Future of Business and Finance

Thomas E. Anderson, II

Visionary Leadership

A Guidebook for 21st Century Organizations and Entrepreneurial Teams

Springer

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I dedicate this book to my wife Jamie, and my two daughters Arianna and Azalia. Thank you for sharing this work with me.

Foreword

My first encounter with visioning and visualization techniques was 50 years ago when I was 11 years old, taking karate lessons from a very traditional Sensei. I remember being shown how to use visualization to enhance the outcome of a kick, punch, or other technique that required precision and accuracy, and how it significantly accelerated the development of my self-defense capabilities overall. Although there was no scientific grounding in visioning and visualization at this time, I could not refute this tradition that existed for decades, if not centuries, and how it helped sharpen my own skills as a young martial artist.

Although, deep inside, I realized the efficacy of visualization through my own experiences, I would often have difficulty sharing it with others, as some would consider this time-tested Eastern tradition to be mythical or mere credulous at best. It simply was not embraced in the West, and for having no scientific foundation as to its effectiveness, it was often dismissed. It would be years later before I would begin to hear about others practicing visualization in sports or some other tactile exercise that was captured in smaller, highly contained academic experiments.

Some earlier experiments were beginning to prove the effectiveness of visualization in improving the shooting of basketball hoops or playing the piano, leading to a statistically significant progression. Then, in the early 1990s, new experimentation was beginning to show results in the practice of mental rehearsal and the impact it was having on professional development in areas such as nursing, acting, and other disciplines that involved non- or less physical coordination efforts. Other research began to show the impact that visualization had on muscle memory, with muscular and even cellular memory being impacted by a preceding non-physical visualization exercise.

In the late 1990s, I began to incorporate visioning and visualization techniques into my consulting practice. Although I was a practice leader with a leading global consultancy, I chose to start with smaller, pro bono engagements with local nonprofit organizations to see if visualization could impact the outcome of the strategic planning process. The results were remarkable, going far beyond what I had anticipated. Participants not only were able to visualize the outcome of a strategic concept, but when done in a group setting (i.e., with an entire board or executive committee), there was also a noticeable alignment that was formed among the participants. Then, after months of follow-up with the groups that participated in the strategic visioning process, I began to receive feedback from various individuals indicating that the implementation of the strategic plan seemed easier than previous, more traditional strategic planning programs. Through visualization, there was a sense or belief that they had actually experienced doing the work before, which made them more confident in carrying out each task. I was beginning to see the first positive results of visioning and visualization when applied to strategic planning and management.

For the next few years, I continued offering strategic visioning services to local libraries, churches, philanthropy organizations, art museums, and community groups to expand on and improve the methodology and processes used in my practice. The positive results continued, as well as the constructive feedback, which helped generate even more efficacious outcomes. In one engagement, a senior board member of a regional non-profit informed me that after participating in the visioning process, it was as if she were tuned into a new frequency, like a radio station, helping her block out the irrelevant noise while manifesting things that directly aided in the execution of her vision.

Although visioning and visualization were still considered unconventional at the time, in the early 2000s, I decided to begin introducing my own vetted techniques to my professional clients. Although some did decline to use visioning and visualization in their strategic planning process, there were many more that were open to using it. And while the technique utilizes an opening meditation to help center the participants, it was amusing to see some clients request that I not use the word "*meditation*" when introducing it to their teams. With some minor adjustments to the methodology and associated visioning techniques, I continued to see positive results, both during and sometime after the visioning exercise took place.

This methodology was eventually introduced to and used in many large companies across a variety of industries, including consumer products, life sciences, industrial manufacturing, professional services, and more. The outcomes continued to demonstrate consistently positive results. I knew then that it was time to write a book on the topic, sharing the experiences of the many organizations, both large and small, who have endeavored to incorporate visioning and visualization into their strategic planning programs, and in 2007, I published the book *Breaking the Musashi Code: Transcending Competition Through Visionary Strategy*.

I realized at the time that such practices in the corporate world were still considered somewhat unorthodox, but I felt that the time was right for the public to hear about the experiences of these organizations, offering a step-by-step methodology for consultants and others who wished to take on the practice. In the meantime, and totally unrelated to my work, there seemed to be much more research being introduced on the topic. And the research continued to build on each preceding experimental or observational phenomenon, leading to a rapid increase in scientific knowledge pertaining to applied visioning, visualization, and mental rehearsal. Furthermore, there are now countless other organizations that have since incorporated visioning and visualization into their developmental activities—partly due to the rapidly increasing body of scientific knowledge on the topic but also because of the demonstrative efficacy it brings to so many areas of personal, professional, and organizational development.

Now, with this remarkable new book, *Visionary Leadership*, Thomas Anderson has developed a collection of historic and contemporary research on the topic and has expressed this new knowledge in such a way that makes it more accessible to both academia and the general public. Thomas has managed to create a tapestry of new evidence embroidered with the threads of his own story and personal experiences. This brilliant new work will do more to promote the field of visionary leadership than any other individual contribution of scientific literature previously published on the subject. What this book offers is a unique and very digestible story of the progression of the field, offering a new sense of legitimacy for those who may have once doubted its utility.

In addition to strategic planning, many new avenues and disciplines can now be enhanced by visioning and visualization, thanks to Thomas' creative new exposition. We can now see the applicability of these efficacious techniques to professions and disciplines such as general leadership, coaching, healthcare, business transformation, human capital management, athletics, teaching, as well as the humanities. As we develop a deeper understanding of the benefits of visioning and visualization we can begin to incorporate it into various aspects of our personal lives, including simple tasks of preparation and outcome rehearsals for those activities that do not come easy to us. I encourage you to read on and experience for yourself this transformative contribution to scientific literature and to explore new ways this remarkable discipline can be incorporated into your own personal, academic, and professional lives.

Chief Innovation Officer, Ezassi, Greenville, SC, USA Matthew Heim
May 27, 2024

Preface

While smack-dab in the middle of writing Chap. 4, I received astonishing yet remarkable news. As soon as I finished the section on entrepreneurial autonomy and follower empowerment, I received word that one of my case study organizations was thrust into a leadership change. What happened to Steve Jobs at Apple circa 1986 was happening before my eyes. The founder of Viridian (the company's name has been changed to protect the innocent) had been replaced by an experienced, professional CEO. When I found out about the top leader's exodus, I began asking myself a ton of questions. *Where did the founder-CEO of Viridian go wrong? When did they start on the slippery slope? What actions signaled this descent? How did their values and ethics play a role? What drove them to make the decisions they made? What advice would I have given them to prevent this from happening?*

I decided to write this book to prevent founders from being replaced after their companies enter an aggressive growth stage that requires new skills to fulfill the role. Considering the frequency at which founder-CEOs are replaced leads to two points of intrigue. What does it take to equip a founder with the skills of a professional CEO? And how long does this process take?

The founder-CEO's journey to lead a high-growth company begins with the ability to see their role within the company—and the company itself—through new lenses. It requires a CEO to evolve and grow with their company. Their plans for the company are ever-expanding, but the visionary should not solely set their sights on new horizons. Their ability to see within their company should become more granular as well. No single leader can know everything. As companies grow, a founder's most formidable challenge is learning when and how to trade their autonomy and control for more valuable resources. In the process, they discern the company's greatest assets for vision development and realization are not intellectual or even real property. Their greatest assets are the people who have joined them on the adventure of creating a new future—even if within an established company.

I have perceived a need among founder-CEOs for a mental model of vision development and realization. Business schools do not provide such a model. As a result, visionary entrepreneurs and new business owners take shots in the dark. Or lead companies based on their technical areas of specialization. When it comes to leadership that sees the big picture—they fly by the seat of their pants. A mix of intuition with benchmarking against competitors drives the day. The business owners may achieve levels of success for themselves, but how much success are they achieving for their collective organization? The answer could be "minimal success," "moderate success," or "much success." But can you imagine how much faster they could achieve success for the whole organization if equipped with a full-cycle mental model of vision development and realization?

CEOs can get caught up in a whirlwind that quickly becomes a vicious cycle. But what if they could transform vicious cycles into upward spirals using the same forces at play in their organizations? What if we could harness natural forces and their power to change our organizations, transform our employee and customer experience, and improve our own lives and others' lives beyond anything we could imagine?

When I began working with multiple organizations after starting my business, I lacked the tools and knowledge to succeed. With each new topic learned—coaching, consulting, facilitation, or organization development—I always squirreled away gems about individual and organizational vision. Eventually, the answer hit me, and I began a quest to understand how vision works.

I have assembled a framework that represents how the phenomenon of vision development and realization works. I do not profess to have all the answers, but I have spent the better part of two decades studying vision development and realization in over 50 individual, team, and organizational cases. This framework is continually in development and has been for the past 18 years. It is based on a synthesis of studying vision-related leadership principles, personal experience, and observation. Business and leadership programs provide pieces of this model in a disjointed fashion, but Vision360 is the first work that I know of to present such a comprehensive framework. In developing this model, I have considered all types of literature, from natural and biological sciences to leadership and organization theory to futures studies and design thinking methodologies. My goal is to equip founder-CEOs with a mental model of the vision development and realization process using the knowledge acquired while working on various levels within organizations of all sizes.

Who Is This Book For?

This book was written especially for founder-CEOs, visionary leaders, and entrepreneurs who have launched out into the deep waters of a new endeavor. The scalable Vision360 framework is designed for:

- CEOs and executive leaders practicing "big 'V' visioning"
- Future entrepreneurs who want to establish a new business
- Leaders of independent startup organizations
- Leaders of new teams within existing organizations
- Intrapreneurs considering a venture within an existing organization
- Upper and middle managers who are transforming business units, departments, and teams to align with an organizational vision
- Project managers engaged in visionary initiatives within existing organizations.
- Leaders who are trying to tease out a preferred future direction for their companies
- Leaders who want to engage their people in creating a shared vision for the future

- Business and leadership professors
- Students of business and leadership

How Can Vision360 Be Used?

Vision360 helps leaders and entrepreneurs to anticipate the ups and downs of iterating a vision with their teams. This model is intended to scale for small and large ventures and smaller startups within larger companies.

This book can be used in the following ways to:

- Adopt a more comprehensive mental model to lead a new organization
- Figure out how leadership, organizational, and future-related dynamics fit together
- Understand how to make your vision more granular for teams and team members
- Envision the future of your organization and to visualize the final product
- Locate the position of your organization or team on the vision journey
- Learn more about how vision is created, implemented, and realized
- Troubleshoot problems and factors stifling vision development
- Course-correct or map out a new vision journey
- Impart vision to others
- Serve as a reference

Purpose of the Book

Vision360 is both a culmination and a new beginning. It represents a culmination of personal observations of the phenomenon. It also marks the beginning of a new phase of study to test the book's assumptions in different types of organizations, industries, and market spaces. I have written this book *in spite of* a lack of experience climbing the corporate ladder and *in light of* my unique professional, business, and entrepreneurial involvements. My personal and professional background—combined with a penchant for long-term projects and an absurd ability to handle uncertainty— has allowed me to observe and work with over 50 organizations, entrepreneurs, and professionals at various life stages and points on the Vision360 journey. Thus, I have written this book:

To inspire and educate the next wave of visionary leaders, entrepreneurs, and managers. This group includes business owners and leaders who may or may not want to enroll in four-year business programs to learn how to implement their vision. Also, the book is for professionals changing careers, coming in from other fields and industries with decades of experience in corporate America or small business ownership. This book aims to give them the scope, perspective, and perception needed to successfully conceive, create, implement, and realize their vision.

