



THE
APPROACH

Mission and Vision Tools

This collectively emphasize the importance of strategic planning, stakeholder engagement, and execution in driving organizational success.



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Visioning Exercise



Part I: Bring Your Business Vision into Perspective

INSTRUCTIONS:

- Review your responses to your Business Visioning Exercise/s.
- Then, allow yourself 30 minutes of quiet time to consider these questions that help you bring your business vision into reality - and perspective.
- NOTE: Work through the questions in the order below and write your answers in the PRESENT tense.

1. In summary, where do you ultimately want your business to get to?

2. What would you include or additionally achieve, if there were no obstacles?

3. What do you want your business to be doing:

i) 10 years from now

ii) 5 years from now

iii) 2 years from now

iv) 1 year from now

v) 6 months from now

vi) 3 months from now

Part II - Bring Your Business Vision to the Present Day

INSTRUCTIONS:

- Allow yourself 30 minutes of quiet time to consider these questions that help you create and shape your vision for your next 3 months.
- Get SPECIFIC. Write down what you want each area to look like in 3 months' time, in the PRESENT tense.

1. How do you want your business to be in 3 months' time?

i) Personal Health: My Work-Life Balance

ii) Business Health: Finances - include Sales & Costs/Expenses

iii) Advertising, Marketing, Social Media, PR etc.

iv) Staff and Support Personnel

v) Joint Ventures, Affiliations etc.

vi) Training, Knowledge, Learning

vii) Technology, Website, Communications

viii) Write anything else that you perhaps haven't mentioned yet here

2. What if there were no obstacles?

3. What resources do I need to help me?

(equipment, people, personal qualities, processes, information/knowledge, skills, technology, support, finance etc.)

4. Who do I need to BE to achieve this?

5. If there was just one important CHANGE you could make over the next 3 months, what would it be?

6. My THEME for the next 3 months is: _____

7. Taking ACTION (make sure these things are achievable so you can easily take action and get this moving)

3 steps I will take within the next WEEK that move me closer to this vision:	1. 2. 3.
3 steps I can take in the next MONTH that move me closer to this vision :	1. by 2. by 3. by

Mission Statement Generator



Part I - Preparation and Questions

WHY HAVE A MISSION STATEMENT?

- Your mission statement is about you, your business and your ideals. A great mission statement will define a business and its purpose in under 30 seconds. It should include what you do, what you stand for and why you do it.
- Your mission statement is a set of carefully chosen words that clearly communicates the purpose of your business. It also helps define the metrics you use to determine organizational success, guide business decisions, inspire your management team, staff and shareholders - and ensures you are all 'on the same page'.

INSTRUCTIONS: First, answer the questions. Then, using your answers, the tips on the next page and the examples in the appendix, craft a mission statement for your business. NOTE: It's worthwhile spending time on crafting the words - but don't get drawn into creating the perfect mission statement. Capture the essence to get you going for now and you can always come back and update it later.

1. **PURPOSE:** Why are you in this business? Why do you do what you do?
2. **WHO:** Who do you serve? How do you want to treat your customers, your employees?
3. **WHAT:** What is your "big idea"? What do you stand for? What do you want to be known for?
4. **SPECIAL:** What's unique about your business? What key ingredient makes your business special for its customers? How do you stand out from your competitors? Why should someone buy from you?
5. **GOALS & MEASURES:** What are your goals in running this business? How will you know you have succeeded? What measures will you choose to measure your success?

Part 2 - Refining and Creating

Now it's time to work on the wording of your mission statement. Craft your words using the tips below, until you have a clear and concise mission statement that includes what you do, what you stand for and why you do it.

MISSION STATEMENT TIPS

- Ideally, **keep your mission statement to 3-4 sentences** so it is **clear, concise and memorable**.
See the big picture, don't limit yourself. Your mission statement should grow with you over time. An accounting business doesn't do finances, it frees up their clients' time, identifies growth opportunities and savings for its customers, it minimises taxes and maximises profits for its clients. A business building child car-seats doesn't manufacture car seats; it provides safe, comfortable transport for the most precious thing in parents' lives - their children.
- **Ask others for input.** Run your draft mission statement by people who know your business. Is it clear, easily understood? Or does it sound like meaningless corporate speak?
Make it personal and unique to you and your business.
It can be really helpful to include 'measures' in your mission statement eg. 95% of the time, using 75% local produce, but as you'll see in the appendix even the big companies don't always do this. Consider that you are creating a statement to guide you in running your business - and include measures as appropriate.

MY MISSION STATEMENT IS: _____

Use this space and the next page to DRAFT and CRAFT YOUR MISSION STATEMENT:

Use this space to DRAFT and CRAFT YOUR MISSION STATEMENT:

Appendix - Mission Statement Examples

Included in this Appendix are some mission statements to give you ideas. You may notice that even the Mission Statements of big companies are sometimes a bit lacking. Use these examples to create a clear, concise mission statement that not only tells what you do, but why and what you stand for!

DISCLAIMER: These mission statements were researched online and have been provided for ideas and inspiration only. We cannot guarantee their completeness or accuracy.

