

UNDERSTANDING THE ROLE OF VISION, MISSION, AND VALUES IN THE HPT MODEL

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Performance Improvement (PI) practitioners rely on the Human Performance Technology (HPT) model when diagnosing organizations and recommending interventions. However, the vision, mission, and values aspect of the HPT model is often overlooked or misunderstood. Research is summarized on the positive, significant impact of the vision statement on organizational performance, and characteristics of effective vision statements are reviewed. Results are also presented from a descriptive study of vision statement development, communication, and implementation. Implications for PI practitioners are provided for conducting organizational analyses as well as recommending effective vision statements and supporting vision statement development.

Performance improvement (PI) practitioners apply the Human Performance Technology (HPT) model (see Figure 1) when analyzing an organization, identifying performance gaps, and recommending interventions to address the gap (Van Tiem, Moseley, & Dessinger, 2012). However, the vision, mission, and values of the organization in relation to the HPT model are often overlooked or misunderstood.

A better understanding of the organization's vision is needed to conduct an accurate performance analysis as well as to identify solutions that will address the gap and will align with the organization's desired future. This article defines the concepts of vision, mission, and values, discusses the impact a vision statement can have when it reflects certain characteristics, and addresses the research on vision statement development and implementing the process. In addition, the article addresses implications for PI practitioners by providing specific actions they can take when working with organizations to diagnose and improve their performance.

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UNDERSTANDING THE ORGANIZATION'S VISION STATEMENT

Although considerable research demonstrates a vision statement's positive impact, little research has addressed how to develop an effective vision statement. As part of the process to help clients formulate a vision statement, I reviewed academic and practitioner literatures and found little empirical research to guide the development of an effective vision statement.

To address this research need, I conducted a descriptive study of 30 leaders in successful companies and interviewed CEOs, presidents, and founders (see Kirkpatrick, 2016, for complete details and results). Of the 30 leader interviews, 14 of the companies they led had been recognized on at least one best-places-to-work list (Best Small Places to Work 2014, Best Medium Places to Work 2014, Fortune 100 Best Companies to Work For® 2015). Other companies were identified through networking, and they served as a convenience sample of companies that were regarded by the referring individual as highly successful.

The sample of companies included large companies (e.g., Allen Edmonds, Sun Microsystems), medium-sized companies (e.g., Hagerty Insurance, Plante Moran), and small companies (e.g., ACF Solutions, Dahl Morrow