To support veteran professionals who may be entering a different space or have considered trying their hand at business ownership or new venture development. This book can help take lessons they learned through observation and small "v" visioning (e.g., on project teams or as heads of functional departments) and apply them in a new setting.

To present a vision development and realization model and walk through its various stages to illustrate fundamental, evidence-based principles grounded in existing research on vision-related leadership.

To illustrate principles, facts, and best practices using anecdotes and stories from startups, high-growth firms, entrepreneurial companies, and visionary initiatives within established businesses.

What Differentiates This Book and the Vision 360 Concept?

For the past 50 years, writers have left a trail of breadcrumbs for visionaries to follow. (Incidentally, a few of the best insights have not received as much as an honorable mention in the books' indices.) However, in my searches, I was hard-pressed to find a comprehensive and scalable model that explains how vision development and realization operate within organizations. When gleaned, the vision-related insights serve as pieces of a puzzle that, with a bit of synthesis and assembly, yield a more detailed and complete picture of what vision development looks like from a high level and over the lifetime of an organization.

Vision360 applies new and emerging scholarship to expand the concept of visionary leadership for twenty-first-century organizations. These theories include complex adaptive systems (Olson & Eoyang, 2001), vision-based leadership (Kantabutra, 2006, 2008, 2009; Kantabutra & Avery, 2002), vision integration (Kohles, 2001; Kohles et al., 2012, 2013), strategic leadership (Ireland & Hitt, 2005), strategic foresight (Hines & Bishop, 2015), lean startup methodology (Blank, 2013; Blank & Dorf, 2020; Ries, 2011), organization development and change (Burke, 2018; Rothwell et al., 2016), creativity and innovation (Davila et al., 2006; Michalko, 2006; Schrage, 2016), and design thinking (Kumar, 2013; Liedtka & Ogilvie, 2011). Vision360 does not rewrap visionary leadership in a new package. Vision360 assembles academic and popular press insights and first-hand observations of the vision development and realization phenomenon in over 50 organizations to reconceptualize how vision happens in organizations. It also proposes vision iteration as an alternative to traditional thinking around visionary leadership. The conceptual framework reflects how organizations navigate four overlapping phases of the vision development and realization cycle at different levels and during various life stages.

Vision360 does not replace the phenomenal vision-related content that came before it. Despite its inherent strengths, visionary leadership is limited to the creation and communication of a vision by a leader or leadership team, usually in an existing firm. The visionary leadership paradigm fits within vision development and realization and, thus, works within the boundaries of Vision360. This book adds to and recontextualizes vision-related principles for twenty-first-century leaders and organizations. The strategic foresight model also complements this work, as do principles of strategic leadership, organization development, and change.

The Winding Road to Vision360

I began work on vision development in the most unlikely way. I started in the spring semester of my senior year of undergrad when I was studying architecture under Celia Imrey. I was struggling to make architecture relevant to my experience working in music and an idea that I had to start a business later in life. Little did I realize, this idea was hurling toward me at the speed of light and I would soon start that business after graduating from Columbia University. Celia recommended that I research a little-known concept called anamorphosis. She told me that it was an old concept, and I would have to dig deep to find it. And dig deep I did. I remember going to Avery Hall on Columbia's campus, climbing up to the balconies, and using ladders to find dusty books that likely were filled with parchment mites, but I didn't care. The concept of an image changing its appearance based on the vantage point of the viewer sounded fascinating. After a few hours of scouring the library, I was ready to apply the idea of perspectives, vantage points, and distortion to my final design project. The review, or "crit" as architects famously refer to it, did not turn out to be stellar nor was it a raving success. But the process opened up a new world to me—studying anamorphosis introduced me to how human vision and perception works.

After graduation I could not let the concept go. The idea of anamorphosis was a game changer, I stayed up until the wee hours of the morning figuring out how to use it in my work. Little did I realize, this fascinating concept led to my own paradigm shift. I had been self-employed since the age of eight and was trying to determine whether I wanted to give up that freedom and get a corporate job. Sidebar: The gig economy has popularized self-employment and business ownership. But in the early 2000s, I faced a lot of pressure from friends and family members to get a "real job." I remember having a breakthrough one day saying, "there has to be more to life than this! There has to be more to life than a nine-to-five!" On a visceral level, anamorphosis was making me realize there were different ways to view my life and future career. So, I leaned into the musician work and built a small business around it. I began to see self-employment as a gift long before the gig economy became mainstream. In 2003, I also started a business with a broad future goal which gave me the opportunity to apply visioning to a new organization.

In continuing to research anamorphosis, I found it was important to zoom out to discover and understand how it applied to organizations. At the time, I was working for a church and decided to apply my learnings in a new role that I entitled "vision development coordinator." It is common for some religious organizations to adopt new ideas a decade or two after they become popular in the business world. The practice of vision development is no different. Whereas visionary leadership took hold in corporate America during the 1990s, smaller Black churches began to popularize the term "write the vision" during the early 2000s. The convergence of time and place provided an immediate context to study vision and change within an existing organization. Thus, I began my work on vision development.

Why am I telling you this? One of my colleagues says, "your bio reveals your bias." In this introduction, I want to state my experiences up front. My experience with visionary leadership is different from others. It is shaped almost sequentially by my experiences as a self-employed musician, a middle manager and public speaker in faith-based non-profit organizations, a support person within two of the largest school districts in the country, and a coach-consultant-facilitator in small businesses and startups.

How do my experiences inform this handbook? As a subset of charismatic and transformational leadership, visionary leadership has certain boundaries that were baked into the equation and responded to the moment in which it emerged. These boundaries work together to define the paradigm of visioning within organizations. In a passage on fasting in Mark 2:22–23, Jesus explained that if a person pours new wine into old wineskins, the wine will burst the skins, resulting in wasted wine and ruined wineskins. A better option is to pour new wine into new wineskins.

The next thing I tell you will break an unofficial "no technical jargon" rule. The passage in Mark coincides with the idea of "containers"—a concept that has been popularized in organization development and the study of complex adaptive systems. Containers set boundaries for a self-organizing system (Olson & Eoyang, 2001, p. 11). Containers also define the "self" it organizes and may be:

- Physical (e.g., geographic location)
- Organizational (e.g., team or department)
- Conceptual (e.g., identity, vision, processes)

Conceptually, vision is most closely associated with visionary leadership despite appearing in other leadership approaches. Organizationally, visionary leadership most commonly happens at the top tiers. Geographically, visionary leadership theory originated in the United States. Much like an overgrown houseplant, the twentieth-century container for vision development is bursting at the seams.

Make no mistake. Visionary leadership is alive and well. It is also limited. The existing organization forms the northern and southern boundaries of its container. The eastern and western boundaries are highly guarded by the top leader and the executive management team. These limitations cut visionary leadership off from 75% of the vision development and realization process. At the same time, visioning within collective and entrepreneurial contexts has expanded beyond its original boundaries. The image of a fearless leader who captivates a group of followers by painting the picture of a brighter future is forever linked to visionary leadership. This handbook ventures beyond the scope of traditional visionary leadership theory to focus on more than just communication and vision statements. It adds insights from several writers and researchers who have jumpstarted the process, proposed alternatives, and made inroads toward furthering the concept. The handbook explores the common ground between strategic leadership, foresight, and vision.

Leaders, no doubt, need a tool to connect the dots—a new container to explore vision and accelerate its realization.

I call this new container Vision360.

Despite my best attempts to help you contextualize and intake this information, you may not agree with everything that these pages contain. Everything here may not directly reflect your personal or professional experiences. If that is the case, I want to hear about it. Send me an email at thomas@teaiiano.com. There may be parts of this book that resonate with you. If so, drop me a line and let me know that also.

Instead of being swept up in the whirlwind of everyday activity, a founder-CEO can move to the center of the operation, guide the vision iteration process, and use their agency to create opportunities for spontaneous interactions between actors within the organizational system—exchanges that allow team members to fulfill the vision daily. Such a leader can envision the entire system working together to reel in its preferred future. The visionary leader is the hub of this system. This is the idea behind Vision360 Leadership.

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11 Operating Principles of Vision360

Vision360 revolves around 11 key principles of vision development and realization and a fundamental observation: the paradigm for vision development and realization in organizations is changing. Traditional visionary leadership reflects the old paradigm wherein a single leader or cadre of top managers created an image of the ideal future, formalizing it in a vision statement. However, the way long-term vision is conceived, developed, and realized is shifting. Organizations are recontextualizing vision development to meet ever-evolving needs. The following principles are highlighted in each chapter.

Principle 1: The speed of change calls for a multidirectional approach to leadership Traditional visionary leadership moves in one direction: downward. The top-down approach presents major hurdles for twenty-first-century organizations. How so? It is impossible for a lone visionary or solitary stakeholder to stay up to date on every detail within a business's environment and internal operations. Thinking about the future is a team sport (Introduction).

Principle 2: Twenty-first-century visionary leaders create visionary organizations A leader should not settle for being a lone visionary. Their organizations can learn to see and craft a "good enough" vision. Helping team members to clarify their purview and line of sight using an emerging vision has great advantages. Creativity tops the list (Chap. 1).

Principle 3: Twenty-first-century organizations engage in a dynamic, multi-phased approach to visionary leadership Teams transform vision into reality by engaging the four meta-phases of development and realization. This book proposes vision conception, adoption, creation, and integration as four phases of the Vision360 leadership framework (Chap. 2).

Principle 4: Visionary organizations iterate vision Vision iteration starts with Vision 1.0. The Vision360 model positions leaders at the center of a four-stage process. At this convergence point, the visionary balances leader agency with self-organization to navigate the nine zones of Vision360 leadership. Entrepreneurial teams and established organizations can take the vision through several iterations when leaders give followers the freedom to test the initial vision (Chap. 3).

Principle 5: The starting point for a vision search is in an organization's peripheral vision, where the internal organization interfaces with the external environment Foresight practices, such as horizon scanning and scenario planning, anchor the vision in reality. Visionary organizations use foresight to detect weak signals of change in the business context (Chap. 4).

Principle 6: Adoption is not an afterthought Far too many visionary leaders directly or indirectly impose a vision on their organization. Herein lies the problem. A company's culture will launch an attack on new threats to the status quo. A new vision fits that description unless allowed to emerge from the culture. If a leader's main challenge is getting people to "buy in," the organization or team needs to rewind to an earlier stage of the Vision360 process to increase commitment through stakeholder involvement. Leaders should guide the vision creation process with an eye toward what it will take for organizational members to accept the collective vision as their own. Followers adopt visions they helped to create (Chap. 5).

Principle 7: Entrepreneurial teams de-risk new ventures by testing the founder's vision Experimentation is a shared visioning strategy used by startups and existing businesses. The ability to let go tests a visionary's ability to trade a little control for growth. Trusting team members with their big idea represents a giant step for some founders. The good news is leaders who empower followers to test their assumptions are more likely to increase investment readiness (Chap. 6).

