

Vision & Mission, Excerpt from Manuscript

Leadership

Saving Your Organization From Chaos,
A Practitioner's Handbook to Operational Efficiency, Effectiveness, and Harmony.
(McElroy, 2019)

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Section II: Looking Ahead

Chapter 1 Organizational Vision (Looking Into the Future)

If you don't know where you're going, any road will get you there.
Attributed to Lewis Carroll

The plans of the diligent lead surely to abundance, but everyone who is hasty comes only to poverty.
Proverbs 21:5

*I shall be telling this with a sigh
Somewhere ages and ages hence:
Two roads diverged in a wood, and I—
I took the one less traveled by,
And that has made all the difference.*
Robert Frost

Often misinterpreted, Frost isn't actually suggesting that the *path* taken made all the difference (look closely, he *sighs*... look back to the poem's beginning, both roads were "just as fair"). He is, in old age, after the journey's end, looking back. He is, if you will, reflecting and wondering "Hmmm, I wonder where I would be if I had taken that other road." Short answer: In the same place! Where Frost's traveler is at journey's end is not so much a consequence of the road chosen, but rather the traveler. It is the traveler that confronts obstacles, road blocks, and problems. It is the traveler that has some sense of the destination, which influences decisions along the way. If we know where we want to end up, we can straighten any path to get there.

This was conveyed by Stephen Covey in his classic *The 7 Habits of Highly Effective People* (1989). He suggests to "begin with the end in mind." This *vision* is all important, as we saw with Frost's traveler, but also for any organization, for any individual. If our decisions along the way are only influenced by the circumstances of the immediate situation and not by a vision of destination and destiny, much like a rudderless ship tossed by the sea, we have no idea upon what shore we will be cast. Vision is all important.

In that we're considering visions for organizations, let's glimpse at what business scholars say of it.

The Basics of Organization Vision

Textbook's commonly inform business students variously that an organizational vision statement is a brief expression of *what* the company wants to be, *why* the organization exists and *where* the organization is headed. So, aspiring business people are taught of the organization's vision that it is basically, from what, why, to where! (Probably why some in the scholarly community claim that there is no definition of vision statement!) Generally, management and organizational behavior students are not significantly exposed to organizational vision statements. Students of leadership, recognizing that a chief responsibility of leadership is to *have* a vision and to *share* the vision with others, are told that their vision has to be "*ideal* and *unique* image of the future" and that it acts to "*unify* and *inspire*" others. So, they learn of vision's substance and results.

Organization change scholars seem to best capture a description of an organization's vision statement:

“Vision defines an organization’s overarching purpose and captures the reason for its existence in a way that allows members to feel good about their efforts. Vision reflects the aspirations of a manager’s unit. It offers a reason why members of the organization should feel some passion about successfully executing the strategy. Where a good strategy and objectives engage people intellectually, a vision engages people emotionally” (Tushman & O’Reilly, 1997, pp. 48-49).

Turning back to Jack Welch, former GE CEO, Tushman and O’Reilly use his vision statement for GE from over two decades ago as illustration, “GE will be the world’s most aggressive, innovative actor in any business sector in which it operates. GE will be the fastest, most simple and self-confident organization in the world” (1997, p. 50). Do you think that GE employees had to look up the vision statement in GE’s annual report, refer to the framed plaque hanging in the hall, or to a wallet-size card? No, they *lived* the vision statement!

While the scholarly community claims that vision statement cannot be defined, let’s use for our working definition this one:

Organizational vision statement is a vivid mental picture of a future reality for a targeted group whom have an interest in, concern about or benefit from products or services provided; that acts to change perception of, thinking about and behavior toward production of the product or service.

That’s a mouthful! But, basically you must have a vision for the future of your organization in which all directly or indirectly effected by your organization have a clear picture, that there will be a sense of harmony for their vision of the future.

Let’s look at a simple example.

I grew up watching westerns on TV. Part of many but central to one of these shows was the wagon train. *Wagon Train*, starring Ward Bond, was a TV series from the mid-1950s to mid-1960s. (You can still find it on the Internet... you can find ANYTHING on the Internet!) The theme of this show was a strong and hardened trail-master, Ward, aided by his trusty crew every week led groups of Midwestern farmers “out west”. (Okay, sometimes they led hapless Easterners, but that is another story!). They always experienced obstacles along the way. Every week they were confronted by thieves, unscrupulous men from “back East,” hard-cases that just wanted a fresh start, and “town folk” that they came across on their journey that were in trouble. But Ward and crew overcame the obstacles (always with some underlying moral message) and led the wagon train on. They had a *vision*.

If you took a break from reading (and *quickly* came back!) to view a couple of Wagon Train episodes you see that Ward instilled not just in his crew but also all those in the wagon train a sense of vision. Notice how many times that someone on the wagon train stares far off into the distance, a dreamlike look coming over their face and explains what it’s like “where we’re a-goin’.” They had a sense of destination. They could mentally see it. They could feel it, hear it. They knew how life would be. They knew what that “good land” would produce. Notice a couple of critical aspects of these exchanges: What they knew and how they knew it.

Notice what they knew. If you scurried off to watch another episode of *Wagon Train* you saw that these wagon train travelers were vivid in their descriptions of destination. They were detailed. There is a palpable sense of emotion in how they recount the description of where they are headed, well beyond merely an intellectual understanding. There is a psychological element to many of these traveler's stories; many closed their eyes and said, "I can see it, why ... it's *beautiful!*" They could close their eyes and visualize it!

