

Developing foresight through the evaluation and construction of vision statements: an experiential exercise

Developing
foresight
through the
evaluation

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Abstract

Purpose – Scholars and practitioners generally acknowledge the crucial importance of visions in motivating and inspiring organizational change. In this article, we describe a two-part activity based on visionary leadership scholarship and theory designed to teach students to cultivate foresight and consider future possibilities through the organizational vision statement development process.

Design/methodology/approach – Using an experiential design, the exercise draws on several empirically validated techniques to encourage foresight and future thinking, to help students place themselves in the shoes of the chief executive officer of a hypothetical organization and use dramaturgical character development strategies to craft the vision statements that they will champion.

Findings – The exercise has been used in three different business courses ($N = 87$) and has been well received.

Originality/value – The content of the exercise is adaptable to a variety of courses in which leadership and vision are focal topics – such as organizational behavior, strategy and leadership – and could also be modified for an online classroom setting.

Keywords Leadership, Experiential learning, Future thinking, Mental time travel, Vision statement, Vision

Paper type Research paper

Developing foresight through the evaluation and construction of vision statements

The past cannot be changed. The future is yet in your power. – Unknown.

The ability for leaders to construct and communicate an inspiring image of the future is an element highlighted in numerous leadership theories (Bass, 1985; van Knippenberg and Stam, 2014) and an important aspect of business strategy development more broadly (Carton, Murphy and Clark, 2014). One of the ways in which leaders articulate their visions



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is through the development of organizational vision statements (Collins and Porras, 2002). Indeed, vision statements offer a unifying framework for organizational members that engender identity creation, meaning and help to align various objectives and priorities together into a succinct pronouncement (Lucas, 1998; Shamir, House and Arthur, 1993).

Vision statements, which may be defined as “a shared, communicated, idealistic idea of the long-term future of an organization” (Kirkpatrick, 2016, p. 2), serve to motivate followers and help organizational members coordinate and direct collective effort toward a desirable end state (Berson, Halevy, Shamir and Erez, 2015; Berson, Waldman and Pearce, 2016; Carton *et al.*, 2014; Shamir *et al.*, 1993). Indeed, numerous studies have demonstrated the positive effects of vision statements in the prediction of employee (Fiset and Boies, 2019; Sosik and Dinger, 2007), team (Boies, Fiset and Gill, 2015) and organizational performance outcomes (Baum, Locke and Kirkpatrick, 1998; Kantabutra and Avery, 2010; Kirkpatrick, Wofford and Baum, 2002). This effect is contingent, in large part, upon the proportion of various structural and content characteristics contained within each vision statement (Carton and Lucas, 2018; Kirkpatrick, 2016).

Importantly, a growing stream of research has demonstrated that the capability to articulate an imagined future and make it relevant to the present is a skill that can be fostered in others (Miller, 2007, 2018). By the same token, the literature suggests that the ability to craft and communicate an inspirational organizational vision can be both developed in the classroom (Quijada, 2017) and experimentally (Carton and Lucas, 2018; Shipman, Byrne and Mumford, 2010). Given that a number of characteristics have been identified as important for well-articulated organizational vision statements, we present a pair of interrelated exercises designed to introduce students to the concept of vision statements and help them to develop the ability to both analyze existing vision statements based on the characteristics of strong visions identified in the literature (Exercise 1) and draw upon these characteristics to create compelling visions through the construction of effective vision statements (Exercise 2). Each exercise is first overviewed below, followed by a summary of the development of and experiences with, the activity.

Overview of the exercises – developing skills to evaluate and craft vision statements

The aim of the first exercise is to familiarize students with the key characteristics of strong vision statements and to provide them with the opportunity to use this knowledge, by assessing the degree to which each characteristic is reflected in the vision statements from six well-established organizations. The material related to these characteristics is derived from two frameworks, developed by Kirkpatrick and colleagues (Baum *et al.*, 1998; Kirkpatrick, 2016, 2017) and Carton and Lucas (2018). More specifically, Kirkpatrick’s work outlined four required characteristics (clarity, future focus, abstractness, challenge and idealism) and three optional characteristics (brevity, uniqueness, achievability/definition of success) of strong vision statements (2016, 2017). Additionally, in a recent review by Carton and Lucas (2018), the authors identified four key characteristics – values, specificity, imagery and achievability – that align well with those outlined by Kirkpatrick (2016) and previous research (van Knippenberg and Stam, 2014). This first exercise, therefore, serves to provide an introduction to the characteristics of strong vision statements, as outlined in the literature, by having students use each component to evaluate a list of existing corporate visions.