Performance Improvement/HPT Model

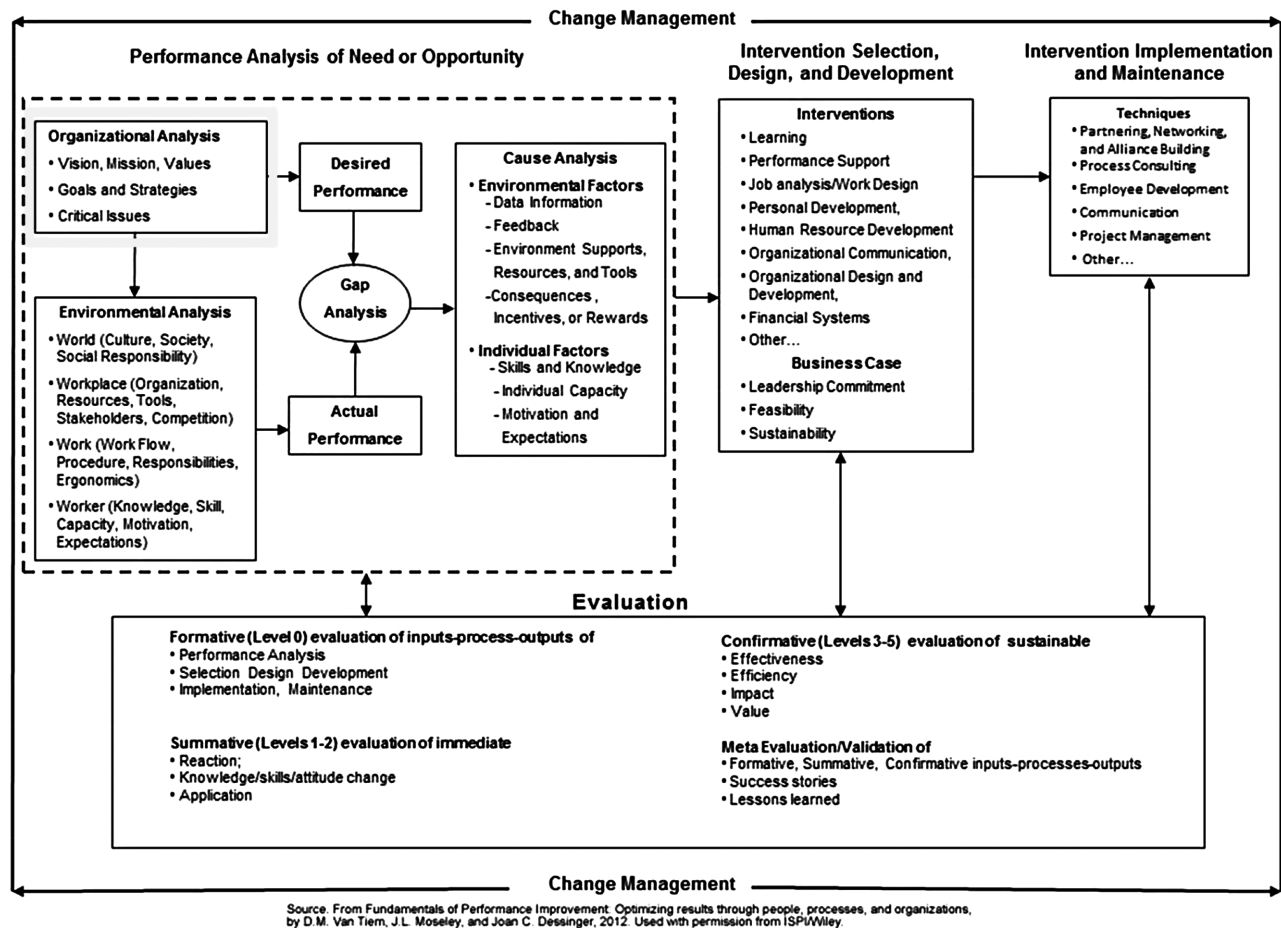


FIGURE 1. The Human Performance Technology Model (Van Tiem, Moseley, & Dessinger, 2012). Used with permission from ISPI Wiley.

International, ICATT Consulting, Ruby Receptionists, South Mountain Company, Talent Plus, Xactly). The sample also represented product companies (e.g., Allen Edmonds, Bubble Shack Hawaii, ThinkGeek) and services companies (e.g., Advantage Answering Plus, Contraqer, ICATT Consulting, Infusionsoft, Introhive, Resonate Insights, Stellar Solutions, Zenoss) as well as nonprofit organizations (e.g., Chesapeake Bay Organizational Development Network, City of Rancho Cordova, Community Memorial Hospital).

VISION AND RELATED CONCEPTS:

Definition and Impact

The vision statement and the mission and values statements are often confused with each other, partly due to a lack of standard, accepted definitions and partly due to the concepts being combined in different ways in practice. Some organizations combine the concepts of vision

and mission into a single statement, others combine vision and values, and still others combine all three into a single statement. For clarity, I define these concepts as follows:

- **Vision** is the positive impact that the organization wants to have; a vision statement is a formal description of the organization's desired, long-term future state.
- **Mission** is the organization's purpose; a mission statement defines the products or services provided to customers or constituents.
- **Values** are ideas that are important and that the organization seeks to retain; they define the means or behaviors by which the organization will go about attaining its vision.
- **Strategy** is how the organization will carry out the vision and mission.

Vision statements play a key role in driving change and performance in organizations.

The leaders I interviewed also expressed confusion over these concepts. Although I have defined them for clarity purposes, the leaders' advice was to not become concerned about the definitions. Larry Sternberg, president of Lincoln, Nebraska's TalentPlus, stated, "I choose not to get into semantic discussions about how they are defined." Similarly, Christopher Cabrera, founder and CEO of San Jose-based Xactly, advised,

Don't get caught up in other people's definitions of vision and mission statements. All that matters is what your employees think it is. If you and your employees can agree on what you think it is, you can work together toward the vision.

Although the leaders I interviewed used various terms to reflect their vision, mission, and values statements, for ease of communication in this article, I use the term *vision statement* to mean any statement that describes the long-term, ideal future as well as related elements such as mission or values.