Principle 8: Emergent and shared visioning practices are upending the traditional vision creation paradigm The image of a leader who single-handedly creates and communicates the preferred future is transforming into that of an iterative vision co-created through a collective and collaborative whole group process (Chap. 7).

Principle 9: Leaders diffuse a vision through an organization's culture and systems, initiating the transformation necessary for effective vision integration Leaders translate vision into action, using it to develop followers and transform the organization. By extending a shared vision in multiple directions throughout the organization, leaders create spaces that support spontaneous interactions on numerous system levels (Chap. 8).

Principle 10: Innovation culture empowers team members with creativity to make vision-based decisions Creative ideas fuel innovation, and confident leaders empower their teams to make decisions. 3M is well-known for its innovative culture. This is not by mistake. Developing and transforming an organization's systems helps leaders tap into the creativity of individual followers. Leaders can empower team members to make decisions based on the enduring vision and core values of the organization (Chap. 9).

Principle 11: A twenty-first-century organization continues iterating its vision to sustain velocity Goals are achieved, but vision is fulfilled. Vision development is not a one-off event. It is an ongoing, iterative process—and the exact opposite of the "one-and-done" vision statement creation approach. New horizons appear as leaders, managers, and employees collaborate to fulfill parts of the vision (Chap. 10).

Vision360 is intended for leaders of independent startup organizations of any size, leaders who are transforming companies and business units, managers who are aligning departments and teams with an organizational vision, and leaders of new projects within existing organizations.

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Abbreviations

BLS	Bureau of Labor Statistics
BSC	Balanced Scorecard
CAS	Complex Adaptive Systems
CEO	Chief Executive Officer
COGIC	Church of God in Christ
COO	Chief Operating Officer
COVID	Coronavirus Disease
CVC	Corporate Venture Capital
DEI	Diversity, Equity, and Inclusion
DNA	Deoxyribonucleic Acid
DSL	Doctor of Strategic Leadership
FRLD	Full Range Leadership Development
HBR	Harvard Business Review
HGF	High Growth Firm
IBM	International Business Machines
IPO	Initial Public Offering
LLC	Limited Liability Company
LOI	Letter of Intent
MBA	Master of Business Administration
MIT	Massachusetts Institute of Technology
MVP	Minimum Viable Product
MVV	Minimum Viable Vision
NATO	North American Treaty Organization
NIH	National Institutes of Health
NUMMI	New United Motor Manufacturing Inc.
OCAI	Organizational Culture Assessment Instrument
OECD	Organisation for Economic Co-operation and Development
OEM	Original Equipment Manufacturer
OVI	Operating a Vehicle Impaired
PEA	Positive Emotional Attractors
PESTLE	Political, Economic, Social, Technological, Legal, Environmental
PIF	Pitch-Investor Fit
PMF	Product-Market Fit

RFID	Radio Frequency Identification Device
RFP	Request for Proposals
RIM	Research In Motion
ROTFL	Rolling On the Floor Laughing
SAM	Serviceable Available Market
SARS	Severe Acute Respiratory Syndrome
SAW	Spirituality At Work
SME	Small And Medium Enterprises
SOM	Serviceable Obtainable Market
SWOT	Strengths, Weaknesses, Opportunities, and Threats
TAM	Total Addressable Market
TMT	Technology, Media, and Telecommunications
TQM	Total Quality Management
USD	United States Dollars
VUCA	Volatility, Uncertainty, Complexity, and Ambiguity

Part I

Expanding the Paradigm of Vision Development

Visionary leadership theory emerged in response to the economic, social, and organizational backdrop of the post-industrial United States. As such, specific principles and boundaries are baked into the theory. These parameters combine with mental models to define the paradigm of visioning within organizations. For example, the premise or primary assumption of visionary leadership is that a visionary leader sees the future vision and communicates it to the organization. By implication, the rest of the organization is absolved from the responsibility of seeing. Under this model, the central task for followers is to catch the vision and run with it. Conversely, the VUCA environment places the demand of seeing on the entire organization and not just on the visionary leader (for more on this topic, see Chap. 2).

In short, the current paradigm of visionary leadership is rooted in the assumptions and biases of twentieth-century leadership. Contrary to the belief of many leaders and followers, vision is not "mandated therefore accepted"—that is not the way preferable futures are pursued and fulfilled in real time. Consequently, leaders are experiencing a shift away from the visionary leadership paradigm of the twentieth century to an approach more suited to hold the challenges of twenty-first-century organizations in tension with the pursuit of a preferred future.

A handful of scholars have elaborated on the changing paradigm in visioning (Kantabutra, 2008; Kohles, 2001). In his dissertation on organizational vision integration, Kohles (2001) blazed a trail when he called for a "reconceptualization of vision," proposing:

> Vision can be communicated by "everyday or average supervisors and managers" to "everyday or average employees" to help these subordinates understand that the vision actually has something to do with their jobs and that they can use the vision as a guiding framework for their work. (Kohles, 2001, p. 32)

This reconceptualization allows organizations to treat vision as an innovation. As a result, stakeholders can accept or reject the vision or conduct experiments to test its utility in real time.

Expanding the scope of visionary leadership and vision development is not about creating new principles from scratch. For example, vision conception and integration are implied but not explicitly stated in visionary leadership literature. Additionally, in tracking the progression of vision in business and leadership literature, a trail emerges, beginning with transformational and charismatic approaches, which gave rise to the study of visionary leadership. Building upon these studies, more recent vision-related scholarship such as vision-based leadership has zoomed out to include an organizational focus.

Vision360 aggregates academic and popular literature themes to explore several latent yet essential points about how visions are developed and realized. These topics include (1) leader agency which incorporates more than single-handedly creating and communicating a vision, (2) the role of followers in iterating vision, (3) the impact of balancing leader agency with followers' ability to self-organize, (4) the value of shared visioning, (5) the link between visioning and strategic foresight or futures studies. Because more new businesses exist today than at the advent of visionary leadership studies, Vision360 reconceptualizes visionary leadership for entrepreneurial organizations and teams.

Part I emphasizes the shared approach to building an organization and entrepreneurial team. It suggests that involving stakeholders in the vision journey is just as crucial as the leadership approach chosen. The recommendation to take a shared approach may contradict traditional leadership styles, but it emphasizes the importance of involving stakeholders without excessive participation in every decision. This section introduces nine fundamental themes supporting the counternarrative of visionary leadership. These themes are essential for understanding visionary leadership in the twenty-first century and are used as analogies to illustrate organizational phenomena in relatable ways. Additionally, the book discusses how organizational cultures act like immune systems, deploying antibodies to protect the organization from outside threats and new ideas. Lastly, it explores the dynamic nature of organizations, implying constant movement and change resistance within complex adaptive systems.

Chapter Summaries

Considering the increased number of startups within the last 50 years, visionary leadership needs recontextualization for new ventures and founder-CEOs. There needs to be an integrative approach to vision-related leadership that reflects how vision development and realization happen in organizational contexts. This book reconceptualizes vision-related leadership for the twenty-first-century organization and the twenty-first-century leader. The "Introduction" section below recounts the Vision Journey every founder takes and explains how founder-CEOs and visionary leaders can shift their change narrative.

Chapter 1 addresses the research question "can an organization learn to see?" by unpacking a high-growth firm's response to the 2020 pandemic and its economic impact. The author draws insight from evolution and the biological sciences to illustrate how organizations learn to see through individuals located within a collective unit. Factors such as stakeholder engagement, time orientation, the scope of vision, and an examination of the periphery work together to inspire a vision search. Chapter 2 presents the Vision360 conceptual model after explaining the conceptual and theoretical foundations for the four-phase framework. Chapter 3 encourages leaders to use multi-directional leadership within the nine zones of vision iteration to find their sweet spot.

Introduction to Twenty-First-Century Visionary Leadership

We have all had a breakthrough idea—an idea that could change our lives, our families' lives, and our organizations. But not all of us have decided to go through with it.

BEEP! BEEP! BEEP! It's now 5:18 am. A person with potential beyond their wildest dreams turns over in bed and hits the snooze button on their iPhone alarm for the third time that morning. By 5:30, they drag out of bed, knowing they will be late, but they don't care. Like a pair of skis, their slippers slide across the floor to the bathroom. They brush their teeth, step into the shower, and emerge twenty minutes later feeling much the same as when they decided to forgo the fourth alarm snooze. Tired. Uninspired. But they press on because they know traffic starts to build earlier than it used to. "Why can't my boss just let me work from home?" Of course, that is a rhetorical question.

After fighting traffic for 60 minutes on the Beltway, they find a parking space about 200 feet from the building. They get out of the car and make their way into the building and onto the elevator. The doors almost close when they hear, "Could you hold the elevator?" They recognize the voice and decide against it. It's not that they can't wait to get to the piles of work waiting on their desk. They are just not in the mood for cheery small talk with a co-worker who could be a host on Good Morning America.

Walking down the hall, they trade pleasantries with a coworker before entering their office. They fling their coat onto a chair, plop in front of the computer, and shake the mouse to bring up their internet browser. Twenty new emails have arrived since they left home, and while on the way to work, they received two new meeting requests. Just as they hit "reply," a coworker barges into the office with a request. Already burnt out and on the brink of a meltdown, they look up at the co-worker and blurt out, "I can't do this for the rest of my life."

A few months ago, this emerging visionary entered a paradigm shift after gaining access to new information and experiencing an "aha" moment. This epiphany sparked new ideas. Suddenly, the visionary began to "think outside of the box." New ideas have started to flood in as the visionary begins to consider offering new products and services and pursuing unique opportunities. The prospect of doing things differently prompts the visionary (YOU) to consider taking off in a new direction.

Soon, you become a full-fledged member of the 4 am club. You know—it's the club that never sets a meeting date. The members rarely meet each other. And especially not at that time of morning. It's the club that wakes you up in the middle of the night with your ideas swirling in your head. You have been tossing and turning for about 30 minutes because you don't want to get out of bed yet, but you know your ideas will not let you drift off to sleep any time soon. Your club membership may have been active for so long that this routine has become your way of life. Why? Because there is not enough time, let alone energy, in the day for you to tinker with your idea and keep up with work and family responsibilities. So, you stay up (or even wake back up) at all times of the night to brainstorm—following your curiosity and giving in to a long-repressed creative nature. You feel excited and hopeful about future possibilities.

Moving forward with your idea brings you to a crossroads. Something has to change. On the one hand, you could do nothing with your novel idea. But that would be taking an even more significant risk than staying in your current job. On the other hand, you could talk to friends and family and run the risk of them saying your idea is "crazy." You could also take immediate action and go it alone. What a dilemma! Your creative idea is so out-of-the-box that you could never get it off the ground on your own. There's not enough time in the day!

So, you expand your network, connect with like-minded entrepreneurs, draft a business plan, and start experimenting with your big idea. That is just the first loop of your Vision Journey—the adventure every visionary takes to turn their dream into reality. Congrats on completing your first lap, but the story is far from over.

Let's fast forward ten years.

You have created a viable, thriving business from what naysayers deemed a "crazy idea." Each day, you are on your grind. Performing a balancing act. Firing on all cylinders at maximum utilization. You are managing through the day-to-day at peak performance. It feels like your organization has reached cruising altitude. Things are moving like clockwork. Then, the unexpected happens. You—the visionary-turned-leader—have another great idea.