The Power of Organizational Vision

Visualization!

Risking going too far afield of our exploration, let's briefly consider "visualization" (aka, guided imagery). First, what does this even mean? Fundamentally visualization is the ability to mentally create a three-dimensional object from a one-dimensional source, like a picture. Second, the brain cannot differentiate between real and imagined experiences. I know, strange, isn't it? But, think about it. The brain never stops you and asks, "Hey, where did this info come from? What is the source?" The brain conducts no test. The brain simply takes in stimulus—*regardless of source*—and treats it as valid. (That's why we need to be so careful with the questions we ask ourselves! The brain takes the question as valid, develops an answer, then constructs a life that is congruent with that answer. So, don't ask, "Gee, why am I *soooo sloooooo?*" The brain will tell you!) Third, it can be leveraged for change!

But, what could this possibly do with organizational vision?

The brain and these mental functions have been leveraged for personal change. They can as well for your organization. The old classic *Psycho-cybernetics* (Maltz, 1960) deals extensively with visualization, what it is, how it works, and how to leverage it for personal change. (If you haven't read it, it is well worth your time.) Maltz goes into a description of early brain research and how it establishes a scientific foundation upon which we can construct a better understanding of how lived experiences act to change one's self-image. Long before there was an understanding of the physics at play in making this happen (Stapp, 1993) and before a solid link to the neurological basis to learning (Changeux & Konishi, 1987) Maltz outlined a key concept: *Repeated focused thinking will cause brain changes and result in observable shifts in physical and intellectual patterns of behavior!* (I researched years ago the notion of changing intellectual behavior. McElroy, 2012) The ability to *think* yourself to change has been harnessed in many fields including golf (Jason Dufner actually attributes his understanding of visualization to Russian weightlifters!), body building (Arnold Schwarzenegger), movies (Jim Carrey and Will Smith), Olympic medal winners (Lyndon Rush, Missy Franklin, Troy Dumais), as well as business leaders (Linda Boff, GE's executive director of global brand marketing, leverages "data visualization"). Jack Welch, (see, especially, Chapter 8 "The Vision Thing" in 2001), one of the top business persons of our lifetime, facilitated visualization with the aid of a picture drawn on a cocktail napkin! This is how *Wagon Train's* travelers exhibited such an intense knowing what their destination was. This is how your organizational members will powerfully embrace your vision for the organization.

Think about how they knew it. Let's start with how they *did not know* the vision! Ward Bond did not sit alone, the kerosene lamp casting long shadows across the rough-hewn floor boards of the wagon train's office. We don't see him, repeatedly dipping his pen into the ink well, writing a vague vision

of their trip, to then seal with wax and put into the bottom door of the well-worn desk at which he sits.

However, this is much of what I've seen of organizational vision statements.

Many vision statements, that “fluffy stuff” that the executives and the HR folks drafted, are filed away in the dark of a bottom desk drawer. Sometimes I'll find them framed and hanging in the reception area (evidently more intended for visitors than employees!). Sometimes I'll find them printed on small laminated wallet-sized cards tucked away with other seldom used cards in overstuffed wallets. However, I most usually find the vision statement gaining prominent position in the annual reports. I can always find vision statements on the organization's web site. But, where is it not? Emblazoned on the hearts of the organization's members!

So, *how did they know?* Where was Bonds vision statement? In his mind and in his heart. How did he convey it? In the stories that he told. Again, too far afield of our exploration here, but leader's stories are a powerful mechanism to deliver a compelling message (Gardner, 1995). We can almost see Bond, sitting by an open campfire, cup of coffee in hand recounting to wide-eyed novice travelers what he's seen, “I can close my eyes and see it! I tell you... it's a wonderful place. Soil's rich, water plentiful. Why, a family could do very well in a place like that!” (Thanks, Ward!)

This is what YOU should do. Bring your organization's vision statement out into the light! Dust it off. Incorporate the substance of it into routine meetings, exchanges, reports (think about regularly reporting progress toward vision!). Make it just part of normal activity, to think about, tell stories about “where we're a-goin'!”

Make your organization's vision statement vivid, compelling, and embraced! Tell stories about it!

The Source of Organization Vision

Let's take a quick peek back at Stephen Covey's (1989) advice: “begin with the end in mind.” Of course, that's where we want to start! But, how do you get that end in mind? From where does it come, does it originate? The vision does not come so much from *what* it is as it does from *why* it is. All important is the fact that the final destination fulfills a fundamental need!

Let's explore this a bit through the help of Bond's wagon train! We know that somehow he coupled the destination (California) with people whom wanted to go there (our travelers!). Okay, much like the chicken or the egg, which came first? We could imagine, for example, that Bond simply knew California. Perhaps he had frequently visited there. We might even find him during one of his visits sitting on the beach at Santa Monica in his swim trunks, barefoot, wearing his sweat-stained cowboy hat. (Sorry, I digress!) If we start with the notion that Bond simply knew about California, then we are left with the proposition that he went back to (let's say) Ohio and convinced people to make the trip back to California with him. He would, then, have the task of convincing people he comes across whom have no idea about California to simply drop everything, leave all they had all that they had worked for and seek a new beginning in a place they knew nothing about. However, none of the TV episodes shows him in the mercantile store, brochures in hand, talking people in to abandoning their farms and taking the harrowing journey with him.

What do we see?