Building on the above, the purpose of the second exercise is to provide students with the opportunity to put their knowledge of the characteristics of effective visions into practice, via the creation of a new vision statement. Participants first form small groups and read

vignettes describing two hypothetical organizations. Each group then selects one of the organizations and tackles a series of questions – designed to draw on the dramaturgical technique of character development and research on futures literacy (Miller, 2007) and mental time travel (Suddendorf, Addis and Corballis, 2009) – that help members to place themselves in the position of the chief executive officer (CEO) of the organization that they selected and then develop a vision statement for that company.

As such, this second exercise integrates work from both dramaturgy and management education to help students place themselves in the shoes of a CEO tasked with crafting a persuasive vision statement (Boggs, Mickel and Holtom, 2007; Leberman and Martin, 2005) and encourages them to use a number of character development activities to facilitate this process. More specifically, students begin by reading through several questions that are designed to help them construct the identity of a CEO of the organization and imagine themselves as that character. This, in turn, serves as the foundation upon which they will later draw as they develop a vision statement for the organization in question.

As an overarching framework, we draw on Huddle's (1991) guidance of continuously probing and asking questions to facilitate character development and develop a greater understanding of what is likely to inspire those used by the hypothetical organization. We further incorporate Wirth's (1994) character, relationships, objectives, where method to provide students with a framework through which they can effectively develop a fabricated CEO for their organization. In particular, this method describes four major components of character development, as outlined by the aforementioned acronym:

- (1) the *character* and all of their constituent parts (e.g. values);
- (2) the character's *relationships* and how they deal with others and the environment (e.g. employees, customers, environmental stewardship);
- (3) their key *objectives* or the defining needs or wants (e.g. organizational growth); and
- (4) *where* or the location and context where the character operates.

The exercise integrates each of these dramaturgical techniques by asking students to respond to a number of specific questions about the hypothetical CEO.

In addition, to the character development component described above, this second exercise incorporates several tools to help improve foresight in students. In particular, it integrates both the literature related to futures literacy (Miller, 2007) and the concept of mental time travel (Suddendorf *et al.*, 2009) to encourage students to mentally place themselves at a point in the organization's future to be able to better describe its desired end state to followers and other organizational stakeholders (Carton and Lucas, 2018). Defined as "the capacity to explore the potential of the present to give rise to the future" (Miller, 2007, p. 347), futures literacy is a learned ability that can improve the capacity to anticipate future needs and serves as an effective framework to develop effective future action and strategy (Miller, 2007; Miller, 2015). This capacity, characterized as the culmination of three key characteristics – awareness, discovery and choice – is an important way of evaluating future directions. *Awareness* deals with establishing both situational and temporal awareness by ensuring that values and expectations of the future are explicitly stated. *Discovery*, defined as "the capacity to overcome the limitations imposed by values and expectations when thinking about the future" (Miller, 2007, p. 350), is the process of rigorous imaging whereby participants determine the potential of desired end states as either possible, probable or preferable. Finally, *choice* integrates the insights developed from the analysis of the aforementioned components (awareness and discovery) to reach a consensus on a desired end state and link it to action. Paired with mental time travel or the ability to mentally

project oneself backwards or forwards in time (Suddendorf and Corballis, 1997), this process enables students to better envision and articulate a future that is inspiring to others (Carton and Lucas, 2018).

Development of and experiences with, the activity

Originally designed in the context of a specialized graduate leadership class taught by the first author, the activity has also been used in two other courses – namely, a different graduate skills-development class and an undergraduate class on organizational behavior – taught by the same author. Given its focus on vision content, it could easily be used as a tool to outline specific aspects of corporate strategy and leadership vision in other courses in which the topics of organizational vision and/or visionary leadership are covered (e.g. strategy, leadership) at the undergraduate or graduate levels.

The activity has been run by the first author on three occasions – once in each of the three courses described above – and was generally well-received by students. Indeed, the exercises stimulated interesting discussion on the importance of vision statements and the effectiveness of visions in organizational life. The data collected with participants from the three classes ($N = 87$), discussed in more detail in a later section of the paper, suggests that students felt that the exercise helped them to learn about the process and importance of vision statements.