The sheer magnetic pull of this game-changing idea pulls you into the second loop of your vision journey.

Just like the first time. The same feelings. The same late nights. As much as you may want to, you cannot control it. The entrepreneurial bug hits you, and you see an opportunity for your business to address an unmet need in the marketplace. So, you begin to work as you did before. You attempt to repeat the first loop of the journey despite having a team of people in place to help run the business. The lone visionary approach is what you know. So, you work with a select few to develop and deploy the idea. And you guessed it. The attempt falls flat, and the very organization you established eats the vision alive. Instead of meeting the moment, you stand by and watch competitors swoop in with the right product and service to meet the marketplace need.

That's the second loop.

By the third time around (I don't know if you've heard, but the third time is supposedly "the charm"), you have learned the lesson. People tell you, "You have a successful business…just stop there!" Instead, you hear, "You have a successful business…*why* stop there?" Thus begins the descent.

A quest for growth leads to a few ill-informed (read: "bad") decisions. Disruption from the outside leads to the abrupt introduction of a series of changes. Although measures of success are apparent, the change has produced undesired by-products. Resistance, tension, and the rumblings of conflict between individual workers and departments have evolved into a palpable feeling permeating the air. The problems have begun to outweigh the successes. At best, this can slow down progress and cause lackluster results. At worst, it can throw the vision into crisis.

Employee stress levels begin to increase almost imperceptibly. The organization starts to lose money. This loss is compounded by a time crunch. Workers are less productive than last year. Several key managers quit—taking all their company-specific knowledge with them. Morale dips. Engagement takes a hit. Employees don't trust their managers anymore, let alone each other. Work and life are totally and perpetually out of balance. Many workers are not showing up on time, if at all. The most productive workers will show up even when they are sick.

Relationships between workers and departments are tense. Conditions outside the organization are turbulent. Surrounded by a sea of moving parts, the visionary leader constantly manages through what feels like a whirlwind. And unfortunately, it is picking up speed.

Visioning in the twenty-first century is different from that of the twentieth century. For one, everything moves quicker with less time to "just figure it out." Businesses are growing faster in new industries, with younger CEOs. Visioning is happening in a much more complex system. Thus, visionary leadership in the twenty-first century will work differently than in the previous era. The days are gone when the senior leader communicated vision downward throughout the organization to employees who willingly implemented it despite having little to no say in its development. In its simplest form, this visionary leadership approach included three basic actions: creating, communicating, and accepting. The leader completed the first two actions—creating and communicating the vision. The last action, receiving the vision, was everyone else's job. In other words, after the leader told and sold the vision to the people, he automatically expected them to accept it with open arms. This approach may have worked in a world that changed at a glacial pace. However, the twenty-first-century business environment caused more complex change on a global scale and delivered a shocking new reality to leaders. Visionary leaders now realize that employees, managers, and sometimes entire teams can reject their vision (Fig. I.1).

A Paradigm Shift for the Twenty-First-Century Leader

Dr. Martin Luther King's "I Have a Dream" speech. Former President Bush's "1000 Points of Light" inaugural address. Bill Gates' "Tidal Wave" memo. When viewed in isolation, each example reflects the old paradigm of visionary leadership. Shorter company lifespans, rapid change, and global interconnectivity characterize the state of the external environment. Unprecedented uncertainty combined with followers' desire for participation has rendered the great man leadership approach ineffective. Rather than debate the strengths and weaknesses of the various leadership approaches and tactics, I will ask an important question: "*What is the most important thing for*

Fig. I.1 Visionary leadership versus the vision development and realization process

Exhibit I.1 Paradigm shifts in organizational vision development

Paradigm shifts in organizational vision development	
Twentieth-century organizations	Twenty-first century organizations
Top-tier leaders determine an organization's vision and strategic direction	People want to be involved in vision creation and strategy making
The vision development process stops when the vision and mission statements are created	The vision development process is ongoing—it does not stop
Vision development is an isolated, one-off event within the strategy development discipline	Vision development is a dynamic process, touching every aspect of organizational life
Increased profit is the highest aim of organizations	The highest purpose of organizational vision development is to positively impact society, beginning with an organization's stakeholders—profit is a by-product of doing this well

a leader to know to guide their organization toward a desirable future?" The answer lies in comparing twentieth- and twenty-first-century visionary leadership methods (Exhibit I.1).

When you hear the phrase visionary leadership, what do you think of? What images come to mind? Most folks think of the lone visionary. In the twentieth-century model, a charismatic leader would stand out in front of his subordinates and communicate what he saw for the organization. The leader may express his intention to take the organization in a new direction. He may also communicate an aggressive new growth strategy designed to best the competition. The most daring leaders would talk about getting in on the ground level—creating entire new industries and carving out new opportunities in existing markets. In any case, the focus was on the charismatic leader telling and selling a brighter future with the expectation that followers would get on board. Sometimes, they did not.

A significant problem with visionary leadership is that it moves in one direction: downward from the leader to the followers. This process of visionary leadership is limited, and the way vision development and realization actually happen in organizations is very different (Fig I.1). The way high-performing visions are conceived, created, and realized has experienced a paradigm shift. What brought about this new way of doing things?

The speed of change in the new millennium has rendered the command-and-control leadership style ineffective. It is impossible for a leader—or any single stakeholder—to stay current in every detail happening in a business environment and internal operations. This piece of advice can be a source of anxiety for leaders and managers. Twenty-first-century leadership dynamics have evolved to keep pace. Therefore, organizational leaders need an integrative approach to vision-related leadership that connects four decades' worth of dots and reflects how vision development and realization happen in modern organizations. This book integrates existing and emerging principles in a multidirectional approach to visionary leadership.

Principle 1: The speed of change calls for a multidirectional approach to leadership

Thinking about the future is a team effort—even more so now than in years past. A collective approach is more sustainable and provides a sense of relief if you give yourself permission to involve others in your vision journey. I encourage you to invite more people into the room and involve them earlier in the vision development and realization process. These two actions are easy to say but more difficult to do. This handbook is devoted to teaching leaders and managers how to do visionary leadership all year long—not just in January.

This book emphasizes the shared approach to building an organization and entrepreneurial team. Inviting and involving stakeholders to join your vision journey is just as important as the leadership approach you decide to use. It can make or break your business. As a leader, consider taking a shared approach when developing your vision, strategy, and, especially, your organization. This decision requires a paradigm shift for many leaders and managers.

The recommendation to take a shared approach may contradict everything you have learned and practiced throughout your career. Leadership and organizational theory travel in paradigms—well-packaged frameworks containing theories, laws, general rules, experiments, and supporting evidence (Kuhn, 2012, p. 109). This author does not suggest that excessive participation should be involved in every decision. It is important to note that our favorite leadership styles have strengths and limitations.

Fundamental Book Themes

Nine fundamental themes support the counternarrative of visionary leadership told in this book. I will introduce the themes in the introductory chapter and provide parenthetical chapter references.

After writing the manuscript, I conducted focus groups with subject matter experts and working professionals which produced reoccurring topics and themes. Each theme represents a common thread that reappears throughout the book. These topics have appeared in business literature, though they are somewhat obscure or embedded in the text. Instead of assuming readers know about these principles, I have called them out here. These principles are essential to understanding the backdrop for visionary leadership in the twenty-first century. Several of these principles are used as analogies to illustrate organizational phenomena in relatable ways. The following themes run throughout the book, baked into the content.

- *First Principles Analogies.* Analogies and first principles illustrate how vision forms in organizations. The first principles referenced throughout this book include light switch theory and the accretion of vision, ideas, and knowledge. Both topics are introduced in Chap. 4.
- *Vision as an Innovation.* This book treats a new vision as an innovation. As such, it cannot be successfully imposed on an organization. By nature, a vision should inspire team members to pursue a better future. It is not designed to produce fear-based compliance to a change in direction. Mandating a vision may work in a crisis, but it can only be sustained long term by introducing more sophisticated methods for shared visioning. In short, an imposed vision is not sustainable. According to Jeff Kohles' groundbreaking work on vision integration, an organization can accept or reject a vision. Steve Blank and Bob Dorf assert that startups validate a founder's vision through experimentation. This assertion aligns with Kohles' claim. Therefore, a twenty-first-century visionary leader's job is to shepherd their team in a new direction. In an established organization, the leader must anticipate and manage the conflict between the vision and the status quo. In a new organization, entrepreneurs fight the forces of entropy, disorganization, and pure chaos.
- *Organizational Antibodies: An Immunology Counternarrative*. Antibodies empower company culture to fight anything new, defending against attack using immunity. The antibodies narrative runs counter to the narrative of a new vision for an organization. This section draws from the work of innovation experts Gary Oster, Tony Davila, Marc J. Epstein, and Robert D. Shelton. Organizational cultures act like immune systems with built-in mechanisms to protect the organization from outside threats and other attacks. Specific antibodies preserve the status quo. In doing so, they often snuff out new ideas before they gain traction. When a company's vision is not shared, the culture treats it as an invader and deploys antibodies to destroy it. Threats to a new vision or change must be neutralized so that it may survive. The vision-versus-culture narrative has a locus in Chap. 8. The overall discourse on organizational antibodies serves as the counternarrative

of this work, representing the shadow side of the organization. The counternarrative explains how to preserve organizational health when introducing new ideas.

- *Dynamic Organizations.* A pyramid-shaped org chart is the most common image of an organization's structure. However, organizations are dynamic, and terms like ambidexterity and change resistance imply constant movement. Such motion happens simultaneously within organizations—toward and away from what upper management deems "desired outcomes." This complexity has caused some scholars to think of an organization as a complex adaptive system, or CAS. Others have applied holographic principles to organizations. Let's not forget the Gestalt perspective of an organization as parts that relate to a whole, which has caused foresight scholars like Andy Hines to use terms such as big "V" and small "v" visioning to describe the scope of vision. Keeping the unit of analysis in mind helps when analyzing how a vision is performing in a specific part of the organization or its ecosystem. Twenty-first-century visionary leaders operate in dynamic environments that require an omnidirectional approach to leading their organizations.
- *Business Environment*s *and Ecosystems*. As open systems, organizations share resources with the environment. But how can we think about the external environment when so much attention is paid to the internal? It comes down to the relationship between a business' environment and its ecosystem, which includes its internal operations. This book will unpack the term "VUCA environment" and associated terms: volatility, uncertainty, complexity, and ambiguity (Chap. 1). It will also discuss how VUCA shapes organizational life, often in less obvious ways.
- *Founders' Syndrome.* Twenty-first-century organizations are younger than their predecessors. There are a lot more founder-CEOs running smaller, more nimble organizations. The same entrepreneurial spirit and visionary leadership style needed at the startup phase can be a liability when trying to scale. Often, boards of directors seek to replace the founder with a professional CEO when not viewed as up to the task. This book aims to help founders cross this chasm, increasing their longevity and likelihood of growing with the company. Therefore, founders' syndrome is a recurring theme starting in Chap. 1.
- *Balancing Leader Agency with Self-Organization.* Leadership is active. How a leader shows up and uses their influence determines the success of their organization. When done well, leaders guide the team to new heights and minimize personal frustration. Self-organization is closely related to the CAS principle of emergence. The most confident and effective leaders actively balance a hands-on approach while allowing their teams an appropriate level of autonomy. Twenty-first-century visionary leaders balance leader agency with self-organization (Chap. 2).
- *Rewind.* Organizations often need to take a second loop when learning to anticipate and plan for the future. Ideally, leaders want to start as early as possible to get people on board. Not every company culture allows for this early start. Fortunately, there are things you can do to course-correct and rebound from a

lack of buy-in and commitment. Chapter 5 teaches leaders how to help their organizations rewind to get ahead of the need for adoption.
- *Diffusing Vision and Development*. Vision is ineffective when contained at the top of an organization or within a dusty frame on the wall. Leaders should diffuse a vision into every corner of organizational life for it to perform at scale. The act of development should also radiate in multiple directions through an organization and its immediate ecosystem. Chapter 8 discusses developing people, organizations, structures, and leaders as activities that pair with vision iteration. This coupling increases the uptake of a newly instated preferred future. Diffusing development provides a first step toward institutionalizing the vision into the organization's day-to-day operations.