We see people approach Bond, “I hear you’re goin’ out West. We’d like to bring our wagon alongside, if you don’t mind.” These people had a *notion*, if you will, that things could be better. They had a *need* to go from where they are to a new place. They had a *dream*. They had a *reason*! So, we might find Bond talking with one of the town folks, taking off his sweat-stained cowboy hat and wiping the sweat from his brow with an old bandana, saying “Well, if you folks have your minds made up I’ll take you.” Bond was only the vehicle by which they fulfilled their dreams.

So, who were these people approaching Bond? Who are those you desire to serve?

The Recipient of Organization Vision

Stakeholders; someone with an interest in or concern about your organization. You may want to preach *the Word*, but if you have no one sitting in the pews you have no church. You may want to save the whales, but if no one cares about whales you have no cause. You may like making widgets, but if widgets serve no purpose, fulfill no need and no one buys them, then you have no business. Your organization vision has to align with the needs to those that will ultimately benefit from the products and services of your organization.

Remember earlier I said that you must have a vision in which all directly or indirectly effected by your organization have a clear picture that there will be a sense of harmony for their vision of the future. These are your stakeholders, all directly or indirectly effected! Your vision statement paints a compelling picture of how your organization will satisfy their needs. Let’s explore this. Let’s turn back to the mission statement mentioned earlier:

“GE will be the world’s most aggressive, innovative actor in any business sector in which it operates. GE will be the fastest, most simple and self-confident organization in the world.”

Let’s break this down a bit and examine the *why* behind this key statement. Take a look at *aggressive* and *innovative*. Of all the things that Jack Welch could have envisioned for GE he built his organization on aggressive and innovative. Why? From where did the notion of aggressive and innovative come? Did they just *like* being aggressive and innovative?

While we don’t have the benefit of old black-and-white grainy TV episodes to watch much as we did with *Wagon Train* we can imagine the GE conference room during vision statement workshops. “Where do you think we should go,” someone might ask, “Yeah, what do you think we should do?” another adds. “Gosh, I don’t know... this whole starting with a blank flip chart is hard!” We can almost see Jack stand up, sleeves rolled up, with three used Styrofoam cups of coffee on the table in front of him and say, “Well, team! How about we start here: What do the people want? What do our customers expect of us?”

Let’s reverse-engineer this. We have aggressive and innovative. Why was this designed into the heart and soul of the organization? Why, at the exclusion of so many other things, did aggressive innovative make it to the GE vision statement?

Think back to when Welch took over GE in 1981. What had been happening in the world up to that point? The end of World War II in September 1945 gave rise to a boom from the late 1940s to mid-1960s (thus the “baby boomers” of 1946-1964!). Manufacturing decimated in most of the world—especially the UK, Germany and Japan—America was the world’s manufacturer. America could do no wrong! If America made it, they bought it! Life was good.

However, America took its collective eye off the ball. What were industrialized nations doing around the globe? Recovering. And, improving. Too far afield to explore in-depth here, we know that Japan was aggressively rebuilding during that time. But, not to their pre-war practices. They had invited Edwards Deming, pioneer in the quality movement, to Japan (Aguayo, 1990). America uninterested, Deming went to Japan and taught the Japanese manufacturers all he knew about strong, efficient, *quality* manufacturing. They listened. They learned. During this time Konosuke Matsushita, one of Japan’s pioneering industrialists, in Japan the “god of management,” took a small family-owned electric business with manufacturing located in the family home to the company we know today: Panasonic (Kotter, 1997)!

Japan’s manufacturers wanted to be *better* than before, they wanted to rival the industrial giants of the world. They introduced customer-focus, speed, innovation, and quality into all that they did (Imai, 1986). The world finally noticed, at least by the 1970s. Japan was aggressively entering and taking over one industry after another, from TVs to cars. From computers to steel. Japan was aggressive. Japan was innovative. Japan was cleaning America’s clock, as they say! This is the world of GE in 1981.

For GE they *had* to be aggressive and innovative. Their customers had grown to expect this.

What about GE being the fastest, most simple and self-confident organization in the world? Much as aggressive and innovative this can be reverse-engineered and traced directly back to customer expectations!

Your vision is where your stakeholders expect to find you!

The vision of *where* you want to go dictates your mission. It is to the mission statement we will turn in the next chapter. (But, if you’d like to first work through creating a vision for your organization you can go straight to **Error! Reference source not found., Error! Reference source not found.** on page **Error! Bookmark not defined.**)

Chapter 2 Organizational Mission (or, Know Thyself)

*Ghost-like dreams, welling up from your soul;
Voices calling, your spirit's destiny awaits.
What shall you be, what shall you do?
If only you knew.
Better to banish the ghosts; better to silence the voices.
There's nobility in the task; pride in the activity.
Perhaps "you" will emerge from the scurry.
Perhaps...*

We each have a personal purpose.¹ We may not be able to articulate it, we may be somewhat unsure of what it is; but, we know, we seek.² The search for purpose and meaning of life has been man's quest since the beginning.³ We ask: Who am I? What am I supposed to do? Why? Answering these questions seems to give us direction in life. As a former U.S. Navy submariner (yes, another analogy!) I find it gives me ballast and a navigational aids (or, open sea coordinates!). Knowing one's purpose helps us navigate life! It helps us synthesize all that we are in action and belief. Our life would seem more congruent if only we knew our purpose.

It is the same with your organization.

