

# S T A G E N

## PROFESSIONAL ONE-YEAR VISION WORKSHEET

In this worksheet, you will complete three stages of writing: Part I *Brainstorming*, Part II *Tell The Story of Your Vision*, Part III *First Draft Vision Statement*, and Part IV *Second Draft Vision Statement*.

Reflect on these questions and write down your answers in the space provided. We recommend that you block 30 minutes for each section and block time with some space between each block. This worksheet is meant to be a guide. We encourage you to work according to your preferred timing and employ any creative techniques that would be helpful.

For further clarification or inspiration on the deep significance of *vision* as it relates to leadership, refer to your Stagen Meaning Module.

### PART I: BRAINSTORMING QUESTIONS

1. What are the major professional (business, organizational, career) goals or objectives you intend to achieve during the next year?

- a) Increase gross profit, decrease expenses
- b) Take steps towards paperless dealership (sales + service)
- c) Improve employee retention
- d) Create foster service customer visits
- e) Become a President's Award dealership
- f) Fix customer vehicles right the first time
- g) Continue to give back to community

2. Review the list of goals and objectives from number one and determine whether all the essential dimensions (tangible and intangible) are represented; financial performance, systems, infrastructure, technology, individual and team performance, accountability, capability enhancement, morale, culture, and so on. List any additional goals and/or objectives needed to ensure that all necessary dimensions have been addressed.

- a) Team members need to be held accountable for their actions and non-actions.
- b) Culture needs to shift to point where all team members agree to do whatever is asked of them. Not just what they were hired for.



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3. What primary overarching strategies, approaches, or themes do you intend to use during the next year to achieve success (as defined by your above goals and objectives)? Feel free to list three or four overarching themes, but avoid restating specific goals.

- a) Consistency
- b) Persistency
- c) Honesty
- d) Integrity
- e) Team

4. Considering all of your previous answers, what three to five key elements will ultimately determine success for your organization during the next year? Put another way, how will you know that the year was successful?

- a) Increase in Net Profit
- b) Decrease in Employee turnover
- c) Increase in Customer Satisfaction Scores

5. Considering all of the above, in summation, what do you envision you will have achieved professionally (ideally), at the end of the next year?

A much smoother running Toyota dealership that is increasing performance year-over-year and has happier, more committed employees and loyal customers,



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## PART II: TELL THE STORY OF YOUR VISION

In this step, take your answers to the questions in Part I and aggregate them into a coherent overall description of your one-year vision. Pull the key concepts together into a coherent description of how you see your success one year out. Remember that effective vision descriptions are like telling a story (about the future) or painting a picture (with words).

In the future, Passport will be navigating the challenges of an ever-changing auto industry while increasing profits, performance, commitment to technology, customer experience, and creating a world-class environment for both employees and customers to enjoy.

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## PART III: FIRST DRAFT OF VISION STATEMENT (LONGER VERSION)

Next, edit your description into a well-crafted vision statement. This is an opportunity to fine-tune the language you originally used into descriptions that are more clear and compelling. Experience shows, each time a leader rewrites or edits a vision statement, it gets better. So take the time to do the multiple versions this worksheet recommends. You may want to allow a day or more between revisions to give yourself time to reflect on the concepts contained within.

~~Passport aims to create a world class environment for both employees and customers centered on commitment to customer service, technology~~

Passport aims to create a world class environment for both employees and customers centered on commitment to excellence in customer service, advancement of technology, growth, performance, and community.



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## PART IV: SECOND DRAFT OF VISION STATEMENT (CONCISE VERSION)

Finally, revise your vision statement once more to make it even more concise. Many of the best vision statements have only three to five sentences (short paragraph), yet contain the essence of the vision conveyed in the long-form vision descriptions.

Passport aims to create a world-class environment for both employees and customers focused on excellence in customer service, commitment to technology, growth, individual performance and community.