Case Examples

This book examines the journeys of seven companies iterating their vision and strategic direction while keeping pace with industry evolution. Six companies are well known, and one is not. These companies are Blockbuster, Blackberry, Starbucks, 3M, Meta (Facebook), Alphabet (Google), and Viridian. I chose these companies because they have one major relevant thing in common: each organization completed at least one cycle of vision iteration. While reading through the seven cases, you will think of other case examples. Jot down some notes about those companies to enrich your learning and application of the Vision360 principles. Feel free to share your insights with me at thomas@teaiiano.com. I am always open to discussing case studies relevant to the V360 framework.

There was one distinction among the six well-known cases: the timing of critical decisions to iterate their vision varied when considered in relationship to each other. For example, Facebook's second loop could be considered premature, while Blockbuster's decision against acquiring Netflix coincided with a failure to engage their second loop of vision iteration. Many factors shaped their journeys.

Structure of the Book

Visionary Leadership aims to walk leaders and managers through the vision development and realization process and illustrate how to sustain the conceptualization, creation, adoption, and integration of an organization's vision over time. This book contains eleven chapters, organized into three main sections. In this Part I, we will discuss the expanding paradigm of vision development and realization. Using Gravity Payments as an example, Chap. 1 examines the research questions, "Can an organization learn to see?" and "If so, how do leaders transform a vision into reality over the lifecycle of an organization?" It proposes multiple strategies and perspectives organizations use when learning to see. Chapter 2 explains how every organization moves through the four phases of the Vision360 conceptual model. Chapter

3 discusses ways leaders can find their sweet spot in the Vision360 model to iterate vision, develop followers, and transform the organization.

Part II centers on increasing stakeholder buy-in through shared visioning. Chapter 4 performs a deep dive into vision conception and detects the need for change. The main topics include strategic leadership and foresight and how they interact with the Vision360 paradigm. "Rewind" is the watchword in Chap. 5, where vision adoption, translation, and crystallization take center stage. This chapter reveals the secrets to increasing vision acceptance and implementation. Chapter 6 illustrates what an emergent organization looks like, using unicorn startups and high-growth firms. Early examples of 3M and Starbucks' Vision Journeys hold insights for founders of new ventures. This chapter also touches on the founder-CEO's role and warns about antibodies waiting to snuff out attempts to pursue a shared picture of the preferred future. Chapter 7 explores the tug-of-war between vision creation and emergence. It emphasizes the need to create a shared vision and leave room for the preferred future to emerge through spur-of-the-moment interactions.

Part III discusses ways to facilitate the integration of vision into the organization's daily life. Kohles' concept of vision integration is discussed at length. Chapter 8 escalates the need for organizational transformation to prevent an all-out war between vision and culture. This chapter devotes attention to optimizing organizations for vision emergence and integration through culture transformation and organization development. Without change, key elements such as culture, structure, systems, and leadership style will eat the vision for breakfast. Chapter 9 opens by telling the story of how Starbucks' Frappuccino was born through collective creativity. It also discusses the effect of perfectionist work cultures on creativity, devoting attention to the challenges founder-CEOs face in the autonomy-empowerment paradox. The rest of the chapter is dedicated to a discourse on innovation cultures, empowerment for decision-making, coaching, and vision-friendly practices and behaviors. Chapter 10 opens with the example of Apple and Blackberry to underscore the role of speed and strategic visionary leadership to overcome obstacles and achieve market leadership. This chapter recaps major themes and insights in an abridged yet power-packed narrative of the Vision360 Framework. It closes with actionable items for founders, CEOs, academics, and visionary leaders at multiple points of the journey. The book closes with suggested reading—more commonly known as a list of references☺.

Leaders face the task of re-envisioning their organizations in an external environment marked by compounded volatility, uncertainty, complexity, and ambiguity compared to a decade ago. Middle managers face the task of perpetually re-engaging their team members in the same work they have hired them to do. Everyone is looking for sustainable and automatable solutions. Thus, Vision 360 reconceptualizes vision-related leadership for the twenty-first-century organization and the present-day leader. This book aims to help leaders, organizations, and teams figure out where they are and where they are headed within the scope of vision development and realization.

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1 Can an Organization Learn to See?

To the left, to the left,
Everything you own in the box to the left….

You must not know about me, you must not know about me
I could have another you in a minute
Matter of fact, he'll be here in a minute, baby
You must not know about me, you must not know about me
I can have another you by tomorrow
So don't you ever for a second get to thinking
You're irreplaceable. (Beyonce, 2006)

A handful of companies are well known on the current unicorns list. OpenAI is one of those companies. The board of directors at OpenAI recently ousted co-founder Sam Altman. Within five days, he was reinstated primarily due to his employees' efforts (Metz et al., 2023). This CEO replacement attempt was short-lived because Altman's employees determined he was irreplaceable—at least for the moment. Even though the company is currently valued at $80 Billion, neither the situation, timing, nor reasoning behind the decision seemed to warrant the replacement of Altman's entrepreneurial leadership with that of a professional CEO. OpenAI's coalition of pro-Altman employees saw his value and how to use their power to influence his reinstatement within record time.

I've heard leaders of established businesses say, "My people just don't get it!"—especially when they want to make sweeping and disruptive changes to the company. Even more common is the statement, "Being a leader is a lonely place." A leader should not settle for being a lone visionary. Some leaders use the term chief visionary officer. Lone visionaries should tap into their inner transformational leader and develop visionaries at multiple levels of the organization. That only makes sense. Being a chief visionary implies that other visionaries exist within the company.

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Can an Organization Learn to See?

Imagine if every organization could see with a 360-degree field of vision like a cuttlefish. The cuttlefish's eyes are positioned to see outward on both sides of its head with just eight degrees of overlap. When looking at something straight ahead, the cuttlefish can see with up to 70 degrees of overlap—the overlap measures distance (Le Page, 2020). Neuroscientists are studying cuttlefish to discover how their neurons work together to ensure survival in tropical and coastal waters.

Organizational and Individual Vision

Regardless of scope or content, organizational visioning happens in three general contexts. First, visioning happens in a standalone startup or a new venture in an existing business, causing an emphasis on venture development as opposed to change management and organization development. Second, visioning occurs in an established organization, causing the need for transformational leadership to shift the organization from its current state to a future state. Finally, visioning happens within teams, departments, business units, and projects.

Organizational theorist Richard Daft (2013) defined organizations as four-dimensional "(1) social entities that (2) are goal-directed, (3) are designed as deliberately structured and coordinated activity systems, and (4) are linked to the external environment" (p.12). He continued,

> An organization is not a building or a set of policies and procedures; organizations are made up of people and their relationships with one another. An organization exists when people interact with one another to perform essential functions that help attain goals. An organization is a means to an end. (Daft, 2013, p. 12)

Daft's definition centers on people—the human actors—not the systems and processes that make up an organization. Greenwood and Miller (2010) discuss organizations as a collective made up of human beings and driven by the relationships that form when they interact with the notion of organizations as a system of systems to coordinate activity for internal integration.

Vision development happens differently in various contexts. Infants learn to recognize images. Primary school children learn to recognize letters and put them together to form words. As a collection of individuals organized for a purpose, an organization uses its vision to make sense of the world around it. Organizational vision is different from biological vision. Business literature defines *vision* in the context of a desired future state. Moreover, vision is often associated with organizational leadership (Winston & Patterson, 2006), especially strategic (Ireland & Hitt, 1999), transformational (Sosik & Jung, 2018), and visionary leadership (Nanus, 1992; Van Knippenberg & Stam, 2014). Organizational vision adds two other distinctions to set it apart from biological vision. First, organizational vision incorporates the element of collective identity—who a group of people aspire to become.

Second, an organization pursues its vision within a timeframe that leaders project onto the long-term horizon. Members of established and entrepreneurial firms develop a vision to detect trends in the business environment, anticipate the future, and take action in the present. Their preferred future can sometimes contend with past experiences that have shaped the organization's current identity. Thus, the group tends to choose the future they want and work toward realizing it while anticipating alternative future scenarios.

So, I ask, "Can an organization learn to see?" Some may say, "Yes and no—it depends on the situation." This book hypothesizes that organizations can learn to see if leaders involve stakeholders earlier in the process. The answer leads to the principle of this chapter. The rest of this chapter will demonstrate what it takes to develop such an organization.

Principle 2:
Twenty-first-century visionary leaders create visionary organizations.

On Visionary Organizations

An organization can be visionary in one era, but if it fails to keep pace with the future of its industry, it can become extinct due to a lack of foresight and innovation. Learning to detect and neutralize potential threats is critical for a company's survival. Several well-known companies illustrate the variation in how organizations learn to see throughout their lifecycles. Enduring organizations improved their ability to anticipate threats and neutralize their negative impact. Unfortunately, not every organization can maintain visionary abilities due to blind spots. These case studies will provide insight into how organizations learn to see.

Seeing is a choice. Teams that do it well tend to thrive. Those that do it poorly get eaten alive by the competition. Consider the journey of Blockbuster. The saga of Blockbuster shows how organizations can choose *not* to see. This former market dominator's vision was clouded by a fee-based business model, which proved viable until the market shifted toward online streaming. Blockbuster's story shows companies can gradually lose the visual acuity required to remain an industry giant despite seeing effectively at the beginning of their journey. The digital transformation journey of 3M lends insights into what could have helped Blockbuster to endure. Blackberry developed a product-focused tunnel vision after pioneering the smartphone industry. The lack of peripheral vision allowed Apple to take the lead and dominate the market. Starbucks revolutionized the coffee industry and popularized itself as a "Third Place" for its customers. Howard Schultz reprised his role as chief executive in 2008 and again in 2022 to ensure Starbucks does not lose its way while navigating an increasingly crowded marketplace. Tesla saw the need to employ adoption strategies as it disrupted the automotive industry with electric vehicles. Popularizing EVs required increased adoption of a related innovation: electric energy production. During the COVID pandemic of 2020, CEOs of high-growth firms (HGFs) stepped up to the plate. They led their already successful organizations to become more visionary by searching for better ways to serve their customer base. Former Gravity Payments CEO Dan Price shared on social media how he led his company to see ways to serve its customer base better. Before posting on YouTube, Price shared his story at Hawke Media's quarantine conference—a virtual event hosted by Erik Huberman and his team at the advent of the lockdowns. The Hawke brand has expanded to other market spaces and taken the branded house approach to its family of businesses.

