Six Great Visioning Tools:
What, When, Why, How ©

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Barbara is currently mentoring facilitators from all over the world and cares deeply about passing on the skills to others so the world becomes a just, peaceful and creative place.

Barbara’s strong interpersonal communication skills and experience allow her to work skillfully with a wide variety of participant perspectives.

Barbara specializes in helping groups participate, problem-solve, plan and make progress in challenging and complex situations. She is focused, respectful, compassionate and present as a facilitator, trainer and coach. Barbara has worked with hundreds of clients from all sectors with her own company since 1995. She provided social, economic and environmental consulting and facilitation services with many indigenous groups throughout Canada from 1981 to 1995.

Barbara is: Certified facilitator and USA trainer with the International Institute of Cultural Affairs (ICA Canada); Certified Professional Facilitator (CPF©) and assessor of other facilitators worldwide with the International Association of Facilitators (IAF); Professional Development Strategic Initiative Coordinator for the IAF for four years; was an Adjunct professor with University of Oregon and Portland State University (Not for Profit Management Institute); certified OneSmartWorld™ trainer; trained in Disaster Crisis Intervention for facilitators; certified accelerated learning trainer; trained extensively in: conflict resolution, Constructivist Listening and Cross Cultural Communication and Alliance Building, visioning processes, Mind Mapping™, Behavior styles model “Why Are You Like That?”™, and Herrmann Brain Dominance Instrument (HBDI). She is also trained in and teaches about learning organizations, organizational development mapping for organizations and strategic thinking for leaders.

Graphic design of this module by cherished and skilled facilitator colleague, Mari Mizobe Chu (www.marimchu.com)
Photography by Michael Chu (www.flickr.com/photos/mikechu) and Barbara MacKay
Introduction to
Visioning Tools

This learning module is one of over 45 individual self-directed learning modules available for purchase on our website, www.northstarfacilitators.com. It describes the what, when, why and how of visioning with teams, individuals, communities and organizations.

**Visioning** is a powerful tool for facilitators, team and community leaders, coaches and organizational development, life and business coaches and even mediators. We encourage you to adapt these tools and use your creativity in applying them. Email us if you have questions! Ideally we recommend you work with or observe someone who has done one for more of these processes so you know how it looks and sounds before you facilitate a visioning exercise for a group. We included two scripts you can practice so you sound really good 😊 when you do it the first time.

When done well, visioning is an inspiring, creative process that can help groups obtain amazing clarity. **When done well,** visioning is an **inspiring, creative process that can help groups obtain amazing clarity.**

When done well, visioning is an inspiring, creative process that can help groups obtain amazing clarity about what they would like to see happen in the future. Often groups are completely unaware that they have so much in common about what they want to see happening in the future. The skilled vision guide or facilitator helps them do this.

Visioning is often the starting point of a strategic planning process. It can also be used as a stand-alone or independent exercise to revive the hopes of a group or individual to give them renewed confidence in a more positive future.
What is a Practical Vision?

We use the term “practical vision”, borrowed from the Institute of Cultural Affairs (ICA)*, because it balances both the “reach for the sky” mentality and what is actually possible. We encourage you to let the group stretch themselves and be realistic at the same time. When the process is complete, the practical vision can be a statement or itemized chart of hopes and dreams. It gives a positive but realistic picture of the desired future. It answers the question: “Where do we want to be, or what do we want to see happening in the future?”

Typically we choose a 3- to 5-year timeframe for individuals and organizations creating a vision. When a group collaborates in creating a common shared vision and refers to it frequently after the process, they are more likely to reach their goals effortlessly. Practical visions are bold, attainable and concrete. A good vision makes one groan with delight and anticipation. It should have some elements of the wild within it – going beyond the tame and predictable. Visions are often latent (i.e., under the surface) or concealed beneath workplace complaints. It covers both real and felt needs.

Creating a practical vision takes visionary thinking.

We help a group access the dream state and with getting in touch with latent, often unconscious future hopes and dreams.

When you vision, you taste, smell, see, hear and feel a future state.

Visioning uses the right cerebral brain, visual/spatial, musical and intrapersonal intelligences.

Great music to use while doing visioning is “Navajo Flute” by Carlos Nakai.