Vision statements play a key role in driving change and performance in organizations (Kirkpatrick, 2004, 2009). A vision statement's impact on team, group, or unit performance has also been documented. Studies have identified a positive impact of vision statements on division and manager effectiveness (Barling, Weber, & Kelloway, 1996; Bass, Avolio, Jung, & Berson, 2003; Howell & Avolio, 1993; Howell & Higgins, 1990; Schaubroeck, Lam, & Cha, 2007). The role of the vision statement in facilitating organizational change has also been examined, with studies finding that companies whose vision statement focused on a desired future state were better prepared for change than those with a vision statement that did not focus on change (Coulson-Thomas, 1992; Larwood, Falbe, Kriger, & Meising, 1995; Roberts, 1985).

The impact of vision statements on individual outcomes has also been examined. Controlled laboratory simulations document the significant, positive effect of a leader who communicates a vision statement on individual performance (Howell & Frost, 1989; Kirkpatrick & Locke, 1996). Further, the vision statement has a positive impact on a range of employee attitudes, such as organizational commitment, job satisfaction, and task clarity (Griffin, Parker, & Mason, 2010; Kirkpatrick & Locke, 1996; Niehoff, Enz, & Grover, 1990).

Despite the evidence regarding the vision statement's impact, not every vision statement is equally effective. Several studies (Baum & Locke, 2004; Baum, Locke, & Kirkpatrick, 1998; Kirkpatrick, Wofford, & Baum, 2002) have found that vision statements that contained certain characteristics were linked to organizational performance. These characteristics are as follows:

- **Clarity:** the extent to which the vision statement is understood by employees
- **Future focus:** describing the desired future (not current) state
- **Abstractness and challenge:** providing a non-concrete, difficult yet achievable future
- **Idealism:** portraying a highly desirable future
- **Brevity:** providing a succinct, easy-to-remember statement
- **Uniqueness:** describing how the organization differentiates itself from other organizations, including its products and services, markets, strategy, or company history
- **Success definition:** stating how the company measures its progress in achieving the desirable future

Although research has not yet been able to specify the exact combination of characteristics needed for effectiveness, it suggests that clarity, future focus, abstractness and challenge, and idealism are more essential than the other characteristics. Clarity is essential because employees must be able to understand the vision statement in order to align their actions with it. Future focus, abstractness/challenge, and idealism are all elements of the definition of a vision statement and therefore are necessary characteristics.

Implications for PI Practitioners: Begin with Organizational Analysis

Given the research support for a vision statement's impact, when conducting an organizational analysis, PI practitioners should first determine whether the organization has a formally stated vision.

Next, PI practitioners should review the vision statement to determine which characteristics are reflected in the vision statement. PI practitioners should focus on the extent to which the statement is clear, focused on the future, abstract and challenging, and idealistic. Because the vision statement must be clear and inspirational to employees but not necessarily to practitioners, PI practitioners should obtain input from employees about their perceptions of the vision statement. Employee feedback could be collected through a formal survey, focus groups,

From the interviews of 30 leaders, I identified five stages that comprise a vision statement development cycle.

or individual interviews to confirm employees' awareness and understanding of the vision statement as well as the degree to which they find it relevant and motivational.

VISION STATEMENT DEVELOPMENT

Despite considerable research on a vision statement's impact, we know less about how and when to create one, which was my reason for conducting a descriptive study of vision statement development. From the interviews of 30 leaders, I identified five stages that comprise a vision statement development cycle (see Figure 2).

Stage 1: The Uncommunicated Vision

At Stage 1, the leader found inspiration for forming a company and had an ideal future in mind without formally stating that future. Without an initial inspiration for forming a company, the leader would not have been able to formulate and communicate a formal vision statement.

One source of inspiration is problems experienced in daily life. Dwight Gibbs was a drummer in a rock band who was in charge of ordering all equipment and supplies, such as speaker cables, drumsticks, and tee shirts. Requesting and organizing quotes in spreadsheets was unnecessarily time consuming. Later in his career, he served as CTO for several companies, including co-founding The Motley Fool, and experienced the same frustrations. Gibbs states,

In my role as CTO, I would get requests for laptops, servers, storage, software, and other equipment we needed to buy. The requests for the stuff people needed were constantly coming across my desk. I was dealing with RFQs [requests for quote] again! This time, when quotes came back, they could be 500 lines long or more. I had to put all this information into Excel to compare the quotes. All I could think was—it should not be this hard!

