# 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?

* Lew and I partner
* Acquisition of other DC/NPs
* Increase Ancillaries (PT,MRI,POD,Pharmacy,Lab, ect)

Start looking at land, ambulatory service centers and hospital affiliations are start-ups

* Grow business through ancillaries to fund growth/ personal investment
* Increase our footprint
* Increase employee base in each silo of org.
* Grow brand
* Premier one-stop shop for sports medicine
* We ALL need to be on the same page (BHAGs)

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.

* Ancillaries are low risk so they can fund bigger goals
* Maintain time lines for meeting goals
* Performas for the larger deal (ASC/Land/Hospital)
* Maintain current referral bases and increase footprint
* Review finances with our people (our financial talent is strong)
* Infrastructure: EMR/EHR – interchangeable, interconnect and consistent throughout
* Morale/culture: I want to see if what is presented is REAL for the business – this requires me getting in the middle of these conversations
* Continue inserting myself in meetings where my instincts tell me I need to be

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.

* Frazier and I partner, get in the middle of the business plan and evaluate all parts from finances, employees and future building
* Maintain timelines for each of the goals and assess them weekly/Monthly
* Ancillary deals done by the end of one year and benefiting everyone. Looking at land and potentially starting buildout for new ASC/Hospital

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?

* Partnership is in place
* Everybody on same page for success – no greed factor
* Maintain focus and Timelines
* Change a few personnel
* Increase footprint through other providers

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?

* We’ll have increased company size, value, ancillaries, footprint and brand

## 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).

Upon partnership, Lew, RB, JR and myself will first increase the ancillary components (described above) of Tarpon to help finance larger acquisitions through this first year (ex. Hospital). We will increase the size and foot print of Tarpon to be the largest neuro-musculoskeletal complete healthcare center in the North Texas market

## 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.)

The largest and most successful complete neuro-musculoskeletal Healthcare center in the North Texas market.

## 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.

I like my previous one so far…😊

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