*ICA is a global organization providing facilitation and training in facilitation skills. Here are two North American sites. Check your own country for a local office: www.ica-associates.ca or www.ica-usa.org.
Why Visioning Sometimes Does NOT Work

- Individuals/teams are not keeping the dream alive through all of their senses
- Old negative messages are obscuring the vision (e.g. “I don’t deserve this”; “we will get ‘clobbered’ if we try to do this”; “we don’t have the time or money to do this”; etc.)
- Limiting beliefs and attitudes (parental, societal, organizational)
- Undeveloped visioning skills
- Omitting critical first steps model (e.g. setting context and safety)
- Using left brain exclusively to generate ideas (i.e. coming up with a vision using only analytical modes); ignoring the importance of right brain and whole brain synergy and power
- Unwilling or unable to identify action steps after visioning so it can be implemented
- Not recognizing when outside support or help is needed to make the breakthrough needed

What is a visioning question?

At the beginning of the vision exercise, we give the group, team or individual a question on which to focus the mind.

One example of this question is:

“What do we/I really want to see, feel and hear happening in (our organization, community, life) in the next three to five years?”

How do we phrase visionary language?

We are looking for outcome language or something concrete and specific that a group hopes to experience in the future.

Once the group has undertaken a guided imaging exercise, have them state what they saw, heard or felt in nouns with several adjectives.

Two examples are:
- “A fully equipped, comfortable work space for all”
- “Bold, dynamic customer service”
Six Great Visioning Tools

Each tool is briefly described below. Each one is good. Choose the one that best fits your organization, and the resources and time you have to do visioning.

1. Guided visualization followed by facilitated idea sharing and recording

Use when you have only an hour or so to access the hopes and dreams of a group. Good for groups of any size. Start with soft instrumental music. Ask people to find a relaxing position, to either close their eyes or look at the floor. In a calm, steady voice direct them to relax and then look one by one at different components of your/their organization such as: the facility (space), the resources, the people, the mission, the atmosphere, the projects, levels of support, finances, etc. and imagine that everything is exactly as they would have it if things were going very well. (See appendix for an approximate “Identifying the Vision” script I use when guiding a group through an organizational vision exercise).

Take about 7-10 minutes to guide them through this process. Ask each person to open their eyes at the end and relaxedly write down anything they have seen, heard or felt in that process. Let them know some people do not see anything and that is fine. Just ask those individuals to focus on any answers they have to the question: “What do I want to see happening with my organization/team in the next 3-5 years?”

Give them 3-5 minutes to do this and then have them star their best 3-5 ideas. If the group is very large, break into groups of 4-6 people after the guided visualization. Have them share their starred ideas first in the smaller group for about 15-25 minutes. Ask them as a group to choose their top 3-5 ideas to share with the whole group. When all the ideas are written down (e.g. on a flipchart/whiteboard) for them to see, ask the group to pullout common themes.

“People need guiding stars to navigate and make decisions day to day.”
- Peter Senge
This is a very effective method for groups between 5 to the 100s and when you have 2 to 3 hours to process the data.

Small groups each generate several cards or post-it notes of ideas that capture their ideas for an ideal future. Encourage them to state very specific details like “everyone shares a potluck meal once a month”, versus general statements like “better workplace”.

These data sheets are clustered according to vision themes. Generally aim for 7-10 vision themes. You need to know how to work the data sheets – practice first or have an outside facilitator who knows the ICA ToP® Consensus method well. (See earlier footnote on ICA). See also the PDF e-learning module on Effective Consensus-Building Techniques for how to do this technique.

These are excellent visual processes for groups no larger than 30.

Draw and write down their ideas for the future on a large sheet of paper. This graphic depiction holds the group memory in colorful form, which can then be displayed in the group’s space as a vivid reminder of their vision.

You will need someone who is comfortable with graphic facilitation or mind mapping. You can purchase the PDF e-learning module called Mind Mapping – A Tool to Help You be Innovative and Creative Thinkers” for how to use this different graphic process.

Everyone finds magazine photos representing their ideas for any aspect of the organizational vision. Give each person at least 5 magazines with lots of photos. Ask them to find and cut out any pictures that appeal to them when they ask themselves, “What do I want to see and hear happening in our organization in the next five years?” After 20 to 30 minutes of gathering photos, have them then collectively glue them onto a large piece of paper. When done, the results are processed verbally with a series of questions. Get the group to suggest phrases to draw out the universal themes emerging from the collage.
5 Writing a story or song, and creating a symbol to represent the hopes and dreams of the group

This can be done on its own or is even better following one of the other techniques.

It cements the vision deeply into people’s hearts as there is more emotion poured into stories and songs. The symbols allow the group to have a visual anchor to their vision. Purchase the e-learning module called *Integrating Learning with Story, Song, Symbol* for a detailed description of how to do this.

6 Creating a vision statement from people’s individual ideas

This type of visioning is usually best done as a second step following one of the other tools.

It gives the group something very tangible to take to the public or rest of the “corporation”. You often see vision statements on websites. They can be very short or quite long.

