



*To take someone on a journey,
you need to know where you're going*

DEFINING THE VISION

A story in business needs a clear vision: a purpose. Everything that you build into the story will point back to that vision. This is where many stories go wrong. A clear vision may either be missing or poorly defined.

It's essential that the vision is outcome-oriented. If the vision is achieved, then you have succeeded. To define it, simply ask yourself the question:

What outcome should result from the delivery of this story?

Defining the vision doesn't have to be a complex task but there are some pitfalls to avoid that would otherwise compromise the effectiveness of the story.

A multinational bank in Europe was about to embark on a major technology project to implement a suite of business support systems required to enhance their internet banking service.

The consulting team supporting this project wanted to advocate the use of a particular methodology (for project planning and control), feeling that their client's routine project management approach was unlikely to be adequate for such a complex engagement.

Alice, the responsible consulting manager, tasked a member of her team, Dan, to build a story around their proposed approach and to build an accompanying presentation.

"Make sure that your material is good", she said. "In two weeks we need you to fly to Germany and present this story to the client's executives. It's important that we get them on-board."

Dan got to work enthusiastically. With a strong background in project management, he was well suited to the task. Two days later Alice passed by his desk to check on the progress.

"What is the vision for the story that you are working on?" she asked.

“To inform our client about the strengths of our project planning and control methodology in technology projects,” Dan replied.

Now a question to the reader: Is this a good vision for the story? Probably not.

A story’s vision should be outcome-oriented, not action-oriented.

To “inform” is an action, not an outcome. In storytelling we don’t want to talk for the sake of talking. We need a much higher-arching ambition when we build a story.

Alice explained this to Dan and together they reformulated the vision for their story:

To gain our client’s confidence in the strengths of our planning and control methodology and to ensure that any associated concerns are understood and addressed.

Gaining their client’s *confidence* and ensuring that any associated *concerns were understood and addressed* were the two outcomes that they needed to get the green light to move forward.

In this case, the latter part of the vision was particularly important. Their client was often quite conservative. They tended to come to meetings, nod in agreement for an hour and then nothing would happen for 4 weeks. It would be essential for Dan to

understand their concerns during the session and find ways to address them before real commitment could be secured.

Dan returned to the development of his story. Inspired by the new vision he shaped the story and its content in quite a different way than he had initially intended.

Two weeks later the presentation was well received by the client executives who subsequently agreed to adopt the proposed methodology.

Six things to consider when defining a vision for your story

When building a story always start by defining a clear vision:

1. **Think about outcomes, not actions.** What outcomes should result from your efforts to build and deliver this story? Make sure that the vision that you define is the one that you really want to achieve. Avoid Dan's mistake!
2. **Make it a formal process. Write it down.** Even for a complex story the vision statement should be one or two sentences at most. Be specific through the prudent use of vocabulary. Everything that you build into your story will point back to this vision.
3. **Remember that the vision is for you.** It's about *your* agenda and the outcome that *you* want to achieve. It's not something that you usually share with your

audience or include in the content of your story. In our example, Dan's vision was not the headline of his story, but the story's flow and content were designed to achieve it.

4. **Ensure that the vision is in-context and refers back to the receiving audience.** The receiving audience should be mentioned in the vision statement, "our client," in the example above. It's important that you define your ambitions relative to your audience.
5. **Make sure that the ambition-level of your vision is realistic.** The vision refers to the outcome to be secured immediately upon completion of the delivery of your story, not the completion of a lengthy project or engagement.

A vision to "persuade a client to buy a complex solution," after the delivery of a story in an initial one-hour meeting is probably over-ambitious, whereas the vision to "capture a client's interest in the solution and to identify questions that need to be answered moving forward" would be more realistic.

6. **When co-developing a story, align on the vision first.** It's not uncommon for a team to be working together on a story, each member responsible for developing a different part. Start by agreeing on the vision and get everyone on the same page. As a result, your team members will be pulling in the same direction, you'll save time and create a more cohesive result.

Some examples of vision statements

- For a team working in human resources, presenting a diversity strategy to their executive team:

To gain management approval to move forward with our strategy and to agree on any adjustments that are needed.

- For a sales team, presenting an offering to a client:

To gain agreement from our client that our offering is superior to that of the incumbent vendor.

- For engineers in research & development, pitching a new idea to marketing and sales:

To gain alignment with marketing and sales on the best go-to-market strategy, sales approach, and timing for this new offering.

- And for a manager presenting a change initiative to her team:

To empower our people regarding their achievements, to ensure that they understand why change is needed, and to highlight the opportunities this brings for everyone, addressing any associated concerns.

Chapter summary

- A story in business needs a clear vision: a purpose. Everything that you build into the story will point back to that vision.
- The vision should be outcome-oriented, not action-oriented.
- Make the definition of the vision a formal process. Write it down in one or two sentences.
- Make sure that the ambition-level of the vision is realistic. Can it be achieved upon completion of the delivery of your story?

Next steps

Select a story that you plan to deliver in the near future. Use it as a personal case study as you navigate through this book.

Begin by defining your vision using the guidelines presented in this chapter and note it down. If the vision is achieved when you deliver your story, will you have succeeded?