We now present a detailed description of the learning objectives and steps to run the activity. We next outline several discussion questions that may be used in the debriefing session, along with reflections on the discussions that have emerged over the course of the first author's experiences with the activity. Finally, we conclude by presenting data collected from the three sections in which the activity was run that speak to its effectiveness.

Description of the exercise

Learning outcomes

At the end of the set of two exercises, students should be able to:

- (1) *Identify* and *describe* both required and optional vision statement characteristics.
- (2) *Integrate* the aforementioned vision characteristics to *evaluate* and *develop* persuasive, future-oriented and inspirational vision statements.
- (3) *Reflect* on the importance and impact of organizational vision statements on stakeholders.

Materials

Prior to class, instructors should:

- Identify and assign key readings that will provide students with the background knowledge to complete the activity (Appendix 1 for a list of suggested readings).
- Prepare any supporting materials to be distributed to students (Appendix 2 for a sample handout that provides students with information regarding required and optional characteristics of effective vision statements, as drawn from Carton and Lucas (2018) and Kirkpatrick (2016), that may be distributed to students).
- Prepare copies of the worksheet for the first exercise (Appendix 3) for all participants. Instructors may also wish to print a personal copy of the accompanying instructor note (Appendix 4).

- Print copies of the instructions and materials for the second exercise for all participants ([Appendix 5](#)).

Running and debriefing the exercise

An overview of the steps of the activity and the approximate time required for each, is presented in [Table 1](#). While the two exercises can be completed in a 90-min class – assuming that the background readings have been assigned to participants ahead of time – it is also possible to truncate the amount of time required for the activity by asking students to complete Exercise 1 beforehand. Indeed, this adapted format was used in a 75-min undergraduate class to great effect, such that students worked on the first exercise prior to the meeting and then completed Exercise 2 and all discussions in class.

Exercise 1

Before reviewing the instructions for the first exercise, it can be useful to review the key characteristics of effective vision statements with students. For example, instructors might choose to recap the assigned readings using a mini-lecture format or opt to encourage students to build the list of key characteristics themselves by posing open-ended questions on the importance of visions in organizational life and the elements of strong vision statements.

Next, present and distribute the worksheet for Exercise 1 to all participants ([Appendix 3](#)). Students then rate each of the six vision statements from real-life organizations on the degree to which each contains the required and optional characteristics of vision statements outlined by both [Carton and Lucas \(2018\)](#) and [Kirkpatrick \(2016\)](#), using a three-point scale (where 2 = fully characteristic of the vision statement, 1 = partially characteristic of the vision statement and 0 = not at all characteristic of the vision statement).

In the plenary that follows, students elaborate on the merits of each vision statement and attempt to determine the companies to which each statement belongs. Several sample discussion questions are presented below. To make this debriefing session more interactive, instructors may opt to ask students to vote on some (or all) of the questions, using a voting system (such as an online voting platform) or by recording their answers on the board, before delving further into a discussion of their answers:

- Can you identify specific required/optional characteristics from the list of vision statements?
- What aspects of each vision statement (positive or negative) stand out to you?
- Would you work for any of these organizations based on their vision?
- Which statements did you rate highest and lowest?
- Can you guess the company and/or industry that each vision statement belongs to?

Instructors can then reveal the names of the organizations that crafted each vision statement ([Appendix 4](#)). Asking students to guess the origins of each vision statement serves the dual purpose of encouraging them to reflect on the efficacy of each vision and consider whether it is consistent with what they know of the organization. In line with learning objective #3, instructors can also prompt students to reflect on whether a motivating vision statement that has little to do with an organization's operations would have the same impact on stakeholders as one that is more aligned. Instructors can then discuss the degree to which each vision statement was rated as reflecting the characteristics of strong visions, presented earlier.