**Examples include:**

From a University English Language teaching department:

“Our vision is to create an Enriching Learning Experience for Students, Staff, and Community”

From a community hospital:

“Our 5 year Vision through 2013, focusing on quality and patient safety, is to be a hospital that:

- Involves Patients and Families as integral parts of the healthcare team in its plan of care.
- Empowers Staff, Physicians and Volunteers to work together in a respectful, caring manner and enables them to do their jobs in a culture of pride and commitment.
- Works closely with its community partners in enhancing community options, which promote the provision of the right care in the right place at the right time.
- Meets and exceeds the expectations of our growing community of and beyond.
- Aggressively pursues the renewal of its infrastructure, thus leading to a safe, modern and technologically appropriate environment.
- Fosters a community whose members are proud of the services rendered and who become lifelong supports through involvement and philanthropy.
- Leads in Minimally Invasive Surgical technology.
- Leads in Research and Education among Community Hospitals.”
The Importance of Having a Personal Vision

Adapted From Hypno-therapist colleague, Janis Rosen, practising in Winnipeg, Manitoba, Canada

I added this section because having a personal vision or doing one regularly on your own will help you become a more powerful facilitator. We cannot state strongly enough that you need to have experienced visioning for yourself, before you do it for others.

My colleague Janis says: “We hear a lot about the power and value of setting goals. We experience the positive results of reaching our goals. Having a personal vision can make our goals more powerful. A vision is tied to our destiny to reach our highest potential and to live our highest truths and principles.”

A vision helps you to discover the life you really want to live. It helps you to live the life you truly love and value. When you have a vision to guide you, there is a destination and an overview. Picture yourself standing high on a hilltop. You can see the landscape of your vision, the shadows, the light, the colors, and the shapes. You can chart the course of your life holding that vision in your mind. You can set goals that help you define the steps to get you there. When you create a vision, you are tapping into the deep part of your psyche.

Remember: the vision is not optional. To be powerful, you must tap into people’s emotions and sense of possibility.
Appendix

Script: Identifying the Organizational Vision

*Used in almost all the six tools above.*

Use this approximate script to help groups or organizations tap into their subconscious vision. It is helpful to have quiet instrumental music in the background while reading this script. Use a gentle, positive voice. Pacing should be slow and allow for pauses for people to take their time at each part of the vision “journey”. Please adapt this script for your own cultural context to make it realistic and practical. See also pages 12-13 for a script you might use with an individual about her/his personal and professional vision.

1. Without thinking about it too much, what are some phrases you would use to describe your vision of a balanced, positive, sustainable and healthy work environment? If you were describing it to me, what would you tell me? For example, when members of a financial planning industry did this, they came up with phrases like: Expanding Decentralized Delivery; Holistic Synergistic Network; Comprehensive & Objective Financial Planning; and Innovative, Influential Leaders. Ask for a few ideas to warm up the groups’ thinking.

2. Find a comfortable spot to sit or even lie down where you can close your eyes or stare into space, looking down at the ground so to avoid being distracted by too much in your peripheral vision. We are going to undertake a short meditation/visualization or guided daydream to help you capture your ideal for a positive future organization.

3. If you are comfortable closing your eyes, do so. Become aware of your body in the chair or on the floor. Relax your facial muscles, your jaw, your shoulders and neck, your arms hang loosely, soften any muscles, legs and feet, relax, relax, relax. Take a deep breath in and out, and then a normal breath. Then, using another deep breath, breathe in and out, and repeat two times. Now you are quieter to begin to tap into the latent vision.
Imagine you are going on a journey to a beautiful spot. Somewhere where you feel very peaceful. It may be a quiet forest grove, or by a stream, or in a wonderful rose garden, or by the ocean with waves lapping at your feet, or in the mountains in an alpine meadow. It may be as simple as a comfortable sitting chair looking out into the city. Imagine that place of beauty and see yourself there quietly contemplating life and looking into the future. Think about the future of your organization for a moment, say, three to five years from now. You feel vibrant and alive and you really like what your organization is doing and saying.

Take a moment to think of your **office building and facilities**. What does your facility look like inside and outside? What sounds do you hear to make you feel relaxed and productive? What things do you have in your office building to make it feel like a special place to you and others? Capture any thoughts or images you have for the moment and move on to another aspect of your life.

Now you are looking at the **work your organization does**. What are you and others working at? What kind of things do you do in your jobs when you feel really good? What kinds of people are with the organization? What is your and others’ mood at your work when everything seems balanced? What is the mission of the organization? How do you know it by what you see and feel?