- **Advance Auto Parts:** to provide personal vehicle owners and enthusiasts with the vehicle related products and knowledge that fulfill their wants and needs at the right price. Our friendly, knowledgeable and professional staff will help inspire, educate and problem-solve for our customers.
- **Coastal Contacts:** to deliver you the highest quality eye care products at the guaranteed lowest prices anywhere on the globe. When you want fast, friendly service and great prices, we want you to think of Coastal Contacts.
- **Four Wings Farm shop:** educates our customers and supports our local farmers by selling the best, freshest seasonal produce from local farmers and market gardeners. Our produce is clearly labeled with product name, variety and farm name and offered at the lowest possible prices while ensuring farmers are well paid. Our customer service is world class - customers love to come into our store, our staff love working for us and we are constantly innovating and improving.
- **Harley-Davidson, Inc:** We fulfill dreams through the experience of motorcycling, by providing to motorcyclists and to the general public an expanding line of motorcycles and branded products and services in selected market segments.
- **IKON Office Solutions:** Helping our customers manage document workflow and increase efficiency through best-in-class products and services. Fostering the growth and development of our employees. Providing a distinct advantage to our suppliers as a distribution channel of choice. Growing shareholder value through strong execution of our strategies.
- **Lincoln Financial Group:** is committed to providing its customers with the life insurance, retirement and investment products and services they need to maintain their quality of life. As a concerned corporate citizen, the company's Foundation has sustained a strategic philanthropic program to improve the quality of life in the communities where our employees live and work.
- **Mystic Cafe:** is a family-friendly restaurant that focuses on quality, local, organic food in a fun and welcoming atmosphere. We want our staff to love working for us and our customers to tell their friends and come back regularly. We offer great salaries, benefits and training opportunities to our staff and have an open management style so we continuously learn, improve - and remain the number one cafe in the minds of our customers.
- **Nike:** To Bring Inspiration and innovation to every athlete in the world.
- **The Chubb Corporation:** We are dedicated to providing excellent underwriting and loss control advice up front, and to ensuring superior customer service through the life of the policy. Our knowledgeable loss prevention experts can help commercial customers reduce losses in the workplace. Our personal appraisers are invaluable in determining accurate replacement value, which is more likely to provide you with the right amount of coverage for your valuable property.
- **The McGraw-Hill Companies:** We are dedicated to creating a workplace that respects and values people from diverse backgrounds and enables all employees to do their best work. It is an inclusive environment where the unique combination of talents, experiences, and perspectives of each employee makes our business success possible. Respecting the individual means ensuring that the workplace is free of discrimination and harassment.

Business Vision into Action



Part I - “Rocking Chair” Vision Exercise

INSTRUCTIONS: This exercise helps you see the vision you *already have within you* for your business.

- What is the bigger vision you have for your business? What is the biggest vision you have for your business?
- Allow yourself 20 minutes of quiet time to ponder and write your answer in the space below!
- Let your imagination go, **write a story and paint a picture for your business with words.**
- Don't worry about beautiful writing, just write down what pops into your mind, what you see, hear and feel. A bullet point or numbered list, short or long rambling sentences - it doesn't matter. Just write it down.
- Finally, if you need more space, simply turn over or grab another piece of paper.

Take a moment to imagine that you're 90 years old and are **sitting in your rocking chair** and looking back over your **IDEAL life**. You are happy and healthy and your business succeeded beyond your wildest dreams. Then, simply answer the questions below.

1. What is it about you and your business that **people value**?
2. What has your business **achieved**? What are you **proud of**? How has your business added meaning to your life and given you a sense of **fulfillment**?
3. What **difference** has your business made in people's lives? In the local community? In the world?
4. What are the **best parts** of your business? What **shows you** that your business has been a **success**?
5. What is **great** about your life? How has your business **helped you achieve** your goals and dreams? What **can you see** around you? What are you **hearing**? What can you **feel**?

Final Tip: The complete picture may not magically arrive, just put pen to paper NOW and write – see what happens!

Part II - “Retirement Party” Visioning Exercise

BACKGROUND:

- This visioning exercise involves you imagining some point in the future, when you're going to retire or withdraw from running your very successful business.
- Are you handing on your business to a daughter/son? Or have you sold or closed down your business?
- However you got here, a big party is being held in your honour. This party is celebrating you, what you brought to your business and what your business has achieved.

So, take a moment to imagine that you're at a party celebrating you and your business! Someone has written a retirement speech celebrating you - what would it say? Use the question prompts below to help you, write the retirement speech that someone will read ABOUT you in the space below.

1. How old are you? Who is at the party? Where is the party being held?
2. What has your business achieved in the community or in the world?
3. What is it about you and your business that the **people at the party truly value**?
4. What would YOU want to be said about you? What would you be disappointed if it was not said?
5. What did you do that was truly amazing? Where did you surprise yourself? Where did you surprise others? What are you MOST proud of?
6. What mistakes did you make, that you can laugh about now?
7. What is the essence of your business you want communicated to whoever takes your business forwards?

Final Tip: Don't worry about writing a good speech - instead concentrate on what the speaker might say - if it helps, imagine this is a first draft of the speech, just to capture the key points:

Part III - "Newspaper Article" Writing Exercise

BACKGROUND:

- This visioning exercise involves you imagining you have achieved a great milestone in your business.
- This could be an award you have received (customer service, best ____ in _____, reader's choice) or it could be a financial goal, number of employees, locations, products or something else. What would success in your business look like for you?
- Now, write an article as if written by a newspaper about the recent milestone and successes you have achieved.

Tips

1. Write from 250-500 words in the PAST tense.
2. Mention yourself, employees and any sources quoted by name.
3. Include recent successes and other relevant business highlights.
4. What does your success MEAN for the people reading it - how do the readers benefit?
5. OPTIONAL: What newspaper would you like to be featured in? Try (as best you can) to write in that newspaper's style.

Final Tip: Don't worry about grammar or spelling - this is about capturing your vision and essence.

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