

# The What of Change

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## Writing a vision statement for change is hard work, but creating a motivating vision is much more difficult. It is tough work.

Most experts advocate creating a vision as a necessary step in any change initiative. But managers have a tough time following this advice. Change vision statements are often too long, too confusing or too generic to motivate action in the direction of the change. It's tough to condense the vision into a couple of sentences or paragraphs that sing, but it is worthwhile to try. For example, Google's pithy vision statement has long provided a guiding star for employees to follow: "To make the world's information universally accessible and useful." Contrast it with the following vision statement from an actual Fortune 500 firm that shall remain nameless: "Our vision is to maximize shareholder value by enhancing financial performance and providing long-term profitable growth."<sup>1</sup> Very few employees are going to spring out of bed each morning full of enthusiasm to "maximize shareholder value."

A clear vision is important for change leaders to think through because it forces you to identify exactly what you are aiming for instead of some vague, fuzzy or rosy picture of the future. It is important for your employees, too. During times of change, they want leaders who have a clear vision and communicate a clear message. As John Kotter famously said: "Without a vision, change can dissolve into a list of confusing, incompatible, time-consuming projects that either go in the wrong direction or nowhere at all."<sup>2</sup>

So I hope we can agree that a vision is important. Now let's observe a vision in action and follow Cirque du Soleil through its growth into a large, successful, international arts organization.

## Introductory Case Study: Reinventing an Industry Through Vision<sup>3</sup>

As Guy Laliberté sat on a sunny beach in Hawaii in 1984, the vision of a new kind of circus came to him. Did it appear entirely whole to him that day or did it take more time before he saw it clearly and completely? Perhaps that does not matter. What does matter is that Laliberté's vision evolved into a harmonious melding of art, financial success and social responsibility. In this perfect circus, beauty would reign, but artists would not need to starve to produce great art. Furthermore, there would be no artistic angst about profits because part of those profits would be used to help the underprivileged. And underlying everything would be a reinvention of the circus without the tacky animal acts and sideshows—an artistic vision of a circus that married dazzling athletic performance with theatre and music to create an experience for all the senses and the emotions. No wonder so many ran away to join this circus.

The new circus got its start later that year when Laliberté and Daniel Gauthier, a twenty-four-year-old youth hostel manager with business savvy who would be Laliberté's partner for the next seventeen years, talked the Quebec government into giving them over \$1 million for a show to celebrate the 450th anniversary of the discovery of Canada by Jacques Cartier. Back in 1984, there was no such thing as a corporate vision, but Laliberté and his passionate group of performers had a clear idea of the future they wanted to create. "Cirque du Soleil was born of the wild aspirations of a handful of individuals hungry for light, freedom, and the gifts of the imagination."<sup>4</sup>

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<sup>1</sup> Kasowski, B., & Fillion, L. J. (2010, April). A study of the 2005 fortune 500 vision statements. HEC Montreal working paper, 2010-04.

<sup>2</sup> Kotter, J. (1996). *Leading change*. Boston, MA: Harvard Business School Press.

<sup>3</sup> I am grateful to Kirsteen MacLeod, who helped conduct interviews within the company and who contributed a great deal to the writing of this case study.

<sup>4</sup> Babinski, T. (2004). *Cirque du Soleil: 20 years under the sun*. New York, NY: Harry N. Abrams.

Their confidence in the Cirque vision sustained the young troupe through early struggles for survival. In 1987, in a make-or-break gamble, Laliberté and Gauthier took their show *We Reinvent the Circus* to the Los Angeles Arts Festival. They knew if it flopped, there would be no money to bring the cast and equipment home to Canada. In a bold move, they bet everything on one opening night: in exchange for top billing and promotion, they agreed to do the show for a percentage of ticket sales. Only when the first performance was followed by a long, enthusiastic ovation did they know that their decision to perform without a safety net had paid off. Later that year, Cirque became a private company, and by the end of 1988 it was well into the black, touring and selling out shows in the U.S.

The long-standing mission statement of Cirque du Soleil contains its bedrock values to this day. It reads:

Cirque du Soleil is an international organization founded in Quebec and dedicated to the creation, production and performance of artistic works, whose mission is to invoke the imagination, provoke the senses and evoke the emotions of people around the world.<sup>5</sup>

Cirque's mission informs the vision in that the company must continually find new ways to "invoke the imagination, provoke the senses and evoke the emotions" of its audience. To accomplish this, its creative team, performers, designers and crew invent awe-inspiring experiences for audiences by mixing circus, theatre, dazzling acrobatics and live original music into something that unmistakably says, "Cirque." The artistic vision at Cirque has often been expressed in the goal of "contaminating the world with beauty."<sup>6</sup>

Talented artists and their dazzling shows are the basis of Cirque's magic, but shrewd business decisions are another element of the vision. This business vision is all about taking risks and artistic control. During the 1990s, Cirque made a breathtaking transformation into a successful global brand that redefined its industry. Throughout this time, the company remained "dedicated to the creation, production and performance of artistic works," but success also brought further challenges and temptations to dilute the vision. Would Cirque let go of its artistic control in order to grow and prosper? Not according to Marc Gagnon, senior vice president of corporate services: "One value that is totally non-negotiable is to uphold the integrity of our creative process. That is why it takes years and years to create partnerships—with Disney, for example, which is used to taking the lead, and also with Fuji in Japan and MGM."<sup>7</sup>

Cirque's refusal to make creative compromises is well illustrated in its drawn-out deal making with The Walt Disney Company. "I was obsessed with Cirque du Soleil, obsessed to get it as part of the Disney entertainment complex," said Michael Eisner, Disney's former CEO.<sup>8</sup> Yet it was ten years before his desire was even partially satisfied. Disney tried to convince Cirque to be acquired, but only when artistic control was ceded to the circus did the partnership become possible, and outright acquisition was never considered.