Yes, before equipment, before office space (and, which desk you'll purchase: wood or metal?), before the new computer program, and before the schematics to the latest proverbial "widget" are drafted, there has to be "purpose." The mission statement—and, more importantly, the *drafting* of the mission statement—defines your organization's purpose and informs all subsequent decisions. It will be a guiding document in designing the organization. Without it, as Thom S. Rainer and Eric Geiger (2006) suggest in *Simple Church*, relative to a clear mission statement for the church, they could suffer *ministry schizophrenia*. They say that this malady occurs "when churches and church leaders are not sure who they are. They are not clear what their fundamental indemnity is (Rainer & Geiger, 2006, p. 21).

You'll find drafting your mission statement to be an iterative process. For example, as you consider one element of the mission statement you may find that what you have so clearly identified is something of significance, importance for another element. You go back. You amend, strengthen, and expand that element before returning to the mission element upon which you were previously working. Back and forth... until, all elements seem to weave a coherent tapestry of meaning!

Now... let's get started.

What is a mission statement?

Technical Definition

Technically, it is a statement of your fundamental organizational *purpose*. It should include what you hope to *accomplish*, your *objective*. It should reflect the *philosophy*, *values*, and *principles* of your

organization. It should reveal your corporate *culture*. This is what I teach business students.⁴ However, as Jack Welch, former CEO of GE, says “[the mission statement is one of the] most abstract, overused, misunderstood words in business” (2005, p. 13). Strange, isn’t it? A statement that can do some much for an organization, can *be* so much for an organization is somehow so ... weak, vague, so personally meaningless to the employee and his or her employer. Its general uselessness is why we find most mission statements framed and hanging in the hall just outside of the breakroom, on laminated wallet-sized cards, and emblazoned on the front of all corporate public relations material; but, we find most mission statements are ignored by the employees! We do not find it on the mind of the employees. We do not find it in the *heart* of the employees!

Too far afield from the purpose of this book, one might include in the reasons for such disconnect is the way business people are taught.⁵ Developing a mission statement has to be very practical. Using it has to be equally practical. It has to be *put into action!*

So, let’s turn to the practical aspects of the mission statement.

Practical Meaning

The mission statement has to be a useful tool for the organizations. As I mentioned, the mission statement should inform all subsequent business decisions. Let’s again turn to Jack Welch! He says that an effective mission statement is basically, “How do we intend to win in this business?” (2005, p. 14). Well, yes; this is the kernel of making a strong and effective mission statement. Very practical! Emerging from this kernel are clearly defined elements of the mission statement. These elements guide the organization and tells others who we are, what we do, for whom, and with what tangible benefit for those we serve. So, for our work here let’s accept this working definition of mission statement:

A succinct foundational statement of purpose which clearly articulates the underlying building blocks for achieving it, including skills harnessed, work done, market served, and benefit derived by the customer.

We’ll explore in the next section how to go about developing a strong mission statement; but, in the interim, let’s look at a few mission statements that meet part of our working definition:

Aflac: “To combine aggressive strategic marketing with quality products and services at competitive prices to provide the **best insurance value** for consumers.”

What do we see? Aflac clearly articulates the customer’s derived benefit: value. You’ll see this emphasized in their advertisements. Man has accident. Man is in traction at the hospital. Man loses wages. Man has hospital bills. Then... (cue the music)... the duck shows up! Aflac will help the man recoup some of the lost wages and hospital bills. Ever hear to which radio station most people are always tuned? Yep, WIIFM! What’s in it for *me!* People—customers, clients, congregations—are interested in what *they* will get, how *they* will benefit. Business 101: always keep in mind a picture of those you have organized to serve! You can never lose sight of the fact that you are only organizing to address an issue (need, problem, or desire) that *people* have. (Yes, even animal rescue, to a significant degree, is established for people. What might they address? Our sense of moral obligation to all of God’s creation. I know, too philosophical for our practitioner’s guide to

organizing! Nevertheless, it is helpful to keep in mind that for any *cause* it is to *people* that we will turn.)

How might this mission statement be made manifest in Aflac? What would we see inside of the Aflac organization? We would expect to see in Aflac's internal process, the *how* they go about delivering "value". We would expect to see well-designed and executed processes. No costly process losses. Money saved in providing the service goes to monetarily helping the client with health issues. We would expect to see superb customer service. That man in traction will not want to "jump through hoops," or "fight through all the red tape." Just a guess, but I bet Aflac personnel have spent a *lot* of time thinking about practical ways to deliver "value"!

Let's counter this. Could Aflac have a mission of delivering a logical and responsible insurance package? Sure. Would their advertisements look different, emphasizing their different purpose? Probably. What about internal organizational structure, work processes, and areas of competency? Again, probably different than currently exists.

Let's look at another.

Bristol-Myers Squibb: To **discover, develop and deliver innovative medicines that help patients prevail over serious diseases.**

There are many key themes that are reflected in this one sentence mission statement!

What do we see here? What do they do? They *discover, develop* and *deliver* innovative medicines. Do you see how this informed their organizational design process? They "discover... innovative medicines." What does this suggest to you? How would you "discover"? You probably would ensure that you have a strong research and development (R&D) program. It is so important that it probably has a prominent place in the organization (yes, you can see it really high in the classic org chart! But, more on organization design later!). R&D probably reports directly to the CEO! This element of their mission statement informed their decisions about organizational alignment and structure.

Speaking of discover and innovative, what does this suggest to integral organizational competencies? What kind of knowledge, skills and abilities would you ensure exist inside of your organization? Looking inside of Bristol-Myers Squibb we would probably find a strong Human Resource (HR) effort to recruit and retain world-class researchers. They most likely are always "keeping an eye out" around the world for such talent. HR has probably coordinated with the Public Relations (PR) section to ensure that information is published within the "community of researchers" that might attract researchers to join the Bristol-Myers Squibb team! Aligning organizational capabilities to mission is not an accident! This element of their mission statement informed their decisions about *who* they need (what caliber of which knowledge, skills and abilities) and *how* to go about finding it.

