# PROFESSIONAL ONE-YEAR VISION WORKSHEET

Use this worksheet as you brainstorm, develop, and refine your Professional One-Year Vision Statement. This worksheet is meant to be a guide, so feel free to employ whatever brainstorming/visioning process you find useful.

## PART I: BRAINSTORMING QUESTIONS

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

#1: Completing the journey with Mindy and bringing a person in to replace her role (MRB) and moves into full-time purchasing plus has 10 critical clients. Interview and hire a really good person. Have a person (Dave) we’re interviewing – talented person.

Will pull work off me, commodities will be more even. Customers served better.

Rebuild/reform the team – ultimate goal is to have a team with high trust and speak honestly and freely.

1. Review the above-listed goals and objectives 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.

* intagible: I have to make the effort, take the time to sit down with each individual and get to “what do you need?” (spiritual, connection w/Todd, software)
* identify training needs
* meet as a group and review higher level material (leadership) that enhances conversation (e.g. Brené Brown)

1. What primary overarching strategies, approaches, or themes do you intend to employ 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 try to stay high-level and avoid re-stating specific goals.

Strategy:

* Set aside for me to plan what subjects I want to take my team through and why. E.g. Watch Pastor’s Leadership Pods as a group – have a discussion about take-aways
* Be specific –
* How do I get those folks who are having difficulty with transition to Malibu
* What is our new normal – Malibu normal (hard charging, driven, high energy, focused)
* What will it take for each of us on our team to step up our engagement/our work?

1. 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?

* Accomplished goal of moving up two people in organization (Mindy & Dave)
* I’ve done a really great job of articulating and communicating the Why and the What
* Creating an environment for freedom of expression, where folks are relaxed & confidence because they’ve found and reconnected with truth in self

1. Considering all of the above, in summation, what do you envision you will have achieved professionally – (ideally), at the end of the next year? Put another way, assuming you accomplish all of your crucial one-year objectives, what will that look like?

I would have four trained buyers on my team. We would have moved out of the fear mode with the acquisition of Cobalt by Malibu. All members of the team would clearly know what is expected of them. They would know that the rules of engagement have changed that we are held to new standards which has become the new normal. We will be a high performance team.

## PART II: AGGREGATING KEY IDEAS INTO A COHERENT DESCRIPTION OR “STORY”

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).

I would like the team to know that the vision is not just about numbers. It is about how we interact with each other. The vision would be a group of people working for one goal and that our department would be a place where everyone would say I want to be part of that group.

## 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.)

## 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.

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