Step	Description	Approximate timing
Preparation Step 1 Presentation of the key characteristics of vision statements	Assign readings, to be completed before class (Appendix 1), that will provide participants with the background knowledge for the exercise. Be sure to ask students about: Whether they are aware of any organizational visions; To describe – based on the readings – the components of effective vision statements; The importance and significance of organizational visions on individuals and institutions; and The key characteristics of vision statements (Appendix 2 for a sample handout that may be distributed to students)	Students complete readings prior to class
Exercise 1 (30 min) Step 2.1 Instructions and general overview of the activity	Provide participants with the instructions for the first exercise. Optionally, share past student reactions to the exercise (described in more detail in the section on the effectiveness of the exercise) to give participants an overview of the topics covered in the activity and its usefulness for learning about vision statements	5 min
Step 2.2 Students assess the vision statements	Distribute copies of the worksheet (Appendix 3) to students and ask them to complete the worksheet individually	10 min
Step 2.3 Plenary discussion	Reconvene for a plenary discussion. Inquire about their perceptions related to the merits of each vision statement, whether they can identify the organizations to which each vision statement applies and their suggestions of ways in which each vision statement could be improved	15 min
Exercise 2 (60 min) Step 3.1 Instructions	Provide participants with the instructions and materials for the second exercise (Appendix 5)	5 min
Step 3.2 Character development and vision creation	Ask participants to form small groups (4–5 colleagues) and briefly overview each of the two hypothetical organizations (drawing on the vignettes included in Appendix 5). Ask teams to first select one of the hypothetical organizations and then: Reflect on and discuss the questions in Part 1 (awareness of the character) by imagining themselves as the CEO of the company and getting “in character” by projecting themselves into this role. Reflect on and discuss the questions in Part 2	20 min

Table 1.
Steps to run the activity

(continued)

Table 1.

Step	Description	Approximate timing
Step 3.3 Presentations	(awareness of possible futures for the organization) by considering and evaluating desirable end states for the organization Reflect on and discuss the questions in Part 3 (organizational direction) to finally craft an organizational vision statement Ask each group to write their vision on the board or, in the case of larger classes, post it on an online class forum or use collaborative software to facilitate the discussion You can also ask each group to provide a brief outline of their CEO character and vision statement or select a sample of particularly well-written vision statements to read to the class	Approximately 15 min (but timing will vary depending on the number of groups)
Step 3.4 Plenary discussion	Ask participants to assess the degree to which the vision statements presented by the class reflect the key characteristics of effective visions (described in the first exercise). Encourage participants to describe their main take-aways from the activity and elaborate on both the wider role of vision statements and the tensions that exist between ensuring that the vision is both relevant and distinct (see sample questions in the section “running and debriefing the exercises”)	20 min

Indeed, some of the vision statements included in the exercise appear to include more of these key characteristics than others. To add to this discussion, we surveyed 15 experts in the fields of leadership and organizational behavior (53% women) and asked them to evaluate the extent to which each vision statement represented the identified characteristics. Overall, the judges rated three vision statements (#1, 2 and 5) as high and three vision statements (#3, 4 and 6) as low on these metrics (Appendix 4 for a summary of the assessments of the expert judges). Interestingly, the judges demonstrated far more variance in their scoring for required characteristics compared to the optional characteristics. Students may, therefore, discuss whether their ratings were in agreement with those of the expert judges. Additional discussion questions that may be posed during this section of the plenary include:

- Now that you know the identity of each organization, does this change your evaluation of their vision statement?
- How aligned is each vision statement with what you know about the organization?
- Do you believe any of the vision statements described in this exercise have the capacity to inspire members of their respective organization? In cases where you do not believe this to be true, how would you improve them?

Exercise 2

Using an experiential learning approach (Kolb, 2015), the second exercise asks students to project themselves into the shoes of the CEO of one of two hypothetical companies and

design a vision statement that is suitable for that organization. The exercise opens with an overview of each of the hypothetical organizations (see the vignettes included in [Appendix 5](#), which include a brief description of the company and the industry, size and core values). Students first form small groups and select the organization on which they will focus for the remainder of the exercise. Next, using the steps outlined in the worksheet, members work together to systematically develop a greater understanding of their organization through the character development of the CEO and futures thinking and mental time travel, to ultimately develop a vision statement for the firm.

To this end, participants complete a character development activity for the CEO of the organization that they have selected, which aims to both help them create an identity for both the CEO and the organization and place themselves in the place of the top executive of the company. Members then consider the future of the organization through rigorous imaging and mental time travel ([Carton and Lucas, 2018](#); [Miller, 2007](#)), which encourages them to situate themselves directly in the desired organizational future and offers an important basis for viable vision statement development ([Shipman et al., 2010](#)). Finally, drawing upon these character development and mental time travel steps, groups craft a vision statement for the organization that describes a desired end state for the organization – taking special care to integrate the characteristics of effective vision statements described by [Kirkpatrick \(2016\)](#) and [Carton and Lucas \(2018\)](#), as discussed in the first exercise. Optionally, instructors can ask each group to compose a brief description of their organization, the CEO character that they developed and their vision and invite members to either note this information on the board in class or, in the case of larger classes, post it on an online class forum or use collaborative software to facilitate the discussion.

