



Vision Statement Worksheet

Employee Name: _____

Job Title: _____

Date: _____

Objectives
Outline what the organization wants to be
Define decision-making criteria
Create a vision that inspires
Establishes a framework for ethical behavior
Enlists external support
Explains to shareholder where the organization is heading
Makes recruiting talent easier
Guide management thinking
Clarify growth rate, values, and responsibilities to employees, customers and society

Questions	Answers
What time frame do you want our organization to consider 3 years, 5 years?	
What geographic scope will we serve?	
What are our key products or services?	
What target markets do we serve?	
How will our products or services expand?	
What will we provide that others cannot?	
What will make others feel passionate about the organization?	
What new things do we intend to pursue?	
What future customer needs do we need to satisfy?	
How will our customers/clients change?	
Who will be our best customers/clients?	
How many customers/clients will we have?	
How much will our revenue grow in this time frame?	
How might our staffing needs change?	

Writing a Vision Statement

Step One: Make sure your Vision Statement has a Time Frame, Revenue Goal, Target Market, and Geographic Scope.

Example fill in the blank: By 20____, _____ will generate \$ _____ in revenue, by serving the _____ market with a _____ geographic footprint.

Step Two: Make sure your Vision Statement presents an image of the future that is:

- | | |
|------------------------------------|----------------------------|
| Tangible | Desirable |
| Focused (clear & well articulated) | Feasible |
| Purposeful | Meaningful (values-driven) |
| Ambitious | Inspirational |
| Shared | Unique |

Write a Vision Statement incorporating the above criteria:

Step Three: Rate your Vision Statement [with Rating boxes]	Rating				
Tangibility & Desirability					
Does your vision statement provide a strong imaginable view of the future?	5	4	3	2	1
Is it desirable?	5	4	3	2	1
Focus & Feasibility					
Does it provide clear direction for where you're heading?	5	4	3	2	1
Does it give a clear target market?	5	4	3	2	1
Does it define your customer clearly?	5	4	3	2	1
Purpose & Meaning					
Does it provide a larger sense of purpose for all stakeholders?	5	4	3	2	1
Are the organization's values clear and honored?	5	4	3	2	1
Ambition & Inspiration					
Does your vision statement represent a stretch?	5	4	3	2	1
Does it represent the pinnacle of success for your organization?	5	4	3	2	1
Will it inspire others?	5	4	3	2	1
Will it make others feel passionately about the organization?	5	4	3	2	1
Is it engaging and challenging?	5	4	3	2	1
Shared & Unique					
Does it utilize the organization's core competencies?	5	4	3	2	1
Does it demonstrate awareness of the organization's assets, people, unique qualities, resources, history and culture?	5	4	3	2	1

5	High
4	
3	Medium
2	
1	Low

Step Four: Revise your Vision Statement
If you gave your Vision Statement a 3 or less in any of the above categories, reflect on why you came up short. Return to your statement and revise it, so that it's strong across the board.