



**Healthcare Rx – Part III**  
**Strategic Visioning: Applying the Zoom Lens**  
**By Marty Jacobs**  
**April 6, 2010**

Visioning is often compared to looking at an organization's future through a wide-angle lens. Organizations typically engage in a visioning process to create a picture of the future for the whole organization. Strategic visioning is when that same process is applied to a smaller part of the organization to help align that division or department with the overall vision of the organization. It follows the same steps as organizational visioning but assumes that there is already an organizational vision in place. Thus it seems more like focusing in with a zoom lens. Successful visioning, whether it's large-scale or focused, involves two key concepts: 1) the notion that the organization's vision is a shared vision and 2) the need to create commitment to rather than compliance with the vision.

**Shared Vision**

A shared vision emerges from the intersection of personal visions and helps create a sense of commitment to the long term. However, there is more to a shared vision than just this amalgamation of personal visions. Vision is only truly shared when people are committed to one another having it, not just each person individually having it. There needs to be a sense of connection and community with respect to the vision that provides the focus and energy for attaining that vision. It is the commitment to support each other in realizing the shared vision that gives the vision power. Furthermore, it supplies the guiding force that enables organizations to navigate difficult times and to keep the organization on course.

Shared vision cannot exist without personal vision. An organization must start the process of building a shared vision by encouraging others to create personal visions. Everyone must see a part of his or her personal vision in the shared vision. Shared vision takes time to emerge and requires on-going dialogue where advocacy is balanced with inquiry. By sharing and listening to each other's personal visions, new insights will surface that continually shape the shared vision. Building a shared vision is a perpetual process. There is a constant need to assess both the internal and external environment.

Just as personal vision reflects individual aspirations, a shared vision must reflect organizational aspirations as well as the individual visions that form its foundation. It is not the leader's individual vision that has been expressed, sold, and accepted. There is a crucial element of

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choice and ownership in a shared vision. Without that sense of commitment to the vision, an organization is left with compliance.

### **Commitment vs. Compliance**

It can often be difficult to distinguish between commitment and compliance. Compliance, at its best, is when someone believes in the leaders creating the vision and willingly follows the rules, working diligently to make that vision happen. At its worst, compliance creates employees who perform at the absolute minimum. Commitment, on the other hand, happens when employees take responsibility for achieving the vision and will change the rules if they become a barrier. In the world of transactional analysis, compliance would be described as a parent-child interaction where commitment would be described as an adult-adult interaction.

The differences between commitment and compliance can often be subtle, but the outcomes never are. True commitment to a vision creates a passion and energy unattainable through mere compliance. Committed people *want* the vision; compliant people *accept* the vision. Committed people *enroll* in the vision, an action that implies personal choice. Compliant people are *sold* a vision, an action that implies a form of coercion.

One of the biggest pitfalls in creating a shared vision is the belief that employees are committed when in fact they may only be compliant. How do you know? Start by asking how much you are trying to control the outcomes. Much like the difference between debate and dialogue, compliance relies on convincing someone of the rightness of a particular point of view, where commitment relies on a willingness to listen to all points of view as well as sharing your own. To create a shared vision, leaders must be willing to share their personal vision, accepting that it is not the shared vision, and ask others to share theirs. Finding the common ground in those collective visions is the beginning of a shared vision. If you find yourself doing more talking than listening, then you probably have compliance and not commitment.

### **Strategic Visioning**

Let's apply these concepts, shared vision and commitment, to a specific scenario:

Complaints about inappropriate language, dress and conversation involving staff nurses in several units in a community hospital have recently surfaced. In addition, there seems to be an issue of some staff aligning with others in a negative way against a manager who was out sick. Some of the complaints involve reports from patients and/or family members while others have come from nurses in staff and leadership positions. One staff RN requested some training on professional demeanor in hopes of addressing some inappropriate conversations between colleagues she overheard.\*

Although requesting training on professional demeanor is a well-intended response to the situation, it is not likely to produce any lasting changes without a sense of commitment from the staff. As Meg Wheatley so succinctly put it in *Leadership and the New Science*, "People support

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what they create.... It simply doesn't work to ask people to sign on when they haven't been involved in the planning process." So here are some steps that the staff can take to alleviate the situation:

1. Gather all the staff together and have them develop their personal visions. Here are some questions from the *Fifth Discipline Fieldbook* that can inspire their thinking:
  - What would you personally like to see your department become?
  - What contribution would it make?
  - What values would it embody?
  - How would people work together?
  - How would people handle good and bad times?
  - If your department were like this, what would it bring you?
2. Record personal visions, either on newsprint or sticky notes, so that everyone can begin to identify the common ground. That common ground is the shared vision.
3. Compare the common ground with the overall organizational vision. The emerging shared vision must be consistent with the organization's overall vision, core purpose, and values. Likewise, it must in some way reflect the individual visions upon which it was built. This is the crucial point of creating harmony and commitment.
4. Once a shared vision is developed, the staff can begin to develop action plans for attaining the vision. It is important to set success indicators or benchmarks that mark progress toward realizing the vision. Such intermediate goals will alleviate the difficulty some experience in holding the vision in face of current reality.
5. As action plans are implemented, the staff should periodically revisit the shared vision. A vision is akin to a living organism: it requires sustenance. Organizations need to continually reflect on it, test it, and reshape it. The vision will die without on-going dialogue.
6. The department needs to view itself as a community where people are bound by the promise of what they can contribute, not by what they can get. Therefore, it is imperative that staff holds themselves and each other accountable for attaining the vision.
7. Leaders within the department should begin to view themselves along the lines of the servant leader, as described by Robert Greenleaf in *Servant Leadership*. A servant leader is one who emphasizes service to others, a holistic approach to work, creating a sense of community, and shared decision-making.
8. Everyone in the department will need to develop patience, perspective, and perseverance as you embark on this journey. Developing shared vision is a change process, and like any change process, it will be harder to manage initially than it will be further in to the process.

The most important aspect of this process is keeping the staff focused on outcomes. When they are involved in the process of determining those outcomes and developing the action plans to achieve those outcomes, it is much more likely that they will feel a sense of commitment not only to the organization as a whole but also to the department and to the individual staff members within that department.

Next topic in the series: challenging assumptions.

*\*Thanks to Beth Boynton for developing this example.*

Resources:

*The Fifth Discipline: The Art and Practice of The Learning Organization*, Peter M. Senge, 1990.

*Organizational Culture and Leadership*, Edgar Schein, 2004.

Society for Organizational Learning (SoL) (<http://www.solonline.org/>).

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