Depending on the size of the class, instructors may then either ask for volunteers to present their CEO character and vision statement visually (on the board or via shared document). This ensures that students are provided with a visual reference to evaluate vision content. Sample discussion questions for the plenary that follows include [1]:

CEO character development discussion questions:

- How difficult was it to project yourself into the shoes of a corporate CEO?
- Tell me more about the CEO character(s) that you developed? In what ways were they similar/dissimilar to you?
- Did imagining yourself as the organization's CEO help you to develop your vision statement? How do differences in how the CEO character was developed affect the dialogue around the organization vision statement development?

Vision statement discussion questions:

- How would you describe, in your own words, the required and optional characteristics of vision statements?
- Choose one of the required characteristics that is integrated into your vision and explain how you incorporated it.
- Similarly, choose one of the optional characteristics that is integrated into your vision and explain how you incorporated it.
- Explain which (if any) characteristics are missing from the statement that your group developed.
- What is the desired future end state of each of the organizations outlined in the exercise?

- Was there a particular characteristic or set of characteristics that you focused on while developing your vision statements?
- Did placing yourself in the future facilitate the development of your vision statement?
- What additional aspects of the organizations in question do you wish that you had access to prior to developing the vision statement?
- What type of potential employees do you think would be inspired or interested to join your company based on your vision statement?
- How might this vision statement impact key stakeholders?

Among the notable dynamics that emerged while running the activity, it appears that the process of developing a CEO character for the organization in small groups helped members to consider a wider variety of hypothetical leaders (working with colleagues encouraged participants to go beyond basing the character on themselves). Some teams, for example, chose a celebrity as their leader (e.g. Steve Jobs, Greta Thunberg) so that all members would have a mutual understanding of the CEO. In contrast, other teams simply focused on specific characteristics that would serve to guide the leader's actions (e.g. the new CEO of the elevator company requiring a wheelchair paired with a new vision around accessibility).

Effectiveness of the activity

Data were collected from 87 students (59% women), averaging 25.13 ($SD = 9.12$) years of age, who participated in the exercises in three different classes (two graduate sections and one undergraduate section) at a large comprehensive university. To examine their perceptions related to the effectiveness of the two exercises, we asked students about their overall evaluations of the activity and whether their learning was consistent with our learning objectives. More specifically, respondents indicated their agreement with six statements (sample item: "overall, the exercise helped me to learn about vision statements"), using a five-point scale (where 1 = strongly disagree to 5 = strongly agree). The responses, summarized in [Table 2](#) below, indicate that students were in general agreement about the ability of the exercise to deliver on the key learning objectives around developing vision statements.

Question	Mean	SD
The materials used in the first part of the exercise helped me to better understand the characteristics of effective vision statements	4.40	0.80
The techniques incorporated into the second part of the exercise helped me to better understand the importance of future-oriented thinking	4.48	0.54
Overall, the exercise illustrated the influence of vision statements on organizational members	4.42	0.73
Overall, the exercise helped me to learn about vision statements	4.58	0.50
Overall, the exercise facilitated a better understanding of the organizational vision statement development process	4.51	0.68
Overall, I learned a lot from this exercise	4.56	0.54

Note: $N = 87$

Table 2.
Student reactions to
the vision exercise
learning objectives

Variations

Given that the activity is separated into two exercises, it would be possible to adapt its delivery in a number of ways to accommodate time constraints. As described earlier in the paper, instructors could streamline the activity by assigning the first exercise to be completed before class, to focus only on the experiential component (Exercise 2) in person. Moreover, though the exercises were designed as a set, instructors could elect to incorporate but one of the activities in a given class, depending on the learning objectives of the course and the time available for the exercise. Additionally, the activity could easily be modified for an online course by having students use collaborative word processing and video chat software.