In the 1990s, as Cirque shifted from survival mode and its resources and influence grew, it expanded activities related to building a better world. Its goal states: "Cirque du Soleil strives to position itself in the community as a responsible proponent of change."<sup>9</sup> Many companies espouse similar goals, but Cirque du Soleil's vision of being a responsible proponent of social responsibility is truly exceptional.

At the heart of this vision is a group that holds a special place in its heart: youth at risk, and in particular, street kids. In 1993, Cirque formed a partnership with Jeunesse du Monde to create Cirque du Monde. This

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<sup>5</sup> Cirque du Soleil Mission, Goal and Values. (n.d.). Retrieved July 6, 2015, from: <https://www.cirquedusoleil.com/en/about/global-citizenship/introduction/mission.aspx>

<sup>6</sup> Ibid.

<sup>7</sup> M. Gagnon, from interview 2005.

<sup>8</sup> Tessier, E. (2003). *Run before you fly: a portrait of cirque du soleil*. Montreal, QC: Creations Meandres Inc.

<sup>9</sup> Cirque du Soleil Mission, Goal and Values. (n.d.). Retrieved July 6, 2015, from: <https://www.cirquedusoleil.com/en/about/global-citizenship/introduction/mission.aspx>

intervention program holds circus workshops for marginalized youth around the world, giving them a way to forge new ties with society and build self-esteem. It is carried out with community-based partners in thirty-four communities on five continents around the world. “Cirque sees this global issue in the light of its own beginnings as a group of street performers and wants to help promote the great potential of young people.”<sup>10</sup> Cirque’s founders’ dreams came true in part because there were older people who believed in them, regardless of their age, image or status as street performers. Cirque’s VP of Public, Social and Cultural Affairs Gaétan Morency explained: “Arts, business and social responsibility: an important balance but fragile; there’s a tension among the three. Cirque is a balancing act.”<sup>11</sup>

What is the secret of Cirque’s astonishing success? Ask its employees, and they won’t talk about strategy or point to a strong management structure. Rather, they will tell you that it’s the power of Guy Laliberté’s vision that has always held the company together. Even amid radical change, Cirque’s vision has kept artistic, business and social objectives aligned, and the organization in balance. Human Resources Director Richard Imbeau put it succinctly: “Guy is the ‘soleil’ in Cirque du Soleil. Without him, you’d have a circus but not the same light.”<sup>12</sup> So Cirque spends a lot of energy keeping Laliberté’s vision alive—a big challenge in a company with over five thousand employees spread out around the world,<sup>13</sup> half of whom who have been with the company less than three years.

## Vision, Mission and All That Jazz

It is important to clarify what I mean by vision, mission and values because various experts use these terms differently and/or interchangeably. Collins and Porras presented one of the clearest, most cogent frameworks for understanding vision in their book, *Built to Last*.<sup>14</sup> Their research determined that long-lasting organizations pay attention to vision, which they define as “core ideology”; in other words, their core purpose and values. But they also pay attention to the envisioned future, which they define as “BHAGs” (big, hairy, audacious goals), which are ten- to thirty-year stretch targets, as well as a vivid description of what the organization will look like when the BHAG has been achieved.

### Core Ideology: Core Purpose and Core Values

The core ideology of an organization is composed of its core values and core purpose, which many call the “core mission” (from here on I will combine these terms to avoid confusion). The core purpose/mission of an organization should last at least one hundred years and really be its reason for existence. For example, Ben & Jerry’s Ice Cream states its core purpose/mission as follows:

To make, distribute and sell the finest quality all natural ice cream and euphoric concoctions with a continued commitment to incorporating wholesome, natural ingredients and promoting business practices that respect the earth and the environment.<sup>15</sup>

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<sup>10</sup> Spotlight. (2004). Prepared by the planning and internal communications department of cirque du soleil, 33.

<sup>11</sup> G. Morency, from interview, 2005.

<sup>12</sup> R. Imbeau, from interview, 2005.

<sup>13</sup> Cirque du Soleil Sustainable Development. (n.d.). Retrieved July 6, 2015, from <https://www.cirquedusoleil.com/en/about/global-citizenship/sustainable-development/workplace.aspx>

<sup>14</sup> Collins, J., & Porras, J. (2002). *Built to last: Successful habits of visionary companies*. New York, NY: Harper Business.

<sup>15</sup> Farfan, B. (n.d.). Company mission statements - Complete list of world’s largest retail missions: Ben & Jerry’s mission statement - product, social, economic missions for change. Retrieved July 6, 2015, from: <http://retailindustry.about.com/od/retailbestpractices/ig/Company-Mission-Statements/Ben-and-Jerry-s-Ice-Cream-Mission-Statement.htm>

Typically, the organization's core purpose/mission does not change unless the organization goes through a radical upheaval. But it inspires change because the organization must adapt to a constantly changing external environment. For example, the core purpose/mission of the 3M Company has not changed; it remains: "To solve unsolved problems innovatively."<sup>16</sup> But the product line has changed greatly over time as the company has continued to solve new problems presented by the marketplace. And the short purpose/mission statement of Walmart has remained "To give ordinary folks the chance to buy the same things as rich people,"<sup>17</sup> although the merchandise it sells has evolved with changing customer tastes.