Gibbs founded Contraquer, a procurement software firm, for which he later (at stage 3) created a brief, memorable formal vision statement titled *Friction Free Procurement*.

Another common source of inspiration was finding unexpected initial success in business. Some leaders pursued their passion without initially giving much thought to turning it into a business. However, their friends and colleagues observed their success as well as their passion and prompted the leaders to reassess their aspirations and see potential in their businesses. Clate Mask, co-founder and CEO of the software firm Infusionsoft, didn't initially realize his company's full potential. He stated,

When we started, we had no intention of building a big business that would need a vision statement. We thought it would be a small company that we would sell after a few years. We went through three years of brutal survival, and then some modest success for a few years. At that point, we started to see that we were onto something really big.

A practitioner prompted Mask and his co-founders to change their thinking when the practitioner asked why they weren't "going for it" to grow the company. That challenge helped them decide that they wanted to build a company that was "big and impactful."

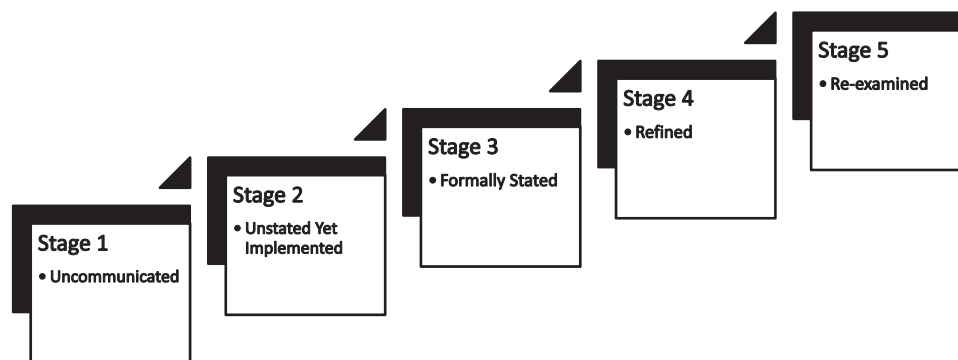


FIGURE 2. Five Stages of Vision Statement Development

Some leaders drew on their early career experiences and used their company to find better ways to do things. Celeste Ford worked in engineering firms before striking out on her own to found Stellar Solutions. For Ford,

The vision statement was a natural evolution of being in the industry for many years and seeing what worked and didn't work. Ford's vision remains untouched 20 years later—"To satisfy our customers' critical needs while realizing our dream jobs."

Clearly, one lesson that Ford applied to Stellar Solutions was a dual focus on both customers and employees. Ford "wanted to build a built-to-last, not a built-to-flip or sell, company."

Stage 2: Unstated yet Implemented

At stage 2, the leader had implemented an unstated vision. The leaders I interviewed who experienced this stage did not formally state their vision for several reasons: they had not found the right words, were too busy running the company, or did not initially see the importance of stating a formal vision.

Andy Hunn, CEO and founder of Resonate Insights, held several positions at fast-growing start-up companies throughout his career. Those companies grew so fast that, according to Hunn, they didn't have time to create a formal vision statement. At Resonate Insights, he said, "We've never really been smart enough to come up with one. The best thing we can do is to make the vision a living thing with the company by continually reinforcing it verbally and through behavior."

Other leaders indicated that they felt they couldn't initially live up to the idealism that would have been reflected in a vision statement. Scott McNealy, former Chairman, CEO, and founder of Sun Microsystems, explained why he felt that stating a vision during the company's early days would have been hypocritical: "Most leaders use the vision statement to sound and look good, but if it doesn't reflect what's going on in the company, then it's worthless."

McNealy wanted to evolve the culture to the point that it reflected his vision; only then did he think there was enough alignment for him to communicate a formal vision statement. He developed a formal vision statement many years after founding the company, which was "to eliminate the digital divide while doing no harm to the planet."