The second exercise could also be adapted in a number of ways. Instructors with limited time may choose to incorporate well-known or even competing organizations as specific examples and then compare the visions developed by students with the actual vision statements of these organizations. Alternatively, instructors could provide students with a random assortment of CEO characters to work with (rather than ask them to develop their own character) to explore how this information impacts their discussions and the development of their vision statements.

Finally, the second exercise could also be converted to examine personal (vs organizational) vision statements, by modifying the three steps (awareness of the character, awareness of possible futures, choice of direction) to focus on asking students to develop their own desired end state and vision statement. This builds on previous work related to personal vision statement development (Quijada, 2017) and may be of particular interest to instructors and students in professional development and managerial skills courses.

Conclusion

We present a pair of exercises designed to provide students with a comprehensive understanding of organizational vision statements. Drawing on the characteristics of effective vision statements outlined in the leadership and strategic management literatures, students first reflect on the importance of visions, before working in small groups to create a compelling and effective organizational vision using foresight and futures literacy strategies. Overall, the experiences running the exercise and data collected from participants ($N = 87$) suggests that the activity is effective at helping students to develop a stronger understanding of the process and importance of developing an organizational vision statement.

Note

1. While it would not be possible to tackle all of these discussion questions within the estimated timing of the two plenary discussions (though the plenary could certainly be extended to cover the full list), we offer a large breadth of potential questions based on both character development and vision statements that instructors could select and adapt to align with the content and learning goals of their courses.

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- van Knippenberg, D. & Stam, D. (2014). Visionary leadership. In D.V. Day, (Ed.). *The Oxford Handbook of Leadership and Organizations* (pp. 241–259). New York, NY: Oxford University Press.
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Appendix 1. Vision statement reading list

Undergraduate student-specific readings

- Lucas, J. R. (1998). Anatomy of a vision statement. *Management Review*, 87, 22–27.
- Kirkpatrick, S. (2008). How to build a better vision statement. *Academic Leadership: The Online Journal*, 6, 5. <https://scholars.fhsu.edu/cgi/viewcontent.cgi?article=1231&context=alj>
- Kirkpatrick, S. A. (2016). *Build a better vision statement: Extending research with practical advice*. Lanham, MD, Maryland: Lexington Books.

Graduate Student-Specific readings

- Carton, A. M., & Lucas, B. J. (2018). How can leaders overcome the blurry vision bias? Identifying an antidote to the paradox of vision communication. *Academy of Management Journal*, 61:(6), 2106–2129.
- Kantabutra, S., & Avery, G. (2010). The power of vision: Statements that resonate. *Journal of Business Strategy*, 31(1), 37–45.
- van Knippenberg, D. & Stam, D. (2014). Visionary leadership. In D.V. Day, (Ed.). *The Oxford handbook of leadership and organizations* (pp. 241–259). New York, NY: Oxford University Press, 241–259.

Appendix 2. Structural and content characteristics of vision statements based on [Carton and Lucas \(2018\)](#) and [Kirkpatrick \(2016\)](#)

The literature suggests that vision statements should include several characteristics. While some characteristics are described as required (i.e. necessary for strong visions), others are optional.

Table A1.
Required
characteristics

The vision statement is . . .	Description
Specific*/clear ^a	Easy to interpret and understand
Future Focused ^a	Long-term in scope and describes the organization's desired end state
High in Imagery*/Abstractness ^a	Intangible and hypothetical. Describes an end state using words that one can easily construct a mental image of
Challenging ^a	Desirable and motivating for followers to attempt to achieve
Convincing in terms of its Core Values*/Idealistic ^a	Persuasive in terms of outlining the organization's core values and connecting followers around an idealistic common identity

Table A2.
Vision statements
would benefit from
these optional
characteristics

The vision statement is . . .	Description
Brief ^a	A succinct message that is easy for organizational members to remember (~35 words)
Unique ^a	Distinct in such a way as to be visibly unlike any other organization
Achievable*/has a definition of success ^a	Clear in its outline of an achievable standard of excellence to help followers measure their progress toward the desired end state

Notes: *Carton and Lucas (2018), ^aKirkpatrick (2016). In addition, to the aforementioned characteristics, Kirkpatrick (2016) argues that a leader's vision must include four essential features: the idea in the form of a statement, the future state to be achieved, a long-term future and the future state of the organization

Appendix 3. Exercise 1 – How would you evaluate these visions?

How would you evaluate the following vision statements from six large multinational organizations based on the required and optional characteristics outlined by Carton and Lucas (2018) and Kirkpatrick (2016)?