In companies that are successful over the long term, Collins and Porras found that the core ideology is also supported by a set of core values. Core values are guiding principles that have intrinsic value and importance to those inside the organization. Companies that last tend to only have between three and five core values because too many tend to confuse rather than illuminate, and only a few are necessary to describe how the organization carries out its purpose/mission.

### **Envisioned Future: Vivid Description and BHAGs**

Now let's turn to the future. In their research, Collins and Porras found that long-lasting companies adapted constantly by creating new visions in line with the requirements of the external environment—without changing the core ideology. They state:

Once you are clear about the core ideology, you should feel free to change absolutely anything that is not part of it. From then on, whenever someone says something should not change because "it's part of our culture" or "we've always done it that way" or any such excuse, mention this simple rule: If it's not core, it's up for change.<sup>18</sup>

The envisioned future serves as the glue that holds the organization together during change. It motivates people to buy into the change direction, especially if the end destination is attractive to them.

When thinking about the envisioned future, Collins and Porras recommend that organizational leaders set a BHAG or several of them. A BHAG is a bold stretch goal that is used as a powerful way to stimulate progress. Many vision statements do little to spur change forward because they do not contain the powerful mechanism of a BHAG.<sup>19</sup>

A true BHAG:

- acts as a unifying and focused point of effort
- has a clear finish line so that the organization knows when it has been achieved
- is tangible, energizing, highly focused
- takes little or no explanation—people get it!<sup>20</sup>

For example, the vision of the Susan G. Komen organization is to create "a world without breast cancer."<sup>21</sup> In very few words, this powerful vision statement exhibits all of the above characteristics. If you are embarking on a change journey, you may as well have stretch goals because little goals are not worth committing your organization's time and resources to create.

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<sup>16</sup> Mission Statement. (n.d.). Retrieved July 6, 2015 from: <http://www.businessplans.org/mission.html>

<sup>17</sup> Ibid.

<sup>18</sup> Collins, J., & Porras, J. (1996, September/October). Building your company's vision. *Harvard Business Review*, 73.

<sup>19</sup> Ibid.

<sup>20</sup> Ibid.

<sup>21</sup> Susan G. Komen National History. (n.d.). Retrieved July 6, 2015, from: <http://komennorthwestnc.org/about-us/history/>

## Vivid Description

A vivid description of the envisioned future is a vibrant, engaging and specific description of what you will achieve with the end goal or BHAG. If it is tangible in the minds of your organization's members, it creates alignment and understanding between them and helps build support for the change. As Collins and Porras wrote, "Think of it as translating the vision from words into pictures, of creating an image that people can carry around in their heads. It is a question of painting a picture with your words."<sup>22</sup>

For example, Henry Ford brought to life the goal of democratizing the automobile with this vivid description:

I will build a motor car for the great multitude . . . It will be so low in price that no man making a good salary will be unable to own one—and enjoy with his family the blessing of hours of pleasure in God's great open space . . . everyone will have one. The horse will have disappeared from our highways, the automobile will be taken for granted . . . and we will give a large number of men employment at good wages.<sup>23</sup>

The power of Henry Ford's vision was such that all he imagined came true.

### *Example of the Interplay Between Core Purpose/Mission and Envisioned Future<sup>i</sup>*

Although the short mission statement of The Walt Disney Company is "to make people happy,"<sup>ii</sup> there is a longer, more elaborate version:

[To be] one of the world's leading producers and providers of entertainment and information. Using our portfolio of brands to differentiate our content, services and consumer products, we seek to develop the most creative, innovative and profitable entertainment experiences and related products in the world.<sup>iii</sup>

The company started with the birth of Mickey Mouse and his first cartoon *Steamboat Willie*, but it would have evolved very differently if Walt Disney had thought of his mission in terms of just making cartoons.

In the 1930s, The Walt Disney Company fulfilled its mission statement, becoming "one of the world's leading producers and providers of entertainment," and continued its mission to develop the "most creative, innovative and profitable entertainment experiences." But the vision had changed to take advantage of new technologies when it introduced feature-length animated films, such as in 1937, when *Snow White and the Seven Dwarfs* premiered in colour.

In the 1940s, the mission still had not changed and the company continued to be "creative and innovative" and a "leading producer of entertainment." For example, it released one of its highly-regarded classics, *Fantasia*, and formed the Walt Disney Music Company.

In the 1950s, a new vision incorporated live-action films, a television show and the beginning of its theme park franchise—all creative, innovative and profitable. For example, it released *Treasure Island*, Disney's first completely live-action feature, and debuted *The Mickey Mouse Club*, its Emmy Award-winning television show created by Walt Disney. Disneyland, the first Disney theme park, opened in Anaheim, California.

<sup>22</sup> Collins, J., & Porras, J. (1996, September/October). Building your company's vision. *Harvard Business Review*, 74.

