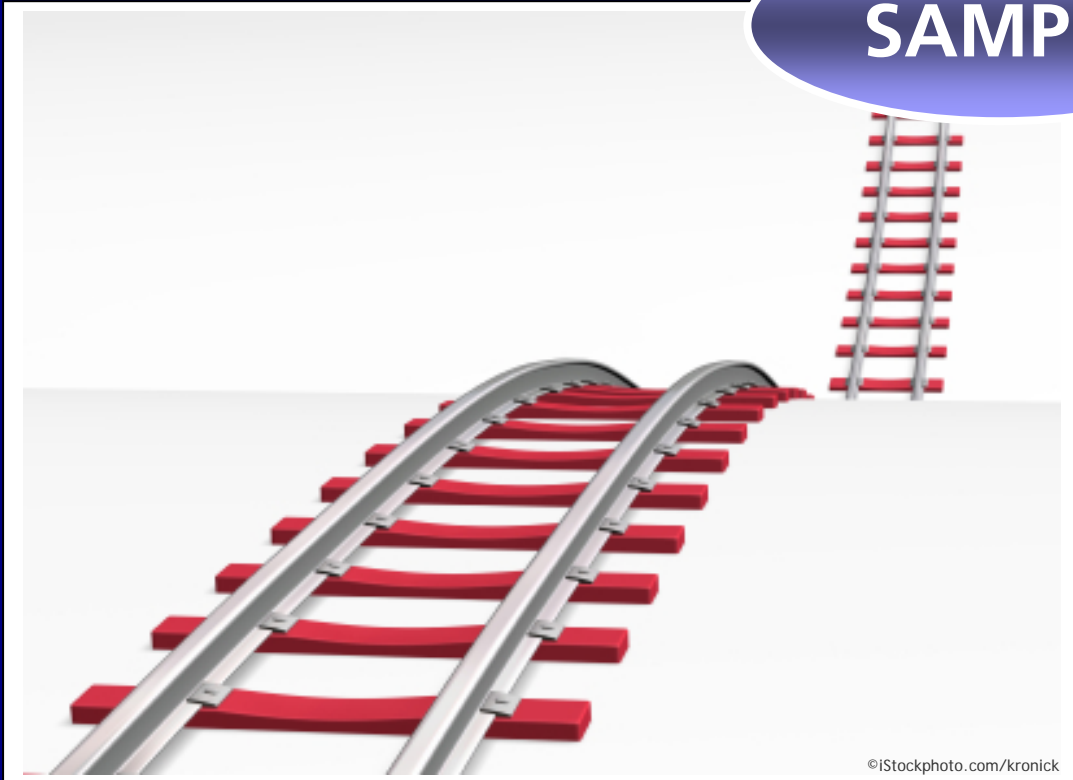


Six Keys to Effective Leadership

Vision

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Vision training and learning resources included in this E-book:

- ➔ *Vision and leadership* – a 6-page synthesis exploring the what, why and how of vision as an essential and inspiring quality in managers and leaders today.
- ➔ 4 self-assessments enabling you or your learners to pinpoint levels of vision and areas in which to focus on.
- ➔ 4 games and teasers making learning both challenging and fun.
- ➔ 5 hands-on vision activities for the individual and team
- ➔ A vision role play to put practice into learning
- ➔ 25 high-impact coaching and self-coaching tools
- ➔ An interactive vision case study including options, self-study questions, discussion topics, additional approaches and answers.
- ➔ Quotes, tips, suggestions and video links



Six Keys to Effective Leadership

VISION

Tom Gamble



The Management Learning Box

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The publisher

The vision of The Management Learning Box is to provide a quality, time-saving and flexible source of raw learning content for all those connected to the management and leadership training fields. Centred around a series of qualities featuring in many corporate leadership frameworks, The Management Learning Box learning content can be copied, adapted, immediately deployed in the training room or integrated into any final training format including coaching sessions, e-learning modules, videocast add ons, e-books, books, training manuals, self-coaching media or training programmes. The Management Learning Box also provides bespoke learning content development services and has provided many leading companies and organisations with e-learning and film scripts, book content, training programmes and case studies. A second major aim is to act as a platform for training professionals and academics to market and sell their learning content on The Management Learning Box website. Part of Management Learning Box yearly profits are donated to learning projects throughout the world, specifically aimed at improving the knowledge of young people in developing countries.

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If you want to build a ship, don't drum up the men to gather wood, divide the work, and give orders. Instead, teach them to yearn for the vast and endless immensity of the sea.