What else do we see in Bristol-Myers Squibb's mission statement? They "develop and deliver... medicines." No, they are not strictly R&D. We would find high-quality manufacturing facilities. We would find world-class manufacturing⁶, would find strong supply chain management, and superb logistics capability.

Anything else in Bristol-Myers Squibb's mission statement? Remember WIIFM? Bristol-Myers Squibb's has organized to "help patients *prevail* over *serious* diseases." Do you see how this has informed their decision-making process? To what do they focus R&D? To "serious disease". This has informed their strategic planning (in at least strategic objective, strategic approach, and strategic alignment). Think about how this would inform the clear identification of corporate values and how they would act to ensure these values permeate ALL corporate actions.

What does a mission statement do?

The mission statement is that unmovable point by which we navigate. Back to my Navy days, much like the North Star the mission statement is that constant beacon that guides the organization in design, development, strategy and routine operational decision making and problem solving. The mission statement steadies the organization in a turbulent business environment.

While this is true (and helpful!), it seems somewhat vague, perhaps too philosophical. Let's take a step down, move away from this lofty perspective and get closer to a very practical understanding. We'll soon move into drafting your mission statement (page 15) where you will answer a series of four questions that pertain to your mission—who are you as an organization, what do you do, to or for whom do you provide a product or service, and with what tangible benefit for the consumer of your product or service—but for now let's take a peek at a very practical application of the mission statement.

Most have heard of the old *elevator speech*! An elevator speech is essentially a short statement—commercial, if you will—about your organization. It derives its name from the imaginary 30 second ride in an elevator where you concisely describe to someone riding (trapped?) in the elevator with you exactly what is the core of your business. In this short ride the concept is to be so aware and knowledgeable of your business that you can deliver a short yet informative and compelling message about what you do, the market you serve, the competitive advantage your company enjoys, the heart of what you provide to your customer. The old saying goes, if you cannot explain your business in 30 seconds you don't know it well enough! We teach this to MBA students as they start to draft a business plan. Most trained in sales are well-familiar with it! They have well-honed elevator speeches. You should, too!

Your mission statement is your elevator speech!

Let's consider a case where an organization lost sight of their guiding mission and got lost: Quaker Oats. Most probably have a very familiar image in mind, the picture of a white-haired Quaker on a red round container. Oats! Oatmeal (porridge). Oatmeal bread. Oatmeal cookies. *Oatmeal Scotchies* (yes, you can add small delicious butterscotch morsels to an otherwise oatmeal cookie!). And, who could forget their clothing. Clothing? Quaker Oats has a clothing line? No. No longer!

[RESEARCH CASE STUDY]

Focus clothing

Strategic objective

Strategic Approach (cover more extensively in a later chapter), bombing while dropping paratroopers

Market

Ethical behavior

Values ...Frames values from which behavior is manifest implied

Philosophical position to life

Upon the foundation background that we've established let's now turn to building up on it!

How does a mission statement work? And why it matters!

The parts of the mission statement form a picture of the whole! Let's explore how this works... and why it matters! (I promise we won't go too far afield!)

Looking back at our journey thus far we know that the mission statement is a foundational statement of purpose. We know that there are four fundamental parts which we identify by answering four elemental questions. We know that the mission statement helps the organization stay on course. We know that it does this by providing a clear single beacon by which the organization navigates through unknowable future decision making and problem solving.

But, it seems contradictory. It is a one *statement*. It has *four* parts. It describes *today*. It is a *single* reference point (beacon). It helps the organization stay on course by guiding a *myriad* of unknown, unexpected, unanticipated future decisions and problems. Four somewhat independent mission statement parts; but, one singular whole point by which the organization navigates. We create the mission statement *today for an unknowable future, it is a single guide that we aid us in many diverse situations*.

So how does the mission statement inform future decision making and problem solving? Comparatively, open sea navigation is easy to that of keeping an organization on course! We know what the North Star is. We know it exists! We know how to find it. We know how to determine "north". We know how to steer the ship. But, with the organization we have to transform the statement into a guide point. We have to have some faith that the guide point will not shift due to the circumstances in which we find the organization. How? How might this mission "picture" help us navigate through a turbulent sea of business where challenges will arise unexpectedly, unknown?

There is a psychological basis.

The German word for it is *Gestalt*. Some might be more familiar in its application: Gestalt therapy⁷. Gestalt means "to take shape." Again, too far afield for our work here, but, the history behind how this works in the human mind is very interesting.⁸ Basically, Max Wertheimer discovered the concept in the early 20th Century while on a train embarked on vacation. Stationary objects seemed to have movement as he peered through the window of the moving train. We can imagine this by considering old, early 20th Century silent movies with the jerky images. While this is actually singular pictures seen in rapid succession the mind perceives movement! The mind, if you will, will connect

the dots. The mind will make sense of parts. The mind will create a picture, and even more, the mind will create a “reality” from these parts. The whole is not simply the parts. Wertheimer suggested that the whole has a reality of its own. An illustration of this is seen in Figure 1. You will see that a picture become evident from the pieces.

Figure 1, Gestalt Illustration

Why does it matter? The mission statement cannot do everything and be everywhere. Somehow it has to act upon, influence an individual or individuals at a distance in situations and circumstances that cannot be recognized when the mission statement was written. We know, however, that the mission statement does not act like a Ouija board or a magic 8-ball where the organizational leader can look to it for advice! The mission statement is an adaptable picture which influences behavior in every situation.