<sup>23</sup> Sanders, M.M. (n.d.). Vision, Mission and Strategy. Retrieved July 6, 2015 from: <https://seehearspeak.com/articles.php?action=art&aid=17>

### *Example of the Interplay Between Core Purpose/Mission and Envisioned Future (continued)*

The mission remained unchanged in the 60s and 70s, and the vision largely continued on the same path as well. The company continued releasing creative films, such as *Mary Poppins*, and opened Walt Disney World and Magic Kingdom near Orlando, Florida. It also ventured into retailing, opening Walt Disney World Village, a large outdoor mall with specialty shops all built by Disney designers.

In the 80s and 90s, however, the vision morphed again. The company began an international expansion effort and started creating a portfolio of brands. For example, Tokyo Disneyland, the first international Disney theme park, opened in Japan; The Disney Channel began broadcasting and then expanded to the UK; and *Beauty and the Beast*, the first Disney Broadway show, opened in New York.

Since 2000, the vision has changed again to accommodate new technologies and new consumer tastes. Adapting to the internet age, *High School Musical* became the first full-length movie to be sold via digital download. The company also expanded its portfolio of brands beyond theme parks and resorts by venturing into cruise ships for families, and in 2011 the *Disney Dream* cruise ship made its maiden voyage. A year later, Disney acquired Lucasfilm, the entertainment company founded by George Lucas and the home of the legendary Star Wars franchise.

These are just some of the highlights—there are many more—but this short description shows how the purpose/mission of a company can remain the same, while the envisioned future changes with the times.

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<sup>i</sup> Information for this sidebar was retrieved largely from The Walt Disney Company's website:

<https://thewaltdisneycompany.com/about-disney/disney-history>

<sup>ii</sup> Mission Statement. (n.d.). Retrieved July 6, 2015, from <http://www.businessplans.org/mission.html>

<sup>iii</sup> Disney Company Profile. (n.d.). Retrieved July 6, 2015, from <http://disneycompanyprofile.weebly.com/>

## Creating a Motivating Vision

Most organizations have a vision statement for change, but that doesn't necessarily mean they have a true vision. Take the following vision statement as an example. Can you decipher it? Probably not.

Our goal is to position ourselves at the conjunction of the physical communication and E-commerce industries. Employing a paradigm shift strategy, we will empower our employees to better serve idiosyncratic customer requirements and facilitate increased mean ratings of staff and customer fulfillment on the national stage.<sup>24</sup>

This was an initial statement of a telecommunications company as it embarked upon a new technology strategy. I was working with the executive team and had asked each member to write down his or her conception of the vision on a piece of paper. Then I asked them to read the statements aloud to each other. They were shocked to find out the statements were all different. What's more, the statements were all

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<sup>24</sup> Initial vision statement for a strategic change in an unidentified company I consulted with.

incomprehensible and full of jargon, like the one above. After a lot of work they finally clarified what they really meant:

We will pull together IT and telecom into solutions our customers can afford, allowing them to grow their businesses by taking the complexity out of buying, managing and servicing their technology.<sup>25</sup>

From this experience, we all learned that creating a motivating vision is tough and takes a lot of time and effort. Our lessons:

- Vision creation is an exercise requiring both intellectual and emotional involvement.
- A good vision is simple, but the process to get to it is not. It is tough work.
- Taking the time to create a good vision is an investment in the future.
- The process of vision construction is key—garbage in, garbage out.

When organizational vision statements are long and confusing, they do not motivate change, much like the initial vision in the above example. They do not motivate because they lack the passion, emotion and conviction that are essential components of an effective vision. An excellent example of the power of vision is offered in Martin Luther King Jr.'s famous "I Have a Dream" speech. The following excerpt shows the passion, emotion and conviction he communicated:

Let us not wallow in the valley of despair, I say to you today, my friends.

And so even though we face the difficulties of today and tomorrow, I still have a dream. It is a dream deeply rooted in the American dream. I have a dream that one day this nation will rise up and live out the true meaning of its creed: "We hold these truths to be self-evident, that all men are created equal."

I have a dream that one day on the red hills of Georgia, the sons of former slaves and the sons of former slave owners will be able to sit down together at the table of brotherhood. I have a dream that one day even the state of Mississippi, a state sweltering with the heat of injustice, sweltering with the heat of oppression, will be transformed into an oasis of freedom and justice.

I have a dream that my four little children will one day live in a nation where they will not be judged by the color of their skin but by the content of their character. I have a dream today!

I have a dream that one day, down in Alabama, with its vicious racists, with its governor having his lips dripping with the words of "interposition" and "nullification"—one day right there in Alabama little black boys and black girls will be able to join hands with little white boys and white girls as sisters and brothers. I have a dream today!<sup>26</sup>

Considered one of the most influential and memorable speeches in American history, it truly illustrates the point that a powerful vision can move the world forward.

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<sup>25</sup> Reworked vision statement for the strategic change identified in previous footnote.

<sup>26</sup> American rhetoric: Top 100 speeches (n.d). Retrieved July 3, 2015, from <http://www.americanrhetoric.com/speeches/mlkhaveadream.htm>



## Five Rules to Create a Motivating Change Vision

So now we know that it is tough work to create a motivating vision, but I offer the following rules to make that work somewhat less arduous. Use these rules to create your change vision and subject it to honest and rigorous scrutiny.