- “Our vision is a world in which all people's basic needs – such as shelter, clean water, sanitation, food and reliable power – are fulfilled in an environmentally sustainable way and by a company that improves the quality of the environment and the communities where we live and work.”
- “We aim to deliver top-tier financial performance over the long term by integrating sustainability into our business strategy, leaving a positive imprint on society and the environment. We call this performance with purpose.”
- “Our vision for the future is to be the customer's first and best choice in the products and services we provide. We will continue to be the leader in the insurance industry and we will become a leader in the financial services arena. Our customers' needs will determine our path. Our values will guide us.”
- “To be among the most successful, sustainable and responsible companies in the world.”
- “To be the world's most dynamic science company, creating sustainable solutions essential to a better, safer, healthier life for people everywhere.”

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- “The best-branded consumer products . . . in every home around the world.”

Use the following scoring key to assign a score to each vision statement. Tabulate scores for the required characteristics, optional characteristics and an overall total.

- 2 = Fully characteristic of the vision.
- 1 = Partially characteristic of the vision.
- 0 = Not at all characteristic of the vision.

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Table A3.
Vision statement
scorecard

Vision characteristic	Vision 1	Vision 2	Vision 3	Vision 4	Vision 5	Vision 6
Required characteristics (10 points)						
Specificity/clarity						
Future focus						
Imagery/abstractness						
Challenge						
Reflect core values/idealism						
<i>Required score</i>						
Optional characteristics (6 points)						
Brevity						
Uniqueness						
Achievable/success definition						
<i>Optional score</i>						
Total score (16 points):						

Appendix 4. Exercise 1 – Instructor notes: vision statement organizations and judges scores

Organizations and links to each vision statement:

- (1) Caterpillar:
 - Retrieved from www.caterpillar.com/en/company/sustainability/vision-mission-strategy.html
- (2) Pepsi-Cola:
 - Retrieved from www.pepsico.com/about/mission-and-vision
- (3) State Farm Insurance:
 - Retrieved from www.statefarm.com/about-us/company-overview/company-profile/mission
- (4) International Paper:
 - Retrieved from www.internationalpaper.com/company/about-international-paper
- (5) DuPont:
 - Retrieved from www2.dupont.com/Our_Company/en_ID/mission_vision_values/index.html
- (6) Whirlpool:
 - Retrieved from www.whirlpoolcorp.com/delivering-to-the-whirlpool-corporation-vision/

Table A4.
Summary table of the
judges scores –
means and standard
deviations

Vision characteristic	Caterpillar	Pepsi-Cola	State farm	International paper	DuPont	Whirlpool
<i>Required characteristics</i>						
Specificity/clarity	1.60 (0.51)	1.33 (0.72)	1.00 (0.76)	0.67 (0.72)	1.20 (0.78)	1.07 (0.96)
Future focus	1.73 (0.59)	1.60 (0.63)	1.60 (0.81)	1.00 (0.84)	1.27 (0.88)	0.93 (0.88)
Imagery/abstractness	1.47 (0.64)	1.07 (0.70)	0.87 (0.83)	0.80 (0.77)	1.27 (0.70)	0.87 (0.83)
Challenge	1.73 (0.59)	1.53 (0.64)	1.07 (0.80)	1.33 (0.72)	1.40 (0.63)	1.07 (0.88)
Core values/idealism	1.73 (0.59)	1.33 (0.72)	1.00 (0.76)	1.07 (0.59)	1.47 (0.74)	0.53 (0.64)
Score/10:	8.27 (2.22)	6.68 (2.45)	5.53 (2.61)	4.87 (2.83)	6.60 (2.87)	4.47 (3.71)
<i>Optional characteristics</i>						
Brevity	0.73 (0.70)	0.93 (0.89)	0.60 (0.74)	2.00 (0.00)	1.53 (0.52)	1.93 (0.26)
Uniqueness	0.93 (0.70)	0.87 (0.93)	0.73 (0.70)	0.40 (0.51)	0.80 (0.86)	0.47 (0.74)
Achievable/success def.	1.00 (0.76)	1.13 (0.74)	0.87 (0.83)	0.60 (0.74)	0.80 (0.67)	0.73 (0.70)
Score/6:	2.66 (1.54)	2.93 (1.71)	2.20 (1.69)	3.00 (0.84)	3.13 (1.30)	3.20 (1.15)
Total Score/16:	10.93 (3.31)	9.80 (3.77)	7.73 (4.17)	7.87 (3.38)	9.97 (3.84)	7.64 (4.43)

Note: N = 15 judges

Appendix 5. Exercise 2 – Character development, future thinking and organizational vision statement vignettes

In this exercise, we would like you to act as CEO and develop an inspirational vision statement for a hypothetical organization.

