's on the same page. So, if you think of it like, let's say, you've got someone on your leadership team that's imagining that you're going to double your revenue. And then someone else is thinking, "Oh, we're happy where we are. We just need to maintain." And then you've got another person who's thinking that you're going to 10x the organization. They're going to have very different goals and different methodologies for how they do their jobs and how they direct their team.

So, once you have everyone on the same page, you have clarity of vision. You have a clear strategic plan. Everyone knows exactly how hard to be rowing. They're in unison and they're going to the same point on the horizon.

Your Path to Success

So the ultimate destination, that place on the horizon, is the **BHAG**. This is the **Big, Hairy, Audacious Goal**. This is something that feels almost ridiculous to reach but doable. You can see it and it's exciting to envision. And then you sort of reverse engineer from there. What needs to happen in the midterm in order to get to that BHAG? And then you get a little closer and ultimately you end up at the quarterly goals.



So, the plan gets more and more specific as you get closer to now so that your quarterly plan is very clear. Who is doing what, when, and why? And how are you going to track that? You're not simply naming what are the things that you're going to do this quarter, and you don't have people identifying what we call quarterly rocks, which we'll get to in a bit.

They're not things that they're going to do anyway. They're not just part of the job. These are very specific to what is going to get you to that BHAG. What is the thing that you need to do this quarter in order to meet that one-year goal? And what are the things that you need to do within the one year in order to get to the three-year goal and on until you ultimately get to the BHAG, the place on the horizon?

Stretch Goals

Your goal should be to stretch goals. As I mentioned, the Beehive should feel almost impossible and should feel less and less impossible as you get closer to now. So feel free to play with this a bit as you're going through the ignition process. Feel free to dream a little bit.

Get excited, start thinking about the impossible, start thinking that maybe the impossible, feel the impossible isn't impossible and you can actually do it.

Allow yourself that freedom. with a bit of reality mixed in if you're at 5 million today, you're probably not going to be at a hundred million a year from today. So just make sure that you're realistic, but start to think that the impossible is possible.

Best Practices for Buy-In

Sometimes, you'll find them that likely within your organization, there's going to be some doubt and there'll be maybe some lip service, assuming that the plan will go away after a period of time. First of all, don't let the plan go away. Stick with it. This is going to be exciting. And if you continue to follow your business strategy and keep your vision front of mind, you're going to see beautiful things happening.



Include your entire leadership team in your “ignition” process.

It's really important to have every department part of that process. It's important to make sure that everyone has a voice, and everyone is being heard. Because ultimately they're going to need to be the drivers of your vision. They're the people that are going to execute the strategy or drive the execution of the strategy. So it's important that they have ownership around, the ultimate vision for your company.

Once you have this ignition event, the other people in the organization are going to be curious and probably a little concerned about what decisions were made during those two days. They're going to want to know what happened, what was talked about, what's going to happen next. So, we highly recommend that you plan to have an all-hands meeting shortly after your ignition event- where you provide as much transparency as possible to the rest of your team. It's important that the **message is heard throughout the entire organization**.

Here's the message all at once. And it's important that the message is coming from the top. Have your CEO or your founder share that message with the entire organization during an all-hands meeting and be as transparent as possible. There are some organizations that don't want to share all the financial metrics, that's entirely up to you. But as much as you're comfortable with sharing, your people will appreciate having the insight.

Stay flexible with staffing

Throughout this process, you're going to find that there are probably one or two members of your leadership team who are not in the right role. There's a saying that the people who got you here aren't necessarily the people to get you there, and that is very much the case when developing your vision and your business strategy.

So the folks that go through this ignition process with you will probably not be the exact same team meeting with you at your next annual planning session. There will be individuals who realize that the vision that you have is not for them.

And it's important to just let them go. Honestly, it makes it a lot easier for you when people self-select.



As a CAIO, you're a part of the leadership team, and the leadership team, it's very important that everyone is on the same page. Now you might find that there are people who really are right for the organization, they're just not right for that particular seat that they're in. And maybe there's a lateral move for them to make, or maybe they actually find that they were happier in a role that's not part of the leadership team.

So, just be open to the possibility and be open to the suggestions that might come from your team members. Listen for those hints that maybe there's a better place for them. And just know that that's perfectly fine. Usually what happens after somebody either leaves an organization or moves to a different role, is that the leadership team becomes much more cohesive and there's sort of, a fuel that happens amongst the team where all of a sudden you see so much more come to life. And there's just more of a sort of cohesive feeling. It feels more like a team.

Vary your measurables

People often want to really just look at financial metrics when they're talking about goals. I really encourage you to think about other metrics to look at. Certainly, you need to be looking at your revenue and your profit goals.

But, what else will engage your team? You're the people who are the boots on the ground and probably aren't going to be very excited at the idea of doubling your revenue. That's not going to be very meaningful to them unless they possibly have a bonus or something that's tied to it.

Likewise, your team, the leadership team, and you as CAIO will probably get more excitement if there are other impacts that you're having besides financial that you can strive for and that you can see and be excited about. So this might be, something around your organization. What are ways that you can impact your staff?

You might look at things like turnover, for example, showing that the people who work there for your company are happy there and that they want to be there. You could also look at how you're impacting your community. How are you impacting your clients and your customers? Just think about other things that you can be looking at besides the financial metrics.



Clear and memorable concepts

This is basically the idea that we're not going to have a complicated mission statement. We're going to have a very clear BHAG that everybody knows. You should be able to be walking out down the hall at your organization and stop anyone in the hall and say, "What's our BHAG? Who's our ideal customer avatar? What are our core values? "

These should be key phrases that are said often throughout the organization and everyone should be able to recall them easily. So they need to be clear and memorable so that they can identify with them. Likewise, visuals will do the same thing.

I'll have an interview with Will Scott later in this module where we will talk about the visuals that he creates around company culture. That might help get the juices flowing for other ideas, but just be thinking about signs that you might put on the wall posting your vision summary where everyone can see it, or having your core values above the door.

Having a poster with imagery or even just verbal imagery like the idea of the rowing team. Think of what's a good metaphor for your team that really exemplifies the vision and inspires people to want to reach that destination. So next we'll be talking about core values and I will see you there.

Thank you.