Alcoa, Facebook, and Google have transformed their organizational structures to focus on their existing business while exploring new opportunities. Alcoa used foresight to reorganize and adapt to the volatile commodities industry. 3M learned to see and pivot early in its life cycle. Patterns of innovation and creativity are well worn into 3M's culture. Facebook's transition to Meta Platforms reflects the ability of a social media platform pioneer to see new opportunities early—some dare to say they saw it too early. Google made a similar transition for slightly different reasons. This pioneer of online searches saw an opportunity to put their extra cash to good use in the tech startup ecosystem. In a 2015 restructuring, Google became a subsidiary of Alphabet, their new parent company. The saying "every round goes higher" implies a link between vision and the faith to see around corners. A visionary journey is one where every higher level helps the organization to see further. If leaders and followers fail to take a leap of faith, they cannot climb higher enough to see what's out on the horizon.

Spend Time Just Seeing

Have you ever wondered how Google Maps (Fig. 1.1) produces pictures of cities and landscapes at increasing rates? Google launched its desktop version of Maps on February 8, 2005, with a mission to "get people from point A to point B" (Reid, 2020). In the past two decades, Google Maps has grown into the leading mobile navigation application, used monthly by over one billion people. The app is famous for its satellite views of the earth, made possible by a 2004 acquisition of Keyhole, Inc., along with its Earth Viewer application (Press, 2016). Today, we know this technology as Google Earth. With the introduction of Street View in May 2007, Google began attaching cameras to almost anything in motion, allowing it to capture more than 10 million miles (Reid). Google Maps learned to see.

Can you imagine if the Google Maps team set out to see the globe without first having a larger vision? Could you picture how long it would have taken for Google to see without involving others? The acquisition of Keyhole and the proper integration of the Earth Viewer technology enabled the success of Google Maps. I doubt that Sergey Brin and Larry Page were alone at the negotiation table if they were in attendance at all. Street View's success was undoubtedly accelerated by increasing internet speeds and the widespread adoption of social media. What's the point?

As an organization, it is impossible—even for the founder—to see accurately in isolation. Many executives and investors view their organizations using the views afforded by Earth Viewer mode. Street View represents how employees and

Fig. 1.1 How Google Maps learns to see

managers navigate the business environment and bring intel into the company. A 30,000-foot perspective gives CEOs an excellent view of the strategic direction and priorities, allowing them to check for alignment. This view also lacks the detail needed to push the vision forward. By sharing the street view perspectives through storytelling and reporting, executives gain a more granular picture of how the organization affects the lives of its customer base.

For the better part of two decades, I have been honing a theory of vision development. One premise of the theory is that vision development in organizations is more about seeing than visioning. Vision is different from seeing, and seeing is different from the light that enables one to see. Light is the epiphany or the pivotal "aha!" moment where a leader or follower begins the process of learning to see in a new way—a moment of truth. Similarly, sight is a prerequisite for visioning. These concepts fit together in Table 1.1. Seeing is an activity humans have in common with animals, lesser-developed organisms, and even computers. However, visioning is arguably an activity enjoyed by higher forms of life. The ability to see—using the natural or mind's eye— is a prerequisite for visioning.

From a physical sciences perspective, *vision* is synonymous with *seeing* something (Hughes et al., 2014). The act of seeing changes when imported into an organizational context. Seeing is a team sport and a prerequisite for visioning.

Once an organization has seen "the light" or had a collective "aha!" moment, a vision search will soon follow and can result in ideas for a new project, product,

Table 1.1 Words associated with seeing in organizations

Words associated with seeing in organizations			
What synonyms and additional words are associated with or closely related to the organizational activity of seeing?	Foresight Perception Perspective Periphery Envisioning Seeing around corners Awareness Purview Dreaming	Visioning Perceiving Imagining Peripheral vision Visualizing Leapfrogging the competition Observing Preferred future Sensing	Futuring Detecting Anticipating Focal vision The way forward Purpose Representing Recognizing Direction
What concepts are associated with unseen phenomena in organizations?	Assumptions Values Beliefs Culture Invisible hand		
What shapes the way organizations see things?	Mental models and cognitive maps Level of awareness Corporate "DNA" (Morgan, 2006) Ability to balance peripheral and focal vision (i.e., ambidexterity)		
How can organizations see together?	Strategically Prophetically, in new ways Differently and better than if looking alone With a sharper perception of new opportunities Beyond the obvious Further than the immediate future Around obstacles and roadblocks At varying levels of granularity Recognizing opportunities like children recognize letters of the alphabet		
What can organizations see when looking together?	A more complete picture New opportunities and threats on the horizon How to best navigate a strategic landscape Patterns, themes, and perking information Relationships		

service, or process. It could also lead to a desire to catalyze change in various areas (e.g., serving customers in a new way), even if the final result is uncertain. In organizations, a vision search follows the light switch (see Chap. 3 for more on "vision search").

Perception and Perspective

The transformation of modern-day Dubai is one of the most ambitious and visionary city planning initiatives. Modern-day Dubai represents a visionary organization. Sheikh Rashid bin Saeed Al Maktoum is the visionary leader often credited with

Dubai's transformation from a desert trading port to a cosmopolitan metropolis. He envisioned the type of twenty-first-century city Dubai could become and allocated resources to pursue that preferred future.

A stakeholder's perception and perspective determine what they see. In addition to visualization, the language of vision in business literature also includes perception and perspective. Michalko (2006) suggests that the main problem in organizations is related to stakeholder perception—which is different from the construct of vision and the associated process. Business literature contains varying perceptions of organizations. According to Michalko (2006), perception is key to seeing things differently through new lenses. To this end, he described 39 creative-thinking techniques that leaders could use to change how they perceive organizational situations, train team members to see beyond the obvious, and expand their consciousness and capacity for idea generation (Michalko, 2006). Future vision provides direction and inspiration for doing something different, especially for organizational members who are open to new ideas and seeing in new ways. Kohles (2001) advised treating vision as an innovation, and Rogers (2003) emphasized that the prerequisite to adoption is "a decision to make full use of an innovation as the best course of action available" (p.21). Visionary leaders inspire stakeholders to perceive the vision as the most logical pathway to the future.

Learning to See in Complex Systems

The holographic approach provides an alternative to bureaucracy and hierarchical organization. In considering whether organizations can learn to learn, Morgan (2006) proposed five principles of holographic design. In a departure from business as usual, holographic principles of organization center on growing big by growing small. In the true spirit of emergence and complex adaptive systems, the holographic organization approach (Fig. 1.2) holds that "the properties of the whole emerge from the properties of the parts" (Palmberg, 2009, p. 486). Organizations learn to see differently in a complex adaptive system. Collective vision springs from curiosity and subsequent examination of what's happening in the external environment (Burke, 2018). Organizations learn to see what is happening around them using different forms of sight, including, but not limited to, foresight, insight, hindsight, and peripheral vision.

Containers

Learning to see involves identifying containers where vision is likely to emerge, either by default or design. Olson and Eoyang (2001) proposed a container

> sets the bounds for the self-organizing system. It defines the 'self' that organizes. The container may be physical (for example, geographic location), organizational (for example, department), or conceptual (for example, identity, purpose, or procedures). (p.11)

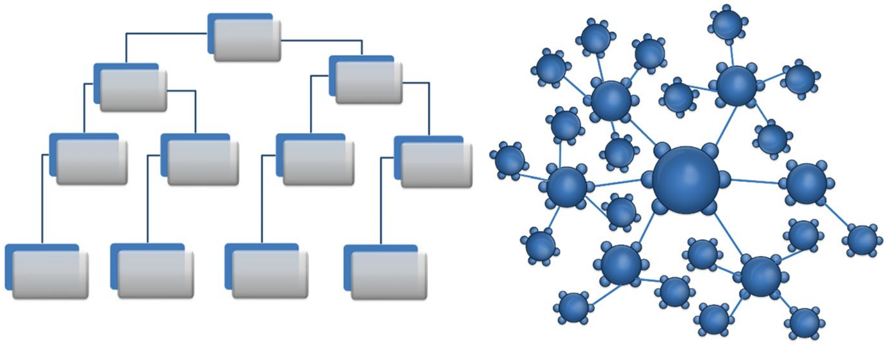

Fig. 1.2 Comparing hierarchy with holography

Some containers, such as whole group processes, are created. Others happen spontaneously (e.g., at the water cooler) or in a hybrid fashion. A full list of containers is included in Chap. 7. The point is that vision emerges in these settings through interchanges between stakeholders, which happens more easily when organizational members know how to see.

Case Example: Walmart

Visioning is a pre-launch activity during large-scale change (Burke, 2018). Vision is not about managing strategy, but organizations do learn to see strategically. By co-creating a strategic vision, organizations learn to see a preferred picture of the future. However, a new, emerging, or evolving vision implies the need for multi-level change, which can start with "small innovation [that] trains your eyes to notice invisible risks and new opportunities" (Zhexembayeva, 2016, p. 309). Walmart's experiment with right-size packaging provides a helpful example. In 2005, Walmart conducted a sustainability experiment to "right-size" the packaging of children's toys, saving the retail behemoth 3425 tons of corrugated paper materials, 5190 harvested trees, and over $3,500,000 in transportation costs in one year (Zhexembayeva).

While vision may be introduced for an organization to move toward its full potential, those who are comfortable with how things are may perceive it as a threat. This view is especially relevant when leaders present it as a foreign object imposed from above, not a shared vision co-created from within. Moreover, organizational antibodies often attack a big idea when stakeholders perceive it as a threat to the organization or, more specifically, to the status quo and existing culture.

Counternarrative: Founders' Syndrome

It is common for founders of small-to-medium enterprises (SMEs) to lead with an entrepreneurial style. Like jazz-band conductors, entrepreneurial leaders nurture innovative, creative, and adaptive environments using a flexible and fluid approach (Scarborough, 2014). Also, many startups revolve around the personality of their founder(s) and the culture forged by the founding team (Schein, 2017). If successful, startups reach a decision point concerning the most effective leadership style for future growth. The continued development of a mature business often demands more steadiness and consistency than early-stage entrepreneurial leadership has to offer. Herein lies the conundrum or paradox: the organization can outgrow its founder's professional capabilities. Entering this life stage makes a company susceptible to founder's syndrome. Such was not the case with OpenAI.

Founders' syndrome sets in when an organization outgrows its founder's personality, capabilities, management approach, and leadership style (Boustani & Boustani, 2017; Ceaser, 2018; "Founder's syndrome," 2015; Gorondutse et al., 2018; Sorenson, 2004). Also known as "founderitis," founders' syndrome is defined as:

> A *system* of difficulties faced by an organization as a result of one or more of its founders retaining *disproportionate influence* on the organization….*especially* in the cases of organizations that have grown much larger than when the founder first instituted them, there may not be a well-considered management hierarchy in place, or one of the founders may routinely ignore the hierarchy and its norms. Decision-making processes may seem opaque even to other members of upper management, and key employees and board members may have been selected for their support or connection to a founder and so *serve the founder's interest rather than the organization's*. ("Founder's syndrome," 2015), emphasis added

On the one hand, an organization with founder's syndrome has taken on a life of its own. On the other hand, the next stage of development is being stifled by an early-stage culture shaped by the visionary entrepreneur and founding team.