The following vignettes present an overview of two hypothetical organizations created for this exercise. Please select one and complete Steps 1 through 3 for that scenario.

Vignette 1

Company Name: Huber Elevators

Industry: Elevators, moving walkways and escalators.

Employees: 4,300

Operates in: 83 countries (headquartered in Vienna, Austria)

Company profile: Originally founded by Maximilian Huber in 1894, Huber Elevators is the largest manufacturer of elevators, moving walkways and escalators in Austria and eighth largest in the world. Over the past five years, you as CEO and member of the Huber family have pursued an aggressive global expansion policy, which has included the acquisition of several competitors in Southeast Asia and South Africa. As part of the process of integrating these firms into the organization, you have decided to develop a new vision statement that highlights the increasingly globalized nature of Huber Elevators.

Vignette 2

Company Name: Silky

Industry: Luxury Apparel

Employees: 25

Operates in: 3 countries (UK, Vietnam and Thailand)

Company profile: Founded three years ago, Silky has become one of the fastest-growing providers of sustainable silk products in the world. Originally founded to meet the needs of the largest luxury brands and the growing trend of sustainably sourced fabrics, Silky recently moved into the development of a line of luxury apparel and sleepwear that uses the same sustainably sourced silk fabric. Silky manages all aspects of their business from the sale and marketing of its products online, to the ownership of its factories where they enact fair compensation and ethical treatment policies and standards across the organization. In addition, a portion of all sales contributes to protecting

silkworm habitat around the world. To celebrate this transition from supplier to the global apparel brand, you as founder and CEO of the organization, have decided to update the organization's vision statement to reflect this new organizational direction.

Developing a vision statement for the organization

To help you develop a strongly aligned vision statement for the hypothetical organization that you selected, we present a three-step creative character development activity aimed at fleshing out the CEO of the organization, while giving you the leeway to add additional details, as needed, of the organization that you select.

Note that you can use anyone you wish for inspiration when developing your CEO. You can base it on yourself, a famous person or a composite of people – the decision is completely up to you. Regardless of your choice of CEO, we ask that you go through each step in this process prior to developing a vision statement for your organization.

Step 1 – Awareness of the character

Character: This dimension deals with who the character is, what they do and what makes them distinct.

- What are the core values of the CEO? Do the CEO's values align with those endorsed by the organization?
- How is the CEO perceived by others? How is the organization perceived?

Relationship: This dimension affects how the character behaves with others and their environment (e.g., competitive, supportive).

- How does the CEO treat key stakeholders (e.g., employees, shareholders)?
- What kind of internal conflict do you foresee the CEO experiencing as the organization moves closer to achieving the vision (e.g., work/family conflict, competitors)?

Objective: This dimension helps to define what the character actually wants.

- What key objectives or goals is the CEO trying to fulfill?
- What will achieving these key objectives and goals lead to for the CEO?

Where: This dimension describes the location or the environment in which the character operates.

- Do you see the CEO staying with the organization for the next year? five years?
- Who are the key competitors in the industry?
- What kinds of changes to the competitive landscape do you foresee during this time?

Step 2 – Awareness of possible futures for the organization

Now that you have thought more about the CEO and the organization, describe a number of desirable end states for the organization. Be sure to evaluate each end state on the following criteria:

- Is the desired future even possible?
- Is the desired future probably or likely to occur?
- Is the desired future truly the preferable option based what you know about the competitive landscape?

Step 3 – Choice of organizational direction

- Now that you have developed your character, select a desired end state for your organization. This could be written as a few sentences, a paragraph or using bullet points.
- Once you have done this, imagine that you can enter a time machine and are able to emerge in the future right after your company has achieved the desired end state, which you selected above. What does this future look like? Take a picture with your camera. Think of how to make your vision statement reflect what you saw in the picture you took.
- Using your knowledge of characteristics of effective visions, craft a brief, but impactful vision statement for your organization.

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