Antoine de Saint Exupéry

Introduction and acknowledgements

The topic

Vision and envisioning are what set leaders apart from mere managers or supervisors. It is not so much getting things done through others as getting others to *want* to do things by providing them with an inspiring, challenging and empowering vision of a new world they will help build. This is crucial in any change scenario – a constant feature of today's organisations and teams. By taking objectives and strategies that are relayed down from a higher or corporate vision and effectively transforming them into a powerful vision at lower levels, manager-leaders are able to create the necessary motivation, drive and energy to spark off great achievement and transformation. But the journey is not an easy one. With any move towards a "new world" there are risks involved as people push back the limits into unknown territory. Central to vision is belief and motivation and the impact of inspiration and the rewards that not only the team, but the wider perspective too, will gain. This essential book for the manager-leader provides key tools, exercises, examples and practice to enable inspirational change to take place.

How to use this book

The *Six Keys* series of downloadable books in PDF and Word formats contain a condensed essential best of the four hundred or more available learning formats featured on The Management Learning Box website.

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Thanks to Robert Dilts, leading coach, consultant and author in leadership, vision and change management, who provided the motivation and inspiration for much of the learning content featured in the *Six Keys* series. Thanks, too, to Rahul Patel and his team who from the outset have provided the backstage technical work involved in the website, e-books and learning platforms. Steve Flinders, managing associate, author and consultant at York Associates, UK, contributed enthusiasm, interest and encouragement and Daphne Chisholm-Elie of BCLS sparked off the original idea. Learning sources such as TED, Wikipedia and others must also be thanked. And finally, Ashoka, the cat, who provided much companionship and a listening ear during the many hours (and many of them early!), that went into developing the *Six Keys to Effective Leadership* series.



1 A summary of **vision**

Training uses: Analysis, Discussion trigger, Example, Introduction to topic/theme, Marketing document, Stand-alone exercise, Summary/synthesis

Associated words: Leadership, way, path, desired future, dream, image, long-term, challenge, change, stretch, purpose, wider perspective, shared benefit, motivation, inspiration, creativity, innovation, imagination, empowering, shaping, journey, voyage, adventure, sustained effort, courage, common bond, destiny, meaning, alignment.

Recommended public: Project managers, Managers, Directors, Leaders, Entrepreneurs, Masters+ students

Vision and leadership



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Vision is one of those moments in which leadership really has a chance to shine. Faced with survival, setback, hardship, trial, challenge or change so common to today's business environments, teams and organisations need the inspiration and belief to lift them up from the ground and set them towards a future to which they want to belong. Vision is all about hope and the effort required to reach a new world. It is about providing a picture of where the leader wants to take his people, the purpose of that journey, the strategies and objectives along the way and the concrete benefits and gains when that vision is reached. It empowers individuals, binds teams in common belief and effort and leads organisations to new markets, new strengths, self-esteem and recognition. Vision inspires people. And when people are inspired, and when they believe, then they will strive for great achievement regardless of the fears, risks or dangers they may be confronted with.

8 Six Keys to Effective Leadership – Vision

Focusing on what vision is all about

Vision is a word that is used confusingly. How often have you heard people say “we have to gain vision on the market” or “our vision is to become the first in our field” or “my vision of the problem is XYZ”? Moreover, *vision* is often mistaken for goals, strategies, objectives and ambitions. Indeed, vision in a leadership context is not about personal, inwards looking strategies, goals and objectives. Vision is all about setting a long-term hope or destination - which may be rather nebulous in itself (indeed it has to be in order to strike people’s imaginations) – that nevertheless moves people in a direction within a set of guidelines. These guidelines may contain specific rules and objectives, strategies on how to reach the objectives that lead to the vision, milestones, beliefs, skills requirements, behaviours and overriding purpose. A vision has to be approximate enough to fire people’s minds and inspire them, but also plausible enough to resist ridicule, disbelief, rejection or failure. Finally, a leader’s vision is perennial. It outlasts the leader when he/she has gone from the picture.

Vision and purpose

Above all, and perhaps the driving motivation affecting everything else a vision hopes to achieve, a vision needs wider purpose. In climbing the mountain and discovering the new world in the valleys beyond, people and organisations are not just doing it for themselves. They are making that extraordinary effort for the benefit of others too. This wider purpose could be the team itself, the organisation, the team’s customers, its suppliers, partners, stakeholders or shareholders. In many cases, a

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Video:

[Chris Anderson shares his vision for TED](#)

(Visit TED at www.ted.com)

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Video:

Chris Anderson shares his vision for TED

(Visit TED at www.ted.com)

References and further resources

- Robert Dilts, *Visionary Leadership, Alpha Leadership*.
- The word *leader* finds its root in the old English/Germanic *leadan* or *lithan*, meaning *to go/to cause to go with/to journey*.
- See Robert Dilts/Gregory Bateson, the *Logical levels pyramid*.