Despite the lack of a formally stated vision, these leaders found ways to implement their vision in a variety of ways. They set goals aligned with the unstated vision and reinforced those goals through slogans, mantras, and symbols. The leaders felt their energy and focus were contagious and helped motivate their employees. They obtained

a shared sense of clarity with them through continual discussion focused on the desired future. Andy Hunn explained how he ensured that employees were clear on his informal vision when he was at internet company Digex:

It worked because we spend a tremendous amount of time playing the role of connector. The role had nothing to do with our formal responsibilities in the company, but we spent time with employees who were executing on day-to-day work and were talking to them about strategic opportunities in the market. This kept everyone going in the same direction.

Another key to success at this stage was that the leader and co-founders shared and agreed on the vision. One way they were able to do this was through constant communication. Jody Glidden, founder and CEO of Introhive, stated that he and his co-founder had "pretty passionate discussions" about what the company should be. They had founded a previous company together and therefore felt that they were on the same page without having to formalize their vision.

Leaders with fewer than 30 employees indicated that it was possible to have frequent, one-on-one conversations with co-founders and employees to ensure common understanding and implementation of the vision. Leaders of companies that grew beyond the size of 30 employees and who waited to write a vision statement reported that they wished they had written a vision statement sooner. For example, Kristin Sharpe of ACF Solutions stated,

We didn't have it formally written down until a couple of years ago. That's unfortunate, but that's the truth. When we did the mission, vision, and core values, we were at a time of growth and change, which is not easy.

It is painful and hard at times to bring about change. It's very personal. I wish that we had more formally written down the vision statement early on. We said that because we're small, we don't need to write it down. I didn't realize how important it was until I sat down to do it. It was good that we did it then. It was good to get it down and was more challenging than I expected.

So, although it was possible to experience considerable success, imparting the vision using a one-on-one approach was a time-consuming, labor-intensive process for the leader. That process became nearly impossible as the company grew beyond 30 employees; leaders in this situation went on to stage 3.

Stage 3: Formally Stated

Almost all of the leaders progressed to stage 3 by developing a formal vision statement. Some leaders developed the vision statement alone, while others involved a combination of co-founders, top management team, employees, customers, and other stakeholders.

How the leader went about writing the statement depended on the size of the company. In small companies that typically had 30 employees or fewer, some leaders felt that they bore sole responsibility for writing the statement. Ashley Harding, founder of Bubble Shack Hawaii, a manufacturer and wholesaler of natural bath and body products, stated: “The responsibility for writing the statement falls squarely on the entrepreneur’s shoulders.”

Other leaders involved all employees in reviewing the vision statement. John Abrams of South Mountain Company indicated: “We had a draft statement that we reviewed in a series of open meetings” with employees.

In contrast, larger companies that typically had more than 30 employees included both executives and employees representing specific groups and units. Larry Sternberg of Talent Plus described a facilitation process for a vision statement development workshop that he had used with several organizations. The process consisted of forming a planning group that represented executive and lower levels in a company, asking thought provoking questions to generate debate about the vision and articulating draft vision statements that were then shared with others to obtain feedback before the statement was finalized.

Kathryn McCarthy of ThinkGeek recommended using an outside facilitator to guide a larger team through the vision statement development process. McCarthy explained, “Everyone in a company has their own strong, passionate views. Having some help to pull all those views together is helpful.”

Stage 4: Refined

At stage 4, leaders sought feedback on the draft vision statement in an attempt to find the right words to express their vision. They used the feedback to create the final version of the vision statement.

Gabe Hamda, founder and president of ICATT Consulting, a small human performance consulting company in Jacksonville, Florida, had been trying to find the right way to express his vision for his company. He was meeting with a client when he said, “We improve your people.”

Hamda suddenly realized he might be insulting the client by implying that her employees were not up to par, so he asked her if that was the case. Before the client could answer, one of ICATT’s interns whom Hamda had brought to the meeting responded, “Let’s say that ‘your people are

great and we make them better.” That statement became ICATT Consulting’s formal vision statement.

Similarly, Bill Karpovich, co-founder and former CEO of IT consulting firm Zenoss, described how the company’s original vision statement, *Changing the game in systems management* was refined to reflect terminology that more clearly conveyed his intent as well as wording that was commonly used in the technology industry. The final statement became *transforming IT operations*.