You are now in your **reputation and visibility in the community**. What do you hear from others about your organization when it is exactly as you dream it could be? What does it feel like? Who are your partners? Who supports your organization? What are your leaders like? What do they say and do that helps build an outstanding organizational reputation and culture? Mentally capture these thoughts and move on.

Now you are looking at the **organizational systems and finances**. What is going on there that is encouraging three to five years from now? What new systems are in place? How have you upgraded? What is working extremely well?

Capture these for a moment and prepare to come back to the present moment. Back to today and gently remind yourself of your surroundings. Feel your body in the chair and open your eyes on the count of three. One, two, three. Open your eyes.

When you are ready, take a blank piece of paper of any color and some felt pens, colored pencils or pencil and mind map what you captured either in thought or image. If nothing particular came to you during the visualization, spend some intrapersonal time now to jot down what you want to see happening in this organization to make it feel more balanced, healthy and purposeful. You will have about 5 to 10 minutes to do this. Your vision ideas should have some elements that are bold, exciting, attainable, concrete and specific.
Script: Identifying Your Personal Vision

Here is my script for doing a guided visioning exercise for an individual who wants to explore a future personal and professional life:

1. Without thinking about it too much, what are some phrases you would use to describe your vision of a balanced and healthy work and home environment? If you were describing it to me, what would you tell me? For example, when I did this, I came up with phrases like “gentle, graceful, joyous energy flowing within and without”, “celebrating and nurturing children, youth, women and parents”, “strong, glowing elegant appearance”, “loving mother and spouse who brings out the best in her family members and cultivates positive family dynamics”. Notice I used a lot of descriptive and compelling adjectives that really resonated with my sense of well-being.

2. Find a comfortable spot to sit or even lie down where you can close your eyes or stare into space, looking down at the ground so to avoid being distracted by too much in your peripheral vision. We are going to undertake a short meditation/visualization or guided daydream to help you capture what is your ideal for a positive future organization.

3. If you are comfortable closing your eyes, do so. Become aware of your body in the chair or on the floor. Relax your facial muscles, your jaw, your shoulders and neck, your arms hang loosely, soften any muscles, legs and feet, relax, relax, relax. Take a deep breath in and then a normal breath. Then, using another deep breath, breathe in, and repeat two times. Now you are quieter to begin to tap into your latent vision.

4. Imagine you are going on a journey to a beautiful spot. Somewhere where you feel very peaceful. It may be a quiet forest grove, or by a stream, or in a wonderful rose garden, or by the ocean with waves lapping at your feet, or in the mountains in an alpine meadow. It may be as simple as a comfortable sitting chair looking out into the city. Imagine that place of beauty and see yourself there quietly contemplating life and looking into the future. Think about your future for a moment, say, three to five years from now. You feel vibrant and alive and you really like what your life looks like.

5. Take a moment to think of your office. What are you working at? What kind of things do you do in your job when you feel this way? What kinds of people do you work with? What is your mood at your workspace when everything seems balanced? What does your office look like? What sounds do you hear to make you feel relaxed and productive? What things do you have in your office to make it feel like a special place to you? Capture any thoughts or images you have for the moment and move on to another aspect of your life.
6 Look at where you live. You are now in your **home**. What do you see when it is exactly as you dream it could be? What does it feel like? Who is sharing your home with you? Do you have pets? Music playing? Artwork? A garden? Capture these thoughts and move on.

7 Look at what else you are doing in your life – related to **community volunteerism or contribution**. Who do you do this with? What are you saying or doing which feels worthwhile/what positions do you hold in the community. How do you get supported in this community work?

8 Look at who you **keep company** with. Who are your friends and family who you stay connected with? What do they do? What kinds of people are they?

9 Look at how you **get to and from places**. Do you have a bicycle or special car? What does it look like – color, type, size, etc.? Do you use public transportation?

10 See yourself in your **spare time** when you are not working. What are you doing that thrills you and fills you with passion? What images come to mind? Are you traveling or playing an instrument? Doing weaving or pottery? Taking photographs or growing plants? Are you surrounded by friends and loving family? What do you see when your personal life feels full and rich and balance?

11 Now you see **yourself**. Observe yourself kindly and with compassion. You are doing very well. You are achieving what you want. What do you see when you are feeling vibrant and alive and full of passion and joy for life? What are you wearing? What does your face look like? Your eyes and hair? Your body? How do you keep healthy? How has your health and wellness improved? What do you do to keep healthy? What feels really good about your health situation in the future?

12 Think about both your work and home situation, your recreational time and your community volunteer time. Write down or sketch whatever comes to you. You will have about ten minutes to do this. Your vision should have some elements that are bold, exciting, attainable, concrete and specific.