2 Vision assessments and self-assessments

Training uses: Activity, Analysis, Exercise, Profiler, Self-awareness exercise

Associated words: Leadership, way, path, desired future, dream, image, long-term, challenge, change, stretch, purpose, wider perspective, shared benefit, motivation, inspiration, creativity, innovation, imagination, empowering, shaping, journey, voyage, adventure, sustained effort, courage, common bond, destiny, meaning, alignment.

Recommended public: Project managers, Managers, Directors, Leaders

1 A vision quality analysis And assessment



Vision involves a combination of a number of qualities. Give yourself a score for each of the following from 1 – 5 (5 being highest). All statements are positive-oriented. A low score would indicate improvement to be made in a given area.

1. **Foresight:** I am able to look ahead and identify events and changes that will have an impact on my team, organisation and society at large. [1] [2] [3] [4] [5]
2. **Creativity:** I am able to pick up on an issue and use my creativity to generate new ideas, systems, processes and methods to trigger positive change. [1] [2] [3] [4] [5]
3. **Insight:** I have the ability to analyse these creative ideas and transform them into concrete and plausible goals that will achieve practical, added-value results for my team and organisation. [1] [2] [3] [4] [5]
4. **Wider purpose:** I look beyond ambition and personal gain to include my team, organisation, customers, stakeholders and society as potential benefactors of my actions. [1] [2] [3] [4] [5]

3 Does your leadership show vision?

Read the questions and assess yourself by giving a score from 1 – 5 (1 is lowest, 5 highest). All statements are positive-oriented. A low score would indicate improvement to be made in a given area.

1. When implementing change within your team/organisation, to what extent do you give your people an inspiring picture of where that change will take them and what that change will look like? [1] [2] [3] [4] [5]
2. When aiming for change, to what extent do you share your ideas with your team(s) and encourage them to contribute ideas and effort to build it? [1] [2] [3] [4] [5]
3. When implementing change, to what degree do you tie in to your change/vision the wider purpose of things and the benefit in it for others (team, organisation, clients, partners, society, world)? [1] [2] [3] [4] [5]
4. To what degree are you capable of “walking the talk” and actually incarnating the change you wish to see? [1] [2] [3] [4] [5]
5. When developing your plan for improvement and change, to what extent do you analyse the probable impact of it on your team/organisation’s role and identity, values, skills, behaviours and environment? [1] [2] [3] [4] [5]
6. When planning your change, to what degree do you provide challenging and motivating goals and objectives that

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3 Vision games and teasers

Training uses: Activity, Analysis, Discussion trigger, Exercise, Introduction to topic/theme, Personal profiler data sheet, Profiler, Self-awareness exercise, Team-building activity

Associated words: Leadership, way, path, desired future, dream, image, long-term, challenge, change, stretch, purpose, wider perspective, shared benefit, motivation, inspiration, creativity, innovation, imagination, empowering, shaping, journey, voyage, adventure, sustained effort, courage, common bond, destiny, meaning, alignment.

Recommended public: Project managers, Managers, Directors, Entrepreneurs, Leaders

3 Visionary leaders



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- On a flipchart/screen write "Visionary leaders".
- Distribute sheets of paper to the individual/pairs/group and ask learners to web search and write/write a short paragraph on an example of how a leader showed vision.
- Post the stories up on the flipchart or walls as reference material/identifiers for the audience.
- (Alternatively), have people read out and explain in greater detail their choice of visionary leader.
- (Alternatively), have the audience ask questions to elicit the leader and his/her vision in question.
- What common qualities have the examples highlighted in relation to vision?
- What conclusions can we draw from these examples?



Notes/Action:



4 Vision activities

Training uses: Activity, Analysis, Assessment/self-assessment, Discussion trigger, Exercise, Introduction to topic, Personal profiler data sheet, Self-awareness exercise, Team-building activity, Warm-up exercise

Associated words: Leadership, way, path, desired future, dream, image, long-term, challenge, change, stretch, purpose, wider perspective, shared benefit, motivation, inspiration, creativity, innovation, imagination, empowering, shaping, journey, voyage, adventure, sustained effort, courage, common bond, destiny, meaning, alignment.