### 1. Make it Clear and Easy to Understand

The telecom company executives in the above example had to rework their vision until they were satisfied that both employees and customers could understand what they were trying to achieve with their new strategy. If the senior executives are the only group that understands the vision, then what hope do employees have when they try to implement it?

### 2. Make it Appealing to Those Who Must Implement It

Not like the following vision statement, which is from a Fortune 500 firm that shall remain nameless: “We will build long-term shareholder value through competitive returns and profitable growth.”<sup>27</sup> Maximizing shareholder value is not a vision. It does not inspire people, and it provides little to no guidance.

### 3. Make it Vivid

A common flaw in corporate vision statements is that they are often flat and colourless. You need to paint a picture of the future, like Henry Ford or Martin Luther King Jr. in the above examples. Below is a typical flat and colourless vision statement of a real Fortune 500 firm, which I’ve renamed “XYZ.” It’s full of jargon and generalized goals. Employees would not get a vivid picture of the future this company is trying to create.

At XYZ, our vision is to be recognized as a pacesetter in creating sustainable value growth through innovative energy solutions and unique partnerships. To realize this vision, we are applying a differentiated business model that takes us beyond a conventional integrated oil business.<sup>28</sup>

In contrast, here is Microsoft’s 1980s vision, which certainly paints a clear picture and gives everyone a clear stretch target to aim for: “A personal computer in every home running Microsoft software.”<sup>29</sup>

### 4. Arouse Positive Emotion

One of the hardest things to do—but one of the most powerful—is arousing positive emotion with your vision statement. You can do this by invoking a higher purpose, a social good that you provide to society or to your customers and clients. Not like this one: “Our Vision: To establish ABC Energy as the premier regional integrated energy company by providing sustained earnings growth.”<sup>30</sup>

There is no sense of a higher purpose in the above statement, and it would not arouse positive emotions or a sense of pride in employees and other stakeholders. It is almost entirely internally focused. On the other hand, this statement from Google does invoke a higher social purpose: “To make the world’s information universally accessible and useful.”<sup>31</sup>

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<sup>27</sup> Kasowski, B., & Fillion, L. J. (2010, April). A study of the 2005 fortune 500 vision statements. HEC Montreal working paper, 2010-04.

<sup>28</sup> Ibid.

<sup>29</sup> Creating a vision for your organization. (2010). Retrieved July 3, 2015, from [sauk.uwex.edu/files/2010/06/CreatingAVisionforyourOrganization.doc](http://sauk.uwex.edu/files/2010/06/CreatingAVisionforyourOrganization.doc)

<sup>30</sup> Kasowski, B., & Fillion, L. J. (2010, April). A study of the 2005 fortune 500 vision statements. HEC Montreal working paper, 2010-04.

<sup>31</sup> Swayne, C. (2014). *How to make great decisions*. Bloomington, IN: Author House, 46.

## 5. Include Big (but Achievable) Goals

A great vision should include a BHAG, but it shouldn't be so big that people have no hope of achieving it. Here's a good example from Amazon; it certainly provides a big, hairy, audacious goal that the company is on its way to reaching: "To build a place where people can come to find and discover anything they might want to buy online."<sup>32</sup>

## Advice for Creating Your Vision Statement

It is easier to criticize the shortcomings of a vision statement after the fact than to create one in the first place. Here is some process advice for creating your vision:

1. Think about what your organization does, what, in an ideal world, you would like it to do, and how you would like to appear to the outside world. Imagine your organization at its very best.
2. Write some brief goals and statements that capture these ideas.
3. Write them into a coherent statement.
4. Test out the statement with a representative sample of stakeholders using the five rules above and obtain their feedback.
5. Rework the statement using the five rules until it sings!

If you get stuck, consider using some of the following for stimulating your imagination and creating a vivid, motivating description:

- *Future article in your professional association magazine.* Imagine and summarize a recent article that describes in glowing terms the implementation of the new vision, what it has done for your organization, the benefits to clients and other stakeholders, the wonderful results, etc.
- *Letter to our leader.* Write a letter to a beloved leader of the organization (present or past) that describes how this vision extends and fulfills the original mission.
- *Voice of the client.* Describe how the future has been improved for your clients as a result of this new vision.
- *A picture is worth a thousand words.* Draw a picture that illustrates how the vision has enhanced your organization and has resulted in benefits for your stakeholders.
- *Then and now.* Write a story that contrasts the present state with the (much better) future state after the vision has been achieved.

## Advice for Getting Stakeholder Input

Before you publicize the vision, you would be well-advised to get some stakeholder input about whether or not it is motivational to them. Using the five rules, ask for feedback in one or more of the following ways:

- Hold focus groups or café discussions with stakeholders to get feedback about the vision.
- Send the vision to stakeholders or put it on your website and ask for feedback.

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<sup>32</sup> Amazon.com (n.d.) In *Facebook* [About page]. Retrieved July 3, 2015, from [https://www.facebook.com/Amazon/info?tab=page\\_info](https://www.facebook.com/Amazon/info?tab=page_info)

- Talk to opinion leaders one-on-one and ask for complete frankness.
- Take an anonymous survey of stakeholders with specific questions about the vision.

## Advice for Communicating Your Vision Statement

A vision cannot motivate if nobody knows what it is. Don't bury it in long corporate documents. Here are some proven methods for communicating the vision:

- Enlist the senior leaders to sell the change vision within their areas or to commit to a "road show" to communicate it more widely.
- Require each department and/or area to develop a business plan that describes how they will begin fulfilling the vision over the next year.
- Have the organization's leader meet one-on-one with each senior manager to ask for their buy-in and to set change-related targets.
- Adjust performance measures (like the balanced scorecard, for example) and hold people accountable for specific results.