So, what does this mean for your organization? You will not have to be in every place, every minute of the day, involved in every decision or problem resolution. All in the organization can make decisions and solve problems with a clear understanding of what the organization demands. All will be clearly informed by the prevailing picture that each in the organization has in mind, “well, this is just who we are!”

How do you draft your mission statement?

Now, let’s get to work! In three easy steps, as they say, you can create your mission statement: 1) answer the questions about each element of your mission statement, 2) consolidate, synthesize, narrow that list, and 3) weave each precise element description into a tapestry revealing your organization. But, first, let’s briefly revisit our working definition of mission statement:

A succinct foundational statement of purpose in which clearly articulated are the underlying building blocks for achieving it, including skills harnessed, work done, market served, and benefit derived by the customer.

We will next walk through answering each of the questions represented in our working definition! I have provided in **Error! Reference source not found.** on page **Error! Bookmark not defined.** a handy worksheet for you to take notes as you go through this exercise. Once done, the parts simply tacked together, a little wordsmithing and as they say *voila!* You have a workable mission statement.

Who are we?

Question #1: “Who are we?” You recognize that people represent the “intellectual capital” of an organization; you accept that the people represent the greatest investment that you’ll make in your organization.⁹ Risking a mechanistic view of organizations (remember that they are complex dynamic systems!), the people are the engine of your organization. Without people nothing will be accomplished.

You also recognize that *how* work is accomplished is equally as important as *what* is produced. The end does not always justify the means! So, you need to invest well in the *right* people. You must ensure that the people forming your organization adequately align to both *what* and *how* you envision for your organization. Answering this question helps you identify the strengths that come together in order for your organization to survive.

Organizational Competencies

Your organization must have the correct set of competencies. The answer to this question helps identify necessary competencies that must reside in your organization. Forming a mind's eye "picture" helps you see the required knowledge, skills, and abilities (KSA). For those with a Human Resource (HR) background (or colleague, friend, or spouse that does!), you know that answering this question is foundational to developing both employee recruiting tools (e.g., HR KSA assessment exercise which, in part, contributes to the development of the job description) and training programs.¹⁰ Well before drafting job descriptions, well before developing training programs, the mission statement lays the foundation. The mission statement makes the first Gestalt line, the first dot by which the Gestalt will help you mentally connect with others. There is in the mission statement the first emerging image of the competencies which reside inside of your organization!

However, there is more than competencies that define who you are!

Organizational Values

Those in your organization must have shared values which reflect those of the organization. The piece represented by a sense of organizational values contributes to the greater Gestalt whole! Most business books speak to this (you've probably read many of them!). But, my guess is that they left you a bit uncertain about what to do next. Values are important, but they seem somehow "fluffy," little more than "business babble." This probably arises from the various disciplines which undergird an understanding of values relative to an organization: organizational studies and theory, management, leadership, social theory, ethics, general and organizational psychology. So, in that business schools harvest concepts from so many fields of study it should probably not be a surprised to find that they reap such a diverse mix of business ideas about "values". So, let's make sense of it all for *your* organization. Let's explore next "values" relative to: what they are, how they work, and why it matters to you and your organization.

What are values anyway? As I mentioned an understanding of values depends on which *discipline* lens through which you look. Business students are taught that values are "guiding principles," something that "characterizes" the organization, something that provides "unity and cooperation," and that values can change with new initiatives.¹¹ They are taught what values *do*, but not what values *are* or, once known, how to go about integrating them into an organization. Management students fare no better. Some are taught that they must engage in "value-based management;" but, are not informed as to what values are or how to go about being "value-based". Other management students do not have values broached in their study!¹² The disciplines of leadership and organizational behavior are the areas that give the business student somewhat more guidance on values. These are taught that values are a set of core beliefs, beliefs about what is important, code of conduct, preferences concerning course of action.

What does this even mean? What are values? Our working definition for organizational values is:

A set of core beliefs which clarifies right and wrong in regard to and congruent with self and organization regarding internal and external organizational interactions toward productive and sustaining behavior.

Values clarify how we should act to be true to ourselves and supportive of organization in all of our interactions.

How they work? How are values expressed in the organization?

Let's look at this through a very practical lens. Turning back to the wisdom of Jack Welch, he teaches that "values are just behaviors" (2005, p. 17). Yes... and no! No, values themselves are not behaviors; but rather, the driver of manifest behaviors in your organization. Values, if you will, cause behavior. An ice cream cone is not hunger; but, an ice cream cone can make you hungry! So, are values just behavior? Well, yes. You won't necessarily *see* "values" as you walk through your organization; but, you certainly will see how people behave! A vivid illustration is a prisoner of war. His or her behavior may change, adapt without abandoning core values (external stimulus, coercion). As the old saying goes, "a man changed against his will is of the same opinion still." Behavior has changed, but even a cursory examination will suggest that the behavior does not match the prisoner's value system. They make movies about this! But later, of course, this same individual upon returning home, may shift their value system of their own volition resulting in a noticeable changed behavior (internal stimulus, evolution of beliefs). Behavior contrary to one's value system is mental pathologically where there is misalignment of thought and deed (or, the behavior is coerced). As with the individual, so also with the organization. An organization's values influence observable individual behavior relative to interactions both internally and externally, constituting on whole a recognizable pattern of organizational behavior.

How are values learned in an organization?