Stage 5: Re-Examined

At Stage 5, leaders periodically re-examined and, if necessary, revised the formal vision statement. Leaders intentionally reviewed the vision statement from time to time, such as quarterly or annually, to ensure that it continued to reflect the current state and was clear to employees. The vision statement was revised only if the company had evolved, employees were unclear what the original statement meant, or the market had changed.

Jill Nelson, founder and CEO of Portland, Oregon’s Ruby Receptionists, explains: “The essence of our statements has never changed, but the wording has changed a few times.” To Nelson, perfecting the wording is a never-ending process. She revisits the company vision statement at an annual leadership retreat. Ruby Receptionists’ vision statement is *We want to be the business-hold name [similar to being a house-hold name] known for exceptional customer service and making personal connections*.

Leadership and employees at Allen Edmonds, founded in 1922, had seen the market change many times. CEO Paul Grangaard took over in 2008 when the company’s market share was declining and debt was increasing. Grangaard updated the company’s vision to clarify its new direction of expanding beyond men’s shoes to men’s apparel. He explained, “Our vision was to regain our position as a great American shoe company, and now it is to become an American lifestyle brand from head to toe.”

Kathryn McCarthy, now former Chairman and CEO of Geek.net and ThinkGeek, also evolved the vision statement as the company’s offerings changed. Founded in 1999, ThinkGeek’s original business consisted of several websites as well as the ThinkGeek e-commerce site. The two lines of business had similar customers but were different enough that the decision was made to focus on the e-commerce side. The tag line *Stuff for Smart Masses* doubled as the initial vision statement in the early days. Once the decision was made to focus on the ThinkGeek site, a more formal vision was created, which was, *To create a world where everyone can embrace their inner geek, express their passions and connect with one another*.

The vision statement helped the company focus on a broader definition of what a *geek* is, according to McCarthy. It reinforced the idea that the client base included *uber geeks* that made up the original client base as well as “moms who want to buy gifts for people in their lives,” she stated. This led to adding more products geared toward women and other demographic groups that were different from the company’s original focus.

Implications for PI Practitioners: Tailor Vision Statement Development to the Client

PI practitioners should tailor their recommendations to the client’s vision statement development stage. Clients at stages 1 or 2, who have an unstated vision, should be advised to formalize their vision as soon as possible and to implement (or continue to implement) the vision.

To write the vision statement (stage 3), leaders of small companies should consider writing the initial statement themselves or with other leaders (such as co-founders or other top executives). Leaders of larger companies should involve as many employees as possible, including the top management team, along with employees who represent groups and levels across the organization. By seeking input on the draft statement as well as feedback and input on additional concepts or wording that could be included, a final vision statement can be developed (stage 4).

Clients with a formal vision statement that is understood and that employees find motivational should be encouraged to revisit their vision statement at least annually (stage 5), revising it if needed.

COMMUNICATE THE VISION STATEMENT

All of the leaders I interviewed agreed on the importance of communicating the vision statement repeatedly to employees so that all elements of the company were aligned with the vision. Communicating the vision statement entailed much more than sending a single email or printing posters with the statement. The leaders communicated their vision in many different ways and integrated its communication into their daily conversations.

Founder and CEO of recruiting firm Dahl-Morrow International, Andy Steinem, emphasized: “We have a lot of communication; we have weekly meetings where we talk about our goals for the week as well as our challenges and what we are doing in a changing market or landscape.” Another leader, Larry Sternberg, president of Talent Plus, suggests keeping the vision, along with mission and values, alive with a 10-minute daily stand-up meeting with employees, where each element of these statements is reviewed each day.

Communicating the vision went beyond simply repeating the statement word for word. Leaders tailored their explanations of the vision statement to get the message across. Ashley Harding, founder of Bubble Shack Hawaii stated, “We have to deliver the same message in a different way to different employees, whether they are putting labels on bottles or are sales executives.”

Implications for PI Practitioners: Coach Leaders to Integrate Communication into Daily Behaviors

Obvious communication methods, such as posters, email messages, or internal websites can be used to reinforce the vision statement, but they should not be the sole means for communicating it. The communication of organizational outcomes, such as quarterly financial performance or winning a new contract, should reference the vision statement and explain how the outcome aligns with and represents the intended vision.

PI practitioners should coach leaders, including senior management as well as managers and influential employees throughout the organization, to communicate daily actions and decisions as they related to the vision statement. PI practitioners should look beyond typical communication programs, which can easily and quickly become misaligned with the vision statement, and should attempt to reinforce the integration of the vision statement into all communications.

