# Strategic Planning: Vision Setting Meeting

## Goal

Draft an organizational vision statement.

Works best with 6 or fewer participants.

## Duration

60+ minutes

## Agenda

### 1.0 Welcome (5 minutes)

Purpose of meeting, expectations, outcomes.

### 2.0 Understanding Vision Statements (15 minutes)

Discuss:

* + - What is a vision statement and why do we need one?
    - What are some good examples of vision statements?
    - What works? What doesn’t work?

### 3.0 Individual Brainstorming (5 minutes)

Silent brainstorming words or phrases that describe the future we want to create (think ten years out). Individuals write their ideas in a private document for the allotted time.

### 4.0 Review Vision Themes (10 minutes)

Individuals post/share their written ideas on a collaborative document. The team reviews the concepts together, identifying themes/commonalities, and clarifying meaning.

### 5.0 Prioritize Concepts (10 minutes)

Agree as a group on the most important concepts or themes that emerged from brainstorming. Which themes were most dominant? Which themes resonate? Decide on the handful of concepts that must be included in the final vision statement.

### 6.0 Draft Options

As a team, piece together the priority concepts/themes in a few draft vision statement options. Tweak and adjust the language until you have three good (if not perfect) options. Rank the options so that you have a first choice, second and third choice.

### 7.0 Review and Close

Agree on the process for finalizing the statement. I.e. one or two people should be responsible for finalizing and publishing the statement.

Note that the next step in the strategic planning process is to draft the mission statement, which will be a concise description of what we do, for whom, how. Note the prep work required of all participants for the next meeting.

## Resources

### Overview

Read about this meeting in The Complete Toolkit for Strategic Planning with Remote Teams

<http://www.lucidmeetings.com/templates/complete-toolkit-strategic-planning-remote-teams>

### How-To Guide and Template

Online meeting template with full 35-page Facilitator’s Guide *(Lucid Meetings account required)*

<https://meet.lucidmeetings.com/meeting_template/3118>