Your organization's members learn from the leaders! It is important to recognize that internal values made manifest (seen, visible) is by external behavior. Values, then, are known by the action they influence. Organization members *learn* values by *observing* behavior. Chief determinant of prevailing organizational behavior in a cause-and-effect relationship is the leader's behavior. Leaders acting as role model is critical. Think about it like this: When a child at home growing up did you know what behavior was acceptable in the family? Probably (or your Mom might have applied corrective guidance to the seat of your pants!). Was the *behavioral norms* procedure posted on the refrigerator door, held in place by a magnet? NO! So, how did you *learn*? You observed. You behaved (or, misbehaved!). You were gently nudged back on the "straight and narrow" path! Remember, similar to learning through observing worked in your childhood, so too with your organization: Your organizational members will learn from you!

Why it matters?

There is strategic benefit having organizational behavior align with espoused organizational values. Most notably it leads to greater employee engagement and, then, organizational goal achievement. Value alignment is beneficial in that your organization will ultimately be successful in accomplishing the development and delivery of intended products or services.

But, equally important is the manner in which this is done affects internal and external relationships. Remember that an organization's values influence observable behavior. So, a value-guided dynamic of interactions suggests lower stress, more harmony, greater productivity, greater customer satisfaction, and, ultimately, profitability. But, values also contribute to the design and operation of processes by which the organization executes tasks. Let's turn to a very practical example.

A health care organization may espouse values such as compassion, consideration and empathetic patient care. We might expect that the organization's HR department has designed a process by which they seek to ensure new candidate values alignment with the basic values that the organization holds dear. However, a quick review of HR hiring practices suggests that there is only weak link with or influence of values on HR employee recruitment practices: HR seeks individuals based on credentials, not their values. They do not, generally, seek and recruit on organizational values. They *want* compassion; but, they search for *five years of experience*. They need *empathetic patient care*; but they look for a candidate with a science degree. You see? There is no strategic link here between the recognized values that reflect *who* the organization is with the *how* the organization searches for, recruits, and brings new members into the organization. Much like a physical body rejecting a transplanted organ, alien misaligned values within an organizational body will not work.

Let's turn to another very practical example of how this *should* work. Let's look at an alignment between an organization's values and the HR process that works toward alignment of candidate's personal values with those of the organization. Let's look at Southwest Airlines. Their value statement is:

Southwest Airlines is dedication to the highest quality of Customer Service delivered with a sense of warmth, friendliness, individual pride, and Company Spirit.

We see espoused the values of warmth and friendliness. What standard resume section covers this? What credential certifies this? None! So, how does Southwest Airlines ensure that their new employee candidates actually embrace the values that Southwest Airlines so dearly embraces, those on which they strategically operate the airline? HR has an interview process that incorporates questions that reveal the candidate's values system! For example, "warmth". They may ask "When did you go above and beyond with a customer?" "What is one thing you like about helping customers?" "Describe a situation when you went 'above and beyond' for a customer." Considering "friendliness" they may probe with questions such as "Describe an experience which you had with an angry customer?" Candidates may be asked to "tell a joke;" with the assumption that someone that can spontaneously remember and tell a joke during the stress of interviewing must be "warm and friendly"! The organizations values influenced the hiring process. Not skills. As a matter of fact this is known about Southwest Airlines simply because it is so visible. They say as much. They say they don't hire for skills. They can train for skills. They hire for three attributes:

1. a warrior spirit (a desire to excel, act with courage, persevere and innovate);
2. a servant's heart (the ability to put others first, treat everyone with respect and proactively serve customers);
3. a fun-loving attitude (passion, joy and an aversion to taking oneself too seriously.)

Southwest Airline employee candidates must demonstrate that they hold the same values as evidenced by their historical behavior. *Saying* they do is not enough. They must *show* that they do!

Remember, there is more than competencies that define who you are! We've explored values. Let's now consider that there must be a complementary set of ethical principles in your organization.

Another slippery slope! Ethics! Some thought that the consideration of ethics had been left behind in the classroom. Now, here we are considering practical concepts of operating an effective organization and looming before us is the old philosophical haze of ethics. Like a fog rolling in off the bay, ethics seems destined to blanket our perception. So, okay, what are ethics about in an organization? As we said of values, ethics can be considered *behavior*.

I know, I suggested that *values* dictate behavior. Now, I'm confusing the point by suggesting that ethics also dictate behavior. Bear with me! Let's briefly (very briefly!) explore ethics and the foundational concept upon which they are constructed. And, most importantly for our task here, to understand how it all applies to organizations.

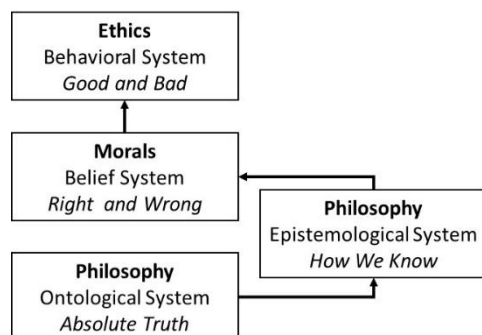
Organizational Ethics

Ethics is a branch of moral philosophy.¹³ It is centered on conduct, what, essentially, is *good* or *bad* behavior. We know this from our childhood! Caught with our hands in the cookie jar can we remember Mom scolding us that “you’ve been a bad boy/girl”? We know that we have behaved badly. It is much the same in organization! An executive with his/her hands in the proverbial cookie jar will have emblazoned in headlines of the morning newspaper (or scrolling across the top of your iPad screen) that “Company caught in unethical behavior!” What we do (behavior) is good... or bad.