IMPLEMENT THROUGH ALIGNMENT

Regardless of which vision statement development stage a company was in, the leaders emphasized the importance of putting the vision into practice by aligning the organization’s strategy and goals as well as the talent management system, culture, and structure with the vision statement.

The leaders described how their strategy, along with short-term and long-term goals, aligned with and supported the vision statement. As goals were met, leaders rewarded their accomplishment and reminded employees how their achievement furthered the vision. After their success was celebrated, new goals were set, which leaders communicated in the context of the vision statement. For example, Marty Imes, Director of Vision and Culture at Advantage Answering Plus, holds celebrations when the company meets its quarterly goals; each quarter, a different theme is set, such as “spreading goodwill.” Progress toward this theme was tracked by employees, who reported compliments from customers using an online tool. The number of compliments far exceeded expectations.

Employees started to post the compliments on the office wall, and after several weeks, the walls were filled with compliments, providing a great visual representation of goal realization.

Leaders also aligned the talent management system, hiring, onboarding, selection, performance management, and separation with the vision statement. For example, Jill Nelson, CEO and founder of Ruby Receptionists, changed how her company advertised when recruiting new employees. Originally, job announcements focused on an applicant's years of experience, which did not yield the types of applicants Nelson wanted. In line with Ruby Receptionists' vision of *preserving and perpetuating real, meaningful relationships*, the new announcement read, "if you delight in helping others, we want to hear from you!"

The vision statement, often along with values, was also emphasized when employees were onboarded into the organization as well as used to provide performance feedback. New employees were given copies of the vision statement, and leaders met with new employees to share the company's history as well as the bigger picture of where the company was headed. Leaders and others in the organization provided feedback as it related to the vision statement. Jill Nelson of Ruby Receptionists describes the importance of the company's values that complement the vision statement: "We try to use them positively and proactively; we don't use the values to tell someone they are doing something wrong."

The leaders also described how their organization's culture aligned with the vision statement. Culture, defined as expected norms and behaviors, is determined by the vision statement as well as by values statements. Incentive management company Xactly relies on its vision and values statements to define expected norms. Community Memorial Hospital in rural Hicksville, Ohio, defines its values with behavioral statements that describe specifically what employees are expected to do, such as *We will make eye contact and acknowledge each person we pass in the hall, even if it is the 10th time today.*

Finally, the organization's structure must align with its vision statement. For example, ACF Solutions, a company that provides sales-force implementations, has two product lines, each of which is reflected in its vision statement of *ACF Solutions teams with non-profit and higher education organizations to implement cloud-based, enterprise solutions to achieve their missions.* Similarly, ThinkGeek originally consisted of two distinct businesses, an e-commerce website and media properties. Today, the company focuses solely on its e-commerce website, which is reinforced in its vision statement of *creating a world where everyone can embrace their inner geek, express their inner passions, and connect with one another.*

Implications for PI Practitioners: Recommend Interventions That Align with the Vision Statement

When conducting an organizational analysis, PI practitioners should examine the organization's internal environment to determine the extent to which it supports the vision statement. Only interventions that align with the vision statement should be recommended for implementation or continuation. This advice is counter to typical recommendations, which often focus on ensuring that organizations follow best practices. The leaders I interviewed did not always follow typical best practices; instead, they chose the interventions that aligned with their vision statement, regardless of whether their intervention was considered to be a best practice.

PI practitioners should evaluate the effectiveness of prescribed interventions, using the vision statement as a gauge or yardstick. Care should be taken to develop metrics that reflect the vision statement as opposed to metrics that are easy or convenient to measure.

CONCLUSION

As the process of creating, communicating, and aligning a vision statement is not always easy to do, it does not require expensive investment. It does, however, require focus, effort, and energy. Leaders who are passionate about their companies should, no doubt, be able to harness their own inspiration and share it with the rest of the company.

PI practitioners have an active role in coaching leaders, including senior management, lower-level managers, and influential employees throughout the organization to communicate daily actions and decisions as they relate to the vision statement. PI practitioners should look beyond typical communication programs, which can easily and quickly become misaligned with the vision statement and should attempt to reinforce integrating the vision statement into all communications while tailoring their recommendations to the client's vision statement.

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