If you follow this advice, you should be able to create a truly motivational change vision, but be prepared to do the hard and tough work necessary. It will be worth it. And if you want to try out your newfound knowledge on a hypothetical case before experimenting with your own change initiative, read the following case study and answer the accompanying questions. This exercise will give you some idea of how well you have absorbed this chapter's lessons.

## Case Study: Developing a Change Vision at Grand Lakes

Let's follow a company and provide advice as it tries to develop a great change vision. This case study is a composite of several utilities that I have researched or provided consulting services to.

Grand Lakes Power and Light is an electrical utility providing power to a large region comprised of several communities, large and small, concentrated in an urban area. Grand Lakes serves approximately five hundred and twenty-five thousand residences and business locations. It is managed by a private corporation owned by the communities that it serves, but it is regulated by a provincial energy board. The provincial energy board is charged with overseeing all electrical utility companies, ensuring marketplace fairness, network reliability and consumer protection.

Recently, there has been a noticeable shift in social attitudes, and Grand Lakes is experiencing strong pressure to adopt more sustainable development and environmentally-friendly policies and procedures. Senior management knows it has to respond to these pressures in a timely manner, so it has set up a task force to make recommendations to move the utility towards sustainability.

The most important issue identified was energy consumption. The task force recommended initiatives to help customers reduce their energy usage as well as ideas for generating energy savings in Grand Lakes' own facilities, vehicles and equipment. The task force also recommended ideas for reducing greenhouse gas emissions and environmental spills. The senior executive accepted these recommendations, and Grand Lakes is planning to roll out new sustainability initiatives as part of its strategy. Now Grand Lakes is asking for the task force's advice on one part of that strategy — the new vision statement for the sustainability initiative.

Below is a preliminary vision statement that the CEO sent to the task force. What we now have to do is give the executive feedback about the vision so the task force can improve it and make it sing. The executive will not be insulted by any negative feedback we give; she realizes it needs a lot of work.

We will be recognised in the Grand Lakes community as the leader in sustainable development by ensuring the highest standards of environmental responsibility and energy efficiency are maintained, thereby delivering on our mandate of corporate social responsibility.

Does the vision statement above follow the five rules for creating a great change vision (clear and easy to understand; appealing to those who must implement it; vivid; arouse positive emotion; include big, but achievable, goals)? Write down your answers and then check out the Appendix for my take and another exercise.

You have already read how vision can help grow a private sector company at the beginning of this chapter. But a change vision can also save an organization in peril. The following case study shows how vision saved an entire community.

## Case Study: George Farkouh Translates Vision into Action and Saves Elliot Lake<sup>33</sup>

The history of the City of Elliot Lake is one of great ups and downs. A single-industry town remotely located in northern Ontario, Elliot Lake almost died during its last downturn. Only the single-minded vision and passion of its mayor, George Farkouh, and the followers he inspired saved it from becoming a ghost town.

Elliot Lake was founded in 1955 after a large ore body of uranium was discovered in the area. For the better part of the next forty years Elliot Lake produced much of the world's supply of uranium, and so the local economy was almost completely dependent on the extraction, world demand and price of uranium. The expansion of the nuclear power industry in the late 1960s created a uranium boom that peaked in the 1980s. By the mid-1980s, the population had increased significantly to eighteen thousand.

But storm clouds appeared on the horizon. Uranium of a higher grade and a lower extraction cost was discovered in Saskatchewan, and in short order Saskatchewan accounted for 48.3 percent of Canadian uranium output. The price of uranium began to float, and Elliot Lake's mines could not continue to operate profitably at the lower price. At the time the Elliot Lake mines began to close, they were producing uranium at about \$40 per pound, while the Saskatchewan cost was about \$6-\$7 per pound and the world price had slumped to about \$9 per pound.

By 1991, unemployment had risen to 60 percent and the population had begun to decline significantly. The generous core services that the city had built up during prosperity were now threatening to bankrupt it as tax revenues declined with a shrinking population. Elliot Lake, as of 1994, faced the largest single industry collapse in Canadian history. There looked to be no future for the city, the residents were despondent, and something had to happen or Elliot Lake would soon become a ghost town. This major threat served as a catalyst for change.

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<sup>33</sup> Case study based on personal interviews with George Farkouh in 2006. (I am grateful to Kate MacKenzie for her help with this case study).

In the summer of 1985, George Farkouh, who had recently sold his interest in a successful car dealership, had time on his hands, and he used some of it examining the city's financials. "I concluded it was bankrupt," he recalls, and he went to the local newspaper to voice his opinion. "My good friend Mike [editor of the *Elliot Lake Standard*] told me to do something about it, so I ran for council, and I won." He was subsequently elected mayor in 1988, but his celebrations were short lived. In January of 1990, the mines announced they would be closing operations.

Farkouh had unique credentials for the task he undertook as mayor of Elliot Lake. Among them, an MBA from a prominent Canadian business school, a stint in the corporate finance department of a major bank in Toronto and a long entrepreneurial career running a successful car dealership. He had deep roots in the city, a desire to make a place for his family in the future and a wish to help citizens of his hometown.