Let's dig down one more level. Ever question how the newspaper knows ethical from unethical behavior? On what they base their claim. Upon what do we construct the idea of *good* and *bad*? Morals! Our sense of morals, essentially, is a belief system about what is *right* and *wrong*. Our moral belief system reflects our views about what is right and wrong. This reflected moral light on right and wrong influences our ethical behavior, good or bad.

Now, one more level (I promise!). Upon what do we build our moral belief system? You guess it! Another branch of philosophy! Our moral beliefs rests upon an ontological system: a branch of philosophy centered on the nature of reality, absolute truth! (Yes, philosophy has many branches!) Our understanding of good and bad behavior rests upon our belief system about what is right and wrong which is undergirded by our understanding of reality, of absolute truth! But, we're not quite finish with our exploration!

Figure 2, Ethical System



Now, the last piece of the puzzle! The final ethical Gestalt stroke: How is a sense of truth communicated to form a belief system? The “truth” information must get transmitted somehow. Again, you guessed it! Philosophy has an answer: epistemology! Epistemology is another branch of philosophy (so many branches, so little time) that deals with the theory of knowledge. We can think of epistemology as “how we know what we know”. There must be an epistemological device that transmits the knowledge of reality or absolute truth in order to form a

moral belief system. There is! For many of us it was our parents. For some, Grandparents helped us “grow up.” For some it was the community, a special teacher, the culture in which they live. For

these “truth givers” where did they find the answers? Christians turn to the Bible. Jew to the Torah, Muslim to the Qur’an. All have an epistemological device by which the knowledge of truth is transmitted as necessary to influence the emergence of a recognizable moral belief system! (Unless, of course, you ascribe to postmodernism relativism where there is NO absolute truth—“its relative”—but that is another book!)

Now, back to behavior (thus ends our *Reader’s Digest* excursion through philosophy!). My view:

Value-based behavior is relative to interactions (governed by underlying principles about good and bad) for productive and sustaining behavior. To act otherwise is pathological.

Ethical behavior (governed by an understanding of good and bad) is relative to an assumed moral standard (right or wrong) upon which we act in accordance with our understanding of reality, of absolute truth for a coherent life. To act otherwise is to be in irrational denialism.

An organization’s value system may emphasize “warmth and friendliness”, while their ethics system calls for honesty and integrity. Both are pertinent to your organization.

Organizational Interaction

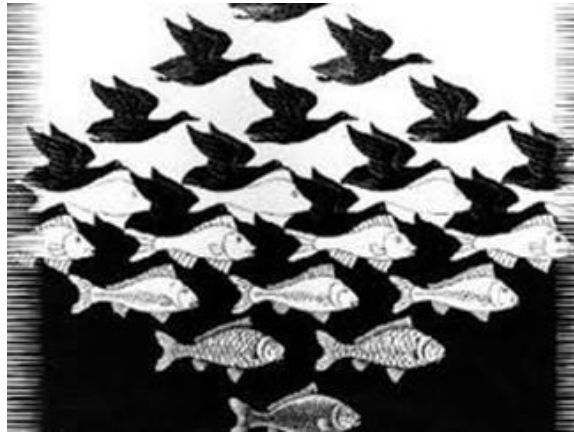
Again, there is more than competencies that define who you are! Now that we’ve explored values and ethics as influences on organizational behavior (interactions) let’s now turn our attention to the working relations (patterned interactions). Your *individual* employees or members must become a cohesive *whole*; *people* must become *team*. Edgar Schein, pioneer in organizational psychology, suggests that “every group must *learn* how to become group” (1997, p. 92). Of course, Schein suggests groups as cohesive teams. Individuals do not simply coalesce into recognizable work groups or teams. The success of your organization is not determined by individuals; but rather, by the working *team* that they become. Teams are developed!

As I previously mentioned people are the engine of your organization, they represent perhaps the greatest outlay of capital for you. However, simply having a bunch of knowledgeable *disconnected* people will not ensure that tasks are strategically accomplished. And certainly not in an efficient, effective and harmonious fashion! It is here, in the mission statement, that you start to form an idea of the internal working relationship of the people. It is in the mission statement that you start to visualize the kind of recurring pattern of interaction that will be productive in your organizational endeavor. It is another Gestalt line contributing to the picture of “who you are”. You should ask, “What is their working relationship?” “What kind of interactions do I want?” This is far more than boxes on the traditional org chart! Will your people be close-knit, work virtually around the world, be free-wheeling innovators (aka, skunkworks), or closely adhering to regulators and customer wishes? It is in the mission statement where this is first glimpsed!

Teams are developed. We intuitively accept this; we watch on TV “our” teams come together on the court or field. Sports players seem to come together so effortlessly. We applaud the coach (and often pay highly!). We know that there was a lot of hard work, a lot of practice, a lot of coaching, a lot of coach pre-planning, scouting, recruiting, introduction, coordination... but, hey, we’re just here to watch! The coach strategically developed the team!

You are your organization's coach! All management students are taught about the five stages of team development: forming, storming, norming, performing, and adjourning. We won't go too far afield here; but, suffice it to say that a greater organization-wide team will go through similar stages as does a work team. It is facilitated in this by two things: leader guidance and understanding of "theme," model, or "picture" of them as team by the mission statement. And with this our Gestalt has all of the lines necessary to form a recognizable picture of organization.

Figure 3, Gestalt Team Formation



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EndNotes

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² Luke 11:9

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