Recommended public: Project managers, Managers, Directors, Entrepreneurs, Leaders

1 Clearing the fog from vision



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Instructions

Introduce the activity by stating that one of the basic problems in creating a vision is the misuse and misunderstanding of the word (ex: we often hear things like “we must have clearer vision on this” or “our vision of the market is hazy”).

Inform your trainee/coachee/team that there is also often great confusion between the following words: vision, goals, objectives and strategy.

The purpose of the following activity is to clear away the fog and provide a clear idea of what vision actually is before getting down to creating it.

Vision versus goals and objectives, strategy

- (Individually or in sub-groups). Hand out the following definitions noted on separate strips of paper:

1. Something very specific and aimed at, a destination usually containing steps, stages and definite time frames.
 2. Something that appeals to the wider perspective or system, both inspirational and motivating, that deals with the very long term and that is perennial in nature.
 3. Something used as a means for achieving a result, a plan usually involving a combination of resources and methods.
- Now match these definitions to the following:
 - **Vision:**
 - **Strategy:**
 - **Goals and objectives:**
 - Now hand out the following examples noted on separate strips of paper:
 - A) We'll use our marketing department to develop a campaign to raise awareness among our company delivery drivers.

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6 Vision coaching and self-coaching exercises

Training uses: Flashcard, flowchart, checklist, action card, tip, self-awareness exercise

Associated factors: Leadership, way, path, desired future, dream, image, long-term, challenge, change, stretch, purpose, wider perspective, shared benefit, motivation, inspiration, creativity, innovation, imagination, empowering, shaping, journey, voyage, adventure, sustained effort, courage, common bond, destiny, meaning, alignment.

Recommended public: See individual coaching exercises

1 Getting from management to leadership to vision



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Recommended public: Managers, directors, entrepreneurs, leaders

Management

- How would you sum up your management responsibilities?

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- In what way do you get things done through others? What tasks do you give your people to perform?

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- What objectives have you set your team members/people?

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- What processes or systems are in place to help reach these objectives?
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.....
- What do you spend most of your time doing with respect to your team?
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.....
.....
- What rewards, recognition or sanctions can you use to reach team objectives?
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Leadership

- In what way can you share opinion and come to common and shared objectives with your team members?
.....
.....
.....
- How can you empower your team to reach their objectives (initiative, flexible working hours, creativity, new ideas, accepting a degree of failure and learning from mistakes, etc.)?
.....
.....
.....
- What systems, processes, methods, behaviours and results would you like to change?
.....
.....
.....
- In what way can you get others to *want* to make these changes?
.....
.....

Vision

- To what higher purpose do the team’s objectives serve?

.....
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.....

- To what wider purpose will the changes.....



Notes/Action:

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2 Putting vision into your leadership

Recommended public: Project managers, managers, directors, entrepreneurs, leaders

- What is your role?

- What are your responsibilities linked to that role?

.....
.....

- What are your current actions/what are you currently doing in that role?

.....
.....

- Who are you responsible for?

.....
.....

- What are their skills?

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.....
- What are your team's current actions/what are they currently doing?
.....
.....
.....
- Where are you currently taking your people?
.....
.....
- Where would *you* like to go (goals, dreams, new projects/products/systems, changes, challenges, etc)?
.....
.....
.....
- Where would *your people* like to go (goals, dreams, new projects/products/systems, changes, challenges, etc)?
.....
.....
.....

12 Plotting your vision

Recommended public: Project managers, Managers, Directors, Leaders

Wider purpose

- In what way does what you want to achieve appeal to the wider perspective of things? Who or what else will it benefit? What larger system is it concerned with?
.....
.....
.....

20 Six Keys to Effective Leadership – Vision

- In what way is it long-term? How will it go on, even without you?
.....
.....
.....
- In what way will it bring something to your customers, suppliers, partners, stakeholders?
.....
.....
.....

Strategies

- What will you use to achieve what you want to do?
.....
.....
.....
- How do you intend to achieve what you want to do and with what combination of resources and methods?
.....
.....
.....

Goals and objectives

- What, specifically are you aiming at in the long term?
.....

20 Building commitment through a shared vision

Recommended public: Project managers, Managers, Directors, Leaders

Imposing your vision will result in resistance, rejection and/or compliance rather than commitment to ensure the success of your vision. It is therefore essential to build a shared vision.

- Organise a team meeting.
- Where is the team currently at in their projects, objectives, methods, approaches, wants and needs?

Full Vision coaching and self-coaching exercises and tools are included in

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7 Vision case study

Training uses: Analysis, Discussion trigger, Example, Exercise, Introduction to topic/theme, Script, Team-building activity, Test

Associated factors: Leadership, way, path, desired future, dream, image, long-term, challenge, change, stretch, purpose, wider perspective, shared benefit, motivation, inspiration, creativity, innovation, imagination, empowering, shaping, journey, voyage, adventure, sustained effort, courage, common bond, destiny, meaning, alignment.