## **A Compelling Vision**

From the beginning, Farkouh had a mental picture of Elliot Lake's transformation: "I saw a vision of Elliot Lake balanced and diversified, independent of mining, a 'jewel in the wilderness' . . . We needed to avoid the boom and bust, to take it in a new direction and keep it stable and healthy, economically and physically, a good place to raise a family and to retire."

But one person, no matter how passionate and committed, cannot achieve a feat like the turnaround of Elliot Lake alone. A vision must be compelling enough such that followers can embrace it and be motivated to work towards it, and the best way to create and communicate the vision is by involving people. Farkouh knew from the beginning that he needed both the community leaders and citizens to share in the vision. "I provided them with a roadmap for the process. I credit the process to the people themselves. Initially it was difficult to get through to people in crisis—they wanted an instant solution. But we followed a process. We recruited hundreds of volunteers who contributed their ideas. We worked them into our vision." The vision of the future had to be based on the strength of the community, its environment and its strategic position in terms of transportation and proximity to major markets. "[We had to] look at all aspects of the community that might have been overlooked in the past . . . Empower the citizens to look toward the future with hope."

As part of this initiative, workshops were held with approximately one hundred and fifty local citizens to gain input on the advantages and disadvantages of various methods of attracting industries. The main themes that emerged from the workshops were:

1. Development of training and support programs
2. Creation of the Elliot Lake Retirement Living program
3. Retention, expansion and attraction of business
4. Initiatives to increase the role of tourism
5. Environmental (Denison Environmental)
6. Addiction Treatment & Rehabilitation Centre

Soon after, city council adopted the final report containing a strategic economic development plan with a mission statement and a series of big, hairy, audacious goals and objectives. The report also called for massive efforts from municipal, provincial and federal politicians, as well as local businessmen and organizations to attract new businesses to the area and widen the markets served by existing businesses. From that point, the plan was broken into components and each one given to a sub-committee. "I was their guide but gave them lots of independence," says Farkouh. "I met with the chairs of these committees. It was almost like a pyramid consisting of a lot of volunteers." With this independence came an inspired and passionate group of followers who were given the encouragement and freedom to engage in realizing the vision and strategy. "We had to

create a plan of action with three pillars: financial, social and hope for the future,” says Farkouh. “I could write a book on each, but the social part was the most important.”

The financial vision rested on restructuring the city’s finances, ensuring it could pay its bills, continue to provide services and get out of debt as soon as possible. To solve the problem, the city embarked on a cost-cutting initiative and simultaneously started growing a reserve fund. The city tapped four sources of financing for this reserve fund: cost savings, government assistance, Ontario Hydro and the mining companies. To help ease the strain of the layoffs on the city’s operating budget, municipal officials prepared a cost profile of all city operations in order to make cost-cutting decisions easier as the local economy shrank. Luckily, Elliot Lake also had a relatively large commercial tax base mainly consisting of properties owned by the mining companies. By 1993, the city became debt free, and by 2004, the city had \$1 million in surplus and \$13 million in reserves. Total employment income had reached \$250 million, up from \$230 million in 1990 near the beginning of the crisis. “I am immensely proud of that,” says Farkouh.

The social pillar of the action plan anticipated the potential social crisis in the community as a result of the mine closures. Its goal was to maintain the social infrastructure and services after the closures began to impact the personal lives of some residents. The miners of Elliot Lake lost more than income; they lost a sense of identity, pride, colleagues, benefits and confidence in their ability to provide for a family. Many battled against substance abuse and a sense of hopelessness, and they faced pressures to change careers entirely, retire early or move away. “The social pillar was the most important,” says Farkouh. “We got the province to assist. For example, we placed a social worker in each school to help intercede if a family was in crisis and opened a teen drop-in centre.” There was also an active steering group whose mandate was to decide how to spread the resources obtained from various sources. Federal funds helped miners go back to school to get high school equivalency diplomas, and even if all of them did not secure jobs from retraining, it “helped with their attitudes,” says Farkouh. “We avoided a lot of suicides and family violence through these initiatives.”

The final pillar was hope for the future. Throughout the difficult times, it was important to instill a sense of hope in the citizenry. Farkouh says the hardest part was to keep the community motivated and convinced there was a future for them in the community. Aware of the need to elicit trust and credibility, the message Farkouh sent out to the community was: “If you hold out with us on the strategy we are following, we will achieve success.” The city had to give hope to its citizens that there would be a future beyond the closure of the mines. “Community leaders have to project confidence that there is life after mining,” said Farkouh. To do this, the municipality created a tabloid every two months that shared with its citizens the various projects and the number of success stories that were happening throughout the adjustment period. And as time went by, there were more and more good stories to tell.

Farkouh points out that from the very beginning they followed a process of developing a vision, mission statement, set of goals, and then revisiting and revising them for the next fifteen years. Between 1990 and 2006, Elliot Lake City Council passed eighty-four hundred resolutions, which averaged out to over five hundred per year. It is estimated that at least five thousand of these resolutions were directly related to restructuring Elliot Lake’s economy by improving its infrastructure, encouraging venture tourism initiatives, aiding business development and securing better health, shopping and cultural services for its citizens.