At this point, it is important to clarify two things. First, the organization develops founder's syndrome; the founder does not. Nonprofit law professor and author Elizabeth Schmidt (2013) warned against villainizing founders for their dedication to the original vision, inability to delegate, failure to orchestrate a smooth transition to new leadership, or even using the organization to serve their egos. These symptoms can often be mistaken for a clinical or psychological issue and result in stakeholders blaming the founder, which ultimately damages their reputation and can result in a premature withdrawal of the founder's influence before their vision is ingrained in the organization (Schmidt, 2013). Second, during this period, the nature of the organization changes from its original purpose of serving the founders' interests and motivations to serving the interests of the organization's stakeholder groups. This transition happens without much fanfare.

Practical Advice for Visionary Leaders

Founders begin their journey in a dominant position due to the critical nature of their vision and capabilities to early successes. Founders have the vision for the organization, which gets tested by the management team and early joiners. An entrepreneur's role evolves along the organizational life cycle and fast-growing startups reach a point where the organization outgrows the founders' vision. As startup organizations mature, founders shift to a more peripheral role with limited decision-making power (Wasserman, 2017). This situation sparks the question, *what happens when organizational dynamics exceed the founders' purview*? The following seven steps are meant to provide a crash course for leaders who are teaching their organizations how to see.

1. Involve more stakeholders
2. Lean into VUCA
3. Frame the future
4. Flip the switch
5. Create lines of sight
6. Encourage creative thinking
7. Turn the tide

Step 1: Involve More Stakeholders

On several occasions over the past 15 years, I set out to deliver a highly structured workshop or training requested by a small-to-medium-sized organization. During the sessions, groups would naturally gravitate toward a whole group discovery session as they had not fully identified their problem and held diverging views on the same situation. After a few years, the group discovery approach arose as a consistent solution to a prevalent client problem.

The need for group discovery reflects a trend where groups gravitate toward collective approaches and away from situations where one person provides most of the answers—even if that individual happens to be a consultant.

Due to its complex nature, visioning and change require a collective approach—it's "all hands, on deck!" Until the 1990s, small group and individual interventions dominated the practice of organization development and change (Bunker & Alban, 2002/2009). In response to the accelerating pace of change, larger organizations began to adopt large-system intervention methods to work with the whole system at one time, creating better connectivity and a more congruent fit between components (Bunker & Alban, 2002/2009; Olson & Eoyang, 2001). Large-group methods share four characteristics as they (1) involve a variety of stakeholders including leaders, line workers, clients, and community members, (2) encourage multiple perspectives and participant interactivity, (3) give all participants a voice in shaping the vision, and (4) emphasize common ground (O'Connell et al., 2011). Larger organizations have found a way to co-create in the face of constraints by employing a corporate visioning process (Srinivasan, 2014). Larger organizations adopt whole group transformation and collective visioning more readily, but smaller firms also use this strategy. Chapter 5 explains how Starbucks leveraged the power of the whole group process to reinvent itself.

The human phenomenon of seeing holds insights for collective sight and visioning. Although seeing and visioning are activities that humans typically undertake individually, both activities can happen in groups. Shared visioning, however, is solely a collective activity. It happens in organizations and groups. Shared vision represents an outcome, but shared vision*ing* is a process. Kouzes and Posner (2017) explained the need for organizations to engage in this process:

> Nobody likes being told what to do, no matter how right it might be. People want to be a part of the vision development process. They want to walk alongside their leaders. They want to dream with them, invent with them, and be involved in creating their futures. (p.108)

Team members will not work as enthusiastically toward a vision they did not help create. Ideally, leaders would always collaborate with stakeholders to co-create a future direction in a perfect world devoid of time crunches, budgetary constraints, and a relative need for control.

Step 2: Lean into VUCA

I began assembling the insights for this book when the COVID-19 pandemic was in full swing. National governments had managed to stave off a global pandemic for more than 100 years and most people had never witnessed such an upheaval in our global economic, social, organizational, and political systems. The events of the post-COVID era resemble tectonic plates at the San Andreas Fault grinding past each other after years of increasing friction. Each day, leaders and employees alike feel the rumblings of disruptive change underfoot while navigating through the turbulence of everyday life. VUCA has reached an all-time high.

In response, there has been a resurging interest in visioning. This is expected as vision is necessary to develop the agility required to counteract volatility, which has skyrocketed since the onset of the COVID-19 pandemic. Long-term trends such as flexible work arrangements, rampant attrition, effects of globalization, political polarization, and demands for social justice have contributed to a renewed interest in visioning and visionary leadership.

Change has accelerated and has no intention of slowing down. Welcome to the VUCA environment. The chaos of VUCA—volatility, uncertainty, complexity, and ambiguity—constantly challenges the order of the status quo. Organizations are adapting visioning practices to the VUCA environment.

Navigating Organizational Life under VUCA Conditions

Since the beginning of time leaders from all walks of life have adapted to changes in the external environment. They do this while shaping the dynamics within their organizations. Visionary leaders like founder CEOs now have an added responsibility. They have to navigate the same organization that they created—their brainchild—through situations that have become more complex over time. Those who study leadership and organizational dynamics have expanded their theories to accommodate this new situation. During the 1960s for instance scholars began to explore the organization as a system. With interconnected parts that worked together while exchanging resources with its surrounding environment. Startups are a perfect example of this open systems approach. Many founders and CEOs can speak to the influence of competitors, funding sources, latent customer desires, and other external factors on their budding organizations.

After the dot com bubble burst, leaders realized change itself was changing. Change was speeding up—accelerating much faster than many leaders and organizations could keep pace with. No doubt, more than a handful of CEOs, company presidents, and heads of state detected the need to understand what was happening. At such times, folks turn to academia. So did they.

The terms associated with this phenomenon became popular after the business world began rethinking approaches to leadership, organization change, and strategic planning. A popular idea on the internet is that the term VUCA originates from Warren Bennis and Burt Nanus' book "Leaders: Strategies for Taking Charge." I cannot confirm the actual term exists there. The best ideas are captured and wrapped in something memorable. Whether it is the lyrics of a song or the operating principles of a theory. It needs to be something people can remember. That's exactly what a social scientist and futurist by the name of Bob Johansen did. He popularized the term future generals were using at the US Army War College in Carlisle, Pennsylvania. This term was VUCA.

Four Components of VUCA

A VUCA context is an environment characterized by volatility, uncertainty, complexity, and ambiguity. Whether you have heard the term used on repeat or sparingly, it is tempting to treat VUCA as a whole. Actually, each component of VUCA functions as its own construct (see Table 1.2). In that spirit, let's take these terms one by one using a framework created by Nathan Bennett and G. James Lemoine.

Volatility is characterized by unexpected and unstable challenges that may last for an indefinite amount of time. These challenges are not hard to understand, and knowledge about the topic is often available. A wide range of commodities are subject to surprises in the financial markets. Oil, coffee beans, and rice are just a few of the items whose price volatility affect our personal lives, investment account balances, and amounts of on-hand cash. The prices of such commodities can directly impact businesses through budgeting and finance. An increase in the prices of fuel can also indirectly affect membership-based and religious organizations that depend on donations. For more information on price volatility, refer to "What Is Price Volatility" by the Energy Information Administration. *Uncertainty* occurs when an event's general cause and effect are known, but a lack of information makes the future hard to predict. Disruptive organizational change is full of uncertainty. A host of factors can influence the final outcome, and things do not always go as planned.

Table 1.2 Leaning into VUCA

	Volatility	Uncertainty	Complexity	Ambiguity
Nature of situation	Unexpected and unstable challenges	General cause and effect are known	Many interconnected parts and variables	The situation has no precedent and obscure cause/effect relationships
Ease of understanding	High	Medium-high	Medium-low	Low
State of information/knowledge	Often available	Lacking information	Large amounts/high volume of info available	Difficult to determine what info is needed or missing
Main challenges	Indefinite timeframe	Change is possible but not automatic and may be influenced by other variables	Nature and volume make information difficult to process	Unknown unknowns prevail
Examples	Commodity pricing; market volatility	Anti-terrorism initiatives; Brexit; great recession of 2008; Nokia's failure to innovate; flexible work arrangements	Entering foreign markets; war on drugs	Transitioning from print to digital media; starting a business
Bennett & Lemoine (2014) recommend	Agility	Information	Restructuring organization design	Experimentation
Johansen (2007) recommends	Vision	Understanding	Clarity	Agility

Sources: Bennett and Lemoine (2014), Johansen (2007)

The introduction of new technology, a shift in customer demand, or a manager's refusal to do things differently can make it impossible to predict the future accurately. Change is possible but not automatic and may be influenced by other variables.

Complexity describes a situation with "many interconnected parts and variables" (Bennett & Lemoine, 2014). Large amounts of information are usually available on the topic, but the nature and volume of the data can make it difficult to process. Because the business environment is so complex, Hughes et al. (2014, p. 3) called for "MORE people, not fewer, in organizations to be engaged in strategic leadership." Involving so many people at one time can transfer the complexity of VUCA into the internal organization. To avoid this problem, leaders should hire experienced facilitators, consultants, and outside experts to lead the group. As organizations grow, leaders can address critical elements of complexity in the environment with more intricate internal configurations (Burton et al., 2015). Building such solutions helps leaders gain the clarity needed for more effective decision-making.

Ambiguity makes cause-and-effect relationships more obscure. When a situation is ambiguous, it has no precedent and poses unknown unknowns. Ambiguous situations make it difficult for managers to determine what information is missing or even needed. When Garrett Camp and Travis Kalanick founded UberCab in 2009, rideshare did not exist. At best, the taxicab industry provided an example of how rides were hailed. Because the co-founders were exploring an opportunity in a new territory, they tested the concept in New York with only three cars before shortening the name to Uber and officially launching in May 2010 in San Francisco (Blystone et al., 2023). Such experiments provide new business owners with a way to reduce unknowns, identify causes and effects, and ultimately de-risk new ventures.

Turning the Tide and Leaning into VUCA

Visionary leaders rise to the challenge of turning threats into opportunities. Bob Johansen called this “dilemma flipping.” He argued the ultimate dilemma is “to take the VUCA world and change it from a threatening thing, which it certainly is, into a world that is not only threatening but also laden with opportunity” (Euchner, 2013, p. 10). Johansen proposed each element of VUCA yields to its positive counterpart and each counterpart helps leaders overcome chaos encountered from the outside (Johansen, 2007). Due to the associated nuances, each component warrants its own distinct and unique response (Bennett & Lemoine, 2014). Exhibit I.1 outlines Bennett and Lemoine’s (2014) definition of VUCA along with examples and recommendations for addressing it. Also included are Johansen’s recommendations for addressing VUCA conditions. So, where does vision enter the picture?

Mitigating VUCA’s effects has required more of an all-hands-on-deck approach than activities such as strategy development and implementation. In response, successful companies use well-managed group processes. With its power to motivate groups and render leaders more effective, visioning became a popular topic for whole group transformation sessions. Because of its link to futures studies, experts use vision to connect the shifts in the business environment to much needed changes within the organization. Vision helped leaders and their companies to think bigger. It helped managers to connect the past with the future. Visioning provided leaders and their teams with a response to the question “so, what do we do now?” Visionary leadership approaches of the late twentieth century prevented businesses from going belly-up.