Recommended public: Project managers, Managers, Directors, Entrepreneurs, Leaders, Masters+ students

1 A struggle for vision



Part 1

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It was an important day for Jen Pertuis. Several weeks before, she had met with her organisation's new owners and now she was to announce several changes in her team's way of doing things that she knew would improve performance and results.

She'd been at InfoCreate IT for three years now and from her beginnings as a software engineer had worked for the burgeoning Info Panels product range department and was today heading its team of developers, engineers and sales reps. The department had been one of the main attractions for its recent buyers, a large international electronics company. They had seen the immediate potential of providing customers with screens and hardware through which to broadcast their practical information on the traffic, weather, maps and travel risks for visitors and employees. The message from the new owners had been straight to the point: improve processes and performance to increase results. They wanted the department to be 35% up on sales by the end of the year.

Jen had spent a lot of time over the past weeks analysing her team's methods and processes. She believed she had found several key factors which required change. And in changing them, she was pretty sure she would reach the challenging objectives she had been set.

By ten o'clock all the team was present: five developers, eight engineer-project managers, three installation and after-sales engineers and three technical sales reps. Switching on the projector, she started by welcoming them and then moved on to the key message.

"As you know from the mail I sent you prior to the meeting, we've been given a tough challenge to take up – namely boost development and sales by 35% for the end of the year. Needless to say that I want to reach this. And as you know me pretty well by now, you know that I'll do it. So, all that remains now is for me to show you *how* we're going to do it."

Over the next twenty minutes, Jen went through her presentation, explaining the changes to be made. Firstly, change the development process by taking out excess and time-consuming steps. Secondly, separate with the old way of working within skills silos in the department. Four new teams were to be made up, each one composed of all the various existing skills and resources. They would be project dedicated, working towards production targets. Thirdly, team performances were to be displayed on a large board at the entrance to the department's open space premises and updated daily. Inter-team meetings would be chaired by Jen where feedback and advice would be given to re-track performance. Fourthly, Jen had hired a quality and methods manager, Toby Sword, to guarantee that the team would optimise the new processes in place. He was to arrive the following week and work closely with Jen with supervising and re-orienting. Lastly, an outsourcing network was to be set up to cope with the increased workload. This would mean that the department teams would have to contact, meet, select, train and manage them, if necessary remotely. Each team was to be quality and quantity driven, and would be responsible for final validation with Jen and Toby Sword before on site delivery to the client.

Nearing the end of her presentation, Jen stepped back from the projector and looked at her team. She had one last and important point to tell them. Given

the tough objectives, it was plain that the team would be asked to commit more time and effort to reaching them. Things would be harder than before, but necessary if she was to deliver the department results on target and on time. The changes she wanted, notably in processes and team mix, would help streamline things and assist them. But in the end run, it was only by facing the reality of things and committing that extra effort that the changes could succeed. She expected it of them and was sure they would give this commitment.

“Any questions?” she finally asked, smiling. There was moment’s hesitation and then one of her engineers raised a hand. “Yes, Tony.”

“Are there any guidelines or milestones in this change you want to make us go through?”

“Yes. I haven’t fully mapped out the objectives as yet, but that’s because I’m waiting for Toby Sword to join us. The essential message behind what I’ve presented is that the changes will take place and the quicker the better. By the way,” added Jen, lowering her voice, “you said *the changes I wanted you to make*. We have to make these changes. Don’t you think they’re necessary, Tony?”

Tony shrugged his shoulders and nodded. “Yes,” he said. “I see that some things have to change. But maybe we.....”

Questions to part 1

- In what ways do the changes Jen wishes to make communicate themselves as constraints rather than motivating goals?

.....
.....
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.....

- In what ways does Jen’s language and actions give the message that the changes are a reflection of personal ambition?

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- Several typical reactions to change occur within the team. Identify them and add any others you can think of or have experienced.

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- Look at the following options Jen is faced with and select the ones you believe she should undertake:
 1. Reflect on how the new objectives will benefit her, her team, the company, its clients and end users?
 2. Let her team determine the necessary changes to make in order to make them take ownership of the objectives.
 3. Assess her team’s role, identity and skills and analyse the impact of the changes she wants to make.
 4. Talk to her team members and try to identify their fears and motivations with regard to the possible changes
 5. Identify any team members who will resist her plans and transfer them to other departments

Full Vision case study included in

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