One of the fundamental and most successful and innovative parts of the strategic plan was the Retirement Living initiative. In 1987, Claire Dimock, a local councillor and a senior executive at Denison Mines, worked with a group of community leaders and came up with the idea of marketing the mines’ vacant housing stock to retirees. By 1991, an independent not-for-profit organization, Elliot Lake Retirement Living, was incorporated with the mandate to acquire and manage the unoccupied residences left by the miners.

Having the units was one thing, selling them another. Elliot Lake already had the civic infrastructure for a city twice its size, with lavish amenities, such as arenas, tennis, schools, buses, etc., and it offered a higher level of municipal services than most other Ontario cities of its size. These were to serve as a selling advantage to potential new citizens. The city positioned itself to become Canada's senior citizen capital, and by 1989 eight hundred and seventy new retirees had moved into the community. But that was just the beginning. By 1995, Retirement Living had become a \$6 million business with seventeen full time employees and twenty-five additional workers. By 2006, Retirement Living was managing fifteen hundred housing units, a mall, a golf club and a hotel complex. And by 2006, more than four thousand people had retired to Elliot Lake from across Canada, the United States and Europe.

Success came because of Farkouh's vision for the City of Elliot Lake and because of the way he got massive participation and buy-in. The change leaders made sure all parts of the future vision were aligned and fit together, and then they proceeded to implement the change enthusiastically. They all transformed Elliot Lake from a troubled mining town into a successful retirement community and tourist destination with a bright future. It indeed became a "jewel in the wilderness."

## Parting Thoughts

Creating a motivating vision is an important step on the way to the successful implementation of a change initiative. It should not be taken lightly, so don't throw together a bunch of words and hope they will resonate with stakeholders. Take the time to craft stretch goals and a vivid description of the desired future; use the five rules to make them clear and compelling for your stakeholders; get feedback; and revise them until they sing. Do all of this tough work before you roll out the change, and you will be delighted at how much more smoothly and quickly implementation proceeds.



## Appendix

Is the vision:

1. Clear and easy to understand? No. The following statements can be interpreted differently or are unclear:
  - a. “[T]he highest standards of environmental responsibility and energy efficiency.” Compared to what standards? What measures?
  - b. “[O]ur mandate of corporate social responsibility.” What mandate? It has not been defined.
2. Appealing to those who must implement it? Maybe. Many people would be proud to be part of an organization that is a “leader in sustainable development” and that has “the highest standards of environmental responsibility.” The energy board will like it. But some could be cynical about these statements because they sound like motherhood statements that could be espoused by almost any organization. The company will have to live up to these statements to avoid cynicism.
3. Vivid? Does it paint a picture? No. There are no vivid words or concrete images in the statement. It is totally conceptual.
4. Arousing positive emotion? Does it invoke a higher purpose? Maybe. It invokes a higher social purpose than just distributing electricity. But the statement is too bland to arouse much emotion.
5. Including big (but achievable) goals? Maybe. There are some big goals, such as “achieving the highest standards of environmental responsibility” and “delivering on our mandate,” but are the goals achievable? They are too broad, and it will be difficult to measure whether they are achieved in the future. Goals need to be SMART (specific, measurable, attainable, relevant and time-bound) to work well.

Can you do better? The task force needs to rewrite this vision statement. What improvements would you make?

### A Good Example of a Sustainability Vision Statement

Herman Miller, Inc., based in Zeeland, Michigan, is a major American manufacturer of office furniture, equipment and home furnishings. Below is its sustainability statement,<sup>34</sup> which may be a bit long and not very vivid, but the goals are clear and easy to understand, appealing to stakeholders, big, and invoking a higher purpose.

Our new 10-year sustainability strategy, Earthright, begins with three principles: positive transparency, products as living things, and becoming greener together. We have sharpened our goals around the smart use of resources, eco-inspired design, and becoming community driven. Most importantly, we are finding new ways to involve more employees, suppliers, and customers.

Our commitment is to achieve the following goals by 2023:

- Zero waste
- 50% reduction in water use (30M gallons)
- 50% reduction in energy intensity
- 50% more local renewables (50,000 mwh)

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<sup>34</sup> Herman Miller - Our Vision and Policy. (n.d.). Retrieved July 6, 2015, from: <http://www.hermanmiller.com/about-us/our-values-in-action/environmental-advocacy/our-vision-and-policy.html>



- 100% Design for the Environment-approved products
- 100% level 3 certified products
- 125,000 tons of product taken back per year

## About the Author



**Carol Beatty** is former Director of the Industrial Relations Centre at Queen's University at Kingston, Ontario, and an Associate Professor with Queen's School of Business, where she has taught in undergraduate, graduate and executive education programs.

An acknowledged expert on change management, strategy development, high performance teams and facilitation, Dr. Beatty focuses her consulting on human and organizational issues in modern organizations. She has studied the implementation of change for over 25 years, including technological change, strategic change, mergers and acquisitions, structural change, and employee buyouts.

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Carol is a sought-after consultant and speaker who has helped many private and public sector organizations become more effective. She is a trained facilitator in Future Search (Weisbord and Janoff) and Whole System Change (Dannemiller Tyson).

Recent publications include *Building Smart Teams: A Roadmap to High Performance Teams* (2004 with B. Barker), and *Employee Ownership: The New Source of Competitive Advantage* (2001 with H. Schachter). In addition, Dr. Beatty has authored several complex multimedia business simulations used in high-level human resources education: Panorama at the Crossroads, Change-O-Meter, and Harmon Health.

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