

Vision Planning Worksheet

This worksheet will help you to articulate your vision for your organization and to communicate this vision to all stakeholders (internally and externally) involved.

SECTION I: WRITE YOUR PERSONAL VISION

Write your vision. Describe a “picture” or a “photograph” of what a day a month or a year in the future looks like to you? What impact do you want to have? What are the key elements to this picture?

Describe the current day-to-day operations or what we are currently focused on.

How does your picture of the future and your current day-to-day align? How does it differ? What must you change to align today's reality with your future vision?

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SECTION II: VISION FOR YOUR COMPANY

Key questions to ask yourself in articulating your company's

- vision?**
- How will our initiatives/services impact (call-to-action) the community/world?
 - What do you want to achieve? Why does it matter?
 - Why would this matter to my employees? What's in it for them?
 - Why would this matter to our investors? What's in it for them?
 - Is the vision/impact larger than life, bold, audacious and borderline foolish?

Examples of Vision Statements:

- [Amazon](#) (online retail) – *"Our vision is to be earth's most customer-centric company where customers can find and discover anything they might want to buy online... at the lowest possible prices."*
 - [PepsiCo](#) (consumer products) – *"Our vision is put into action through programs and a focus on environmental stewardship, activities to benefit society, and a commitment to build shareholder value by making PepsiCo a truly sustainable company."*
 - [Amnesty International](#) (nonprofit) – *"Our vision is of a world in which every person – regardless of race, religion, ethnicity, sexual orientation, or gender identity – enjoys all of the human rights enshrined in the Universal Declaration of Human Rights and other internationally recognized human rights standards."*
 - [Ikea](#) (retail) – *"To create a better everyday life for the many people."*
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SECTION III: COMMUNICATING YOUR VISION TO YOUR TEAM

The **Where?** And the **How?**

Listed below are context examples for communicating your vision to your

team. • Weekly or Monthly Meetings

• Town Hall Meetings

• Quarterly Summits or Trainings

• Annual Conferences

• Company Retreats

Think about “How?” Each stakeholder will understand the company’s vision as it relates to their role/function in the company. The chart below will help you consider each team member’s role, potential fears, and key aspects of the vision that must resonate with those roles.

For Whom (Role)	Ideal Vision (As you understand it)	Fears of this Vision (What don't they understand?)	Key points of Vision (How to communicate to them?)