The most astute organizations adapt their visioning practices to the VUCA environment. New and existing organizations can draw from the wisdom of customers, employees, suppliers, and other groups with a stake in their success. By inviting more people into the visioning process, organizations learn to see collectively and not just as individual people. The organization starts to see as a unit. They increase speed, clarity, and agility by working together to paint a clear picture.

Employees who cannot see beyond the status quo will meet unique difficulties. Short-sighted managers will find it difficult to get ahead of the game. Who can plan for future scenarios while constantly playing catch up? A myopic view of the present—or even projecting the past onto the present, will not yield insights in time for top management to reposition a company for future growth. Johansen advised, “[in]

a VUCA world, you need to be very clear about where you're going, but very flexible about how you get there" (Euchner, 2013, p. 11). Although this book will touch on understanding, clarity, and agility, it aims to expound on vision—the first positive counterpart of VUCA. When envisioning a preferred future, organizational and team leaders alike gain an understanding and clarity of the business environment. They experience a moment of truth. They. Get. It. Something about their organization needs to change. This is where visionary leadership starts to break down.

Practice Leverage the complexity factor (of VUCA) for visionary leadership.

Vision is where the external environment meets the internal organization—where leaders and organizations figure out what to do over the long term to respond to changes and trends in the business environment. Foresight looks outside the organization for answers. As a part of foresight, visioning is the point in the process where stakeholders have seen what's happening on the outside and are ready to answer the question, "so what can we do about it?" Vision begins the process of bringing the future into the present.

Behavior Make space for self-organization and emergence within the visionary leadership process.

Leaders cannot know everything or be everywhere at one time. And despite sometimes thinking so, leaders are not all powerful—not even in their own organizations. That said, it is important for leaders to enlarge their visionary leadership process to include creative responses to emerging situations. And yes, this does mean developing people (which requires LOTS of patience) and giving people the ability to learn from their mistakes. I'm not talking about blind trust or giving people unbridled freedom. You will give direction. You will communicate your expectations. You will provide accountability and checkpoints. But you will also give them the freedom to explore uncharted territory, to learn valuable lessons, and to achieve new goals.

Step 3: Frame the Future

At least four categories of factors are involved in an organization learning how to see: time, scope, context, and content factors. These factors help teams to ground the future in present realities. Doing so makes the future seem less distant and more relevant to solve present challenges.

Time

The vision is communicated over time using a long view. According to the work of Peter Zimbardo concerning temporal orientation, the *time* factor determines the point in the future under observation or analysis (i.e., when) (RSA, 2010a, b). Some members see the organization through microscopic lenses and shorter time horizons than traditional visionary leaders—examining dynamics in detail at very close range. Past orientation suggests that past experiences and prior relationships with followers influence a leader's present behavior (Thoms & Greenberger, 1995). Present orientation means a leader "reacts and responds to situations in the present as they occur and that expected outcomes are short term (i.e., relatively in the present) rather than long term" (Thoms & Greenberger, 1995, p. 273). Others view the firm through telescopic lenses and over longer distances and time horizons. Future orientation reflects "a leader's dominant behavior having a direct, purposeful bearing on the future" (Thoms & Greenberger, 1995, pp. 273–274). Foresight helps companies see beyond tomorrow and along longer time horizons ranging from five to thirty years.

Vision, Desired Organizational Outcomes, and Time Horizons

The future orientation of vision makes looking at time horizons essential. Quinn and Rohrbaugh (1983) proposed a spatial model of organizational effectiveness. Their model included three dimensions: organizational focus (x-axis), preferences for structure (y-axis), and a means-ends continuum to reflect the degree of proximity to desired organizational outcomes (depth or distality axis). The time orientation associated with these factors is similar to instrumental and terminal values. According to Hultman and Gellerman (2002), terminal values serve an organization's purpose and the basis for vision and mission. Instrumental values function as standards to fulfill core terminal values and reflect preferred behaviors (Quinn & Rohrbaugh, 1983). Instrumental values can be equated with a means to an end and are closer to the present than terminal values, which are more distant in time.

Along these lines, studies have examined a range of distal and proximal outcomes of organizational factors and delineated the differences between both types. According to Brown and Warren (2009), distal goals are longer-term outcome goals and proximal goals are more short-term, benchmark goals. Distal organizational outcomes "define the ultimate level of performance to be achieved," and proximal organizational outcomes "define preliminary levels of performance to be achieved while working toward the distal goal" (Weldon & Yun, 2000, p. 336). In examining project creativity in international marketing teams, Suh and Badrinarayanan (2014) identified proximal factors as impacting "the everyday functioning of the team," and distal factors as being "associated with the team's organizations that are relatively remote to the everyday functioning of the team" (p.283). In discussing vision-based coaching for leader development, Passarelli (2015) argued, "a personal vision is distinct from goals [as] it is more aspirational, holistic, and distal than goals, which tend to be more instrumental, targeted, and proximal" (p.2). Vision undoubtedly interfaces with more distal goals and values, with which proximal goals must align.

Studies on visionary leadership have operationalized independent, moderator, and outcome variables (Van Knippenberg & Stam, 2014). Firms use a range of variables to pursue distal outcomes such as organizational performance, organizational effectiveness, and leadership effectiveness. Similarly, studies on vision-based leadership have studied vision content, attributes, realization factors, intervening factors, and performance outcomes. Select studies on both visionary and vision-based leadership converge in that they both examine vision content and characteristics, vision communication, follower factors, leader factors, and performance outcomes. The author has examined factors related to distal organizational outcomes to expand the concept of collective visioning beyond the confines of visionary leadership and vision development (i.e., creation of a vision statement). The researcher has also examined proximal organizational outcomes that align with and support long-term results.

Scope

Visions come in all shapes and sizes, and a stakeholder's position on issues and their role within the company determine their perspective. Scoping helps frame future vision by placing limits around what Burton et al. (2015) called the specific "unit of analysis," thus differentiating the particular unit of analysis from the external environment. Thus, differentiating the scope of vision minimizes confusion, especially when communicating to different stakeholder groups with specific purviews. Hines (2021) outlined the difference in vision scope using two terms: "big 'V' visioning" and "small 'v' visioning" (Table 1.3). *Big 'V' visioning* concerns the organization's future. It is synonymous with strategic visioning, organizational visioning, shared vision, organizational transformation, and setting strategic direction. Stand-alone startups fall into this category. Big "V" visioning is also a part of strategic leadership, and any type of organizational-level visioning in response to needed transformation falls under big "V" visioning. For example, Heim (2018) defined a business transformation as "the active alignment of corporate strategies, processes, technologies, people and partners *under a meaningful vision* while fostering the attainment of innovative business goals and objectives on an iterative and continuous basis" (p.320, emphasis added). Such disruptive change and the corresponding alignment of organizational activity call for big "V" visioning. In contrast, s*mall "v" visioning* concerns "the implications of various-sized projects for a portion of the organization" (Hines, 2021). Examples include innovation, project management, change management, a startup within an existing business. Such projects support the implementation of a broader vision for change. Each type of project differs in scope, purpose, and the stage of the process where it is deployed. Small "v" visioning

Table 1.3 Comparing the scope of big "V" and small "v" visioning

	Big "V" visioning	*Small "v" visioning*
Description	"Concerns the future of the organization"	"About implications of a project for usually a part of the organization"
Types of vision used	Peripheral and focal	Focal vision
Application	Business transformation	Strategy execution and implementation
Frequency	Less often	More often
Time horizon	Longer time	Shorter time
Other names	Strategic vision, strategic direction	Innovation, project management, change management, startup (within an existing business)

Source: Terms "Big 'V' visioning" and "Small 'v' visioning" and descriptions derive from Hines (2021) happens more often than big "V" visioning; however, big "V" visioning touches every part of the organization and has wide-reaching effects.

Context

Contextual factors, including occurrences on the strategic landscape and within the industry, are essential to consider. The internal context yields vital information regarding the current state of company culture, strategy, operations, and human resources. An organization's competing values can also help frame the future during vision conception. The difference between a firm's actual and aspirational values reveals the gap between who it is now and who it desires to become. The size of the chasm (i.e., the distance between one set of values and the other) may be uncertain and need further examination. Regardless, current realities within and outside of the company shape its identity.

Content

As a vision is conceived, its *content* reveals what leaders, managers, and team members see, what gets their attention, and what they deem significant. Therefore, a vision has to be more than internally focused (Fig. 1.3). The content reveals how the organization interfaces with its environment. The content included in a vision reflects how a business wants to strategically position itself (Kantabutra, 2008). Vision content varies according to the organization's industry, life stage (e.g., entrepreneurial vision or innovation vision), type of business, and competitive environment (Kantabutra, 2008). Products, services, markets, organizations, and ideals are candidates for the strategic content of a vision and can serve as the central image driving it (Kantabutra, 2008; Westley & Mintzberg, 1989). The scope of vision and contextual factors influence content. For example, the vision for the marketing

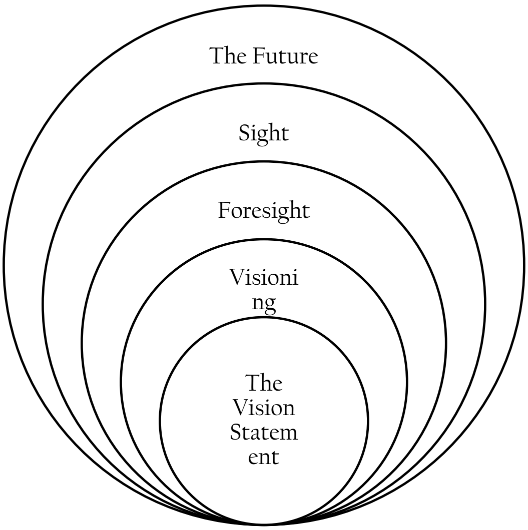

Fig. 1.3 Locating the vision statement within future thinking

department of a high-growth firm would differ significantly from the preferred future of a multinational corporation.

An organization's size and life-stage affect stakeholder perceptions. These factors also contribute to how it learns to see, what it focuses on, and what it relegates to the periphery. Bellerby (2017) posited that organizations progress through four life cycle phases—startup, basic management, mature business, and corporate—connected by three transitional periods. Likewise, Greiner (1998) proposed that organizations move through five phases of development: creativity, direction, delegation, coordination, and collaboration. Greiner suggested "[t]he critical task for management in each revolutionary period is to find a new set of organizational practices that will become the basis for managing the next period of evolutionary growth" (p.58). As organizations evolve, critical success factors often change and contradict previous life stages (Littunen & Niittykangas, 2010). The irony is that today's solution can become tomorrow's problem.

Smaller organizations tend to be more nimble or agile, and larger organizations take more time and effort to change direction. In a study of 137 software executives, Latham (2009) discovered that large companies responded to recessionary conditions with cost-cutting, but startups produced revenue-generating strategies (e.g., market segmentation tactics) to adapt to market conditions. A business' size and life stage may also affect how innovation is perceived. In a study of 12,771 French startups with less than ten employees, Boyer and Blazy (2014) found that innovation negatively impacted the survival of micro-enterprises. Several factors, including business context, size, rate of industry growth, and life stage, shape which options they see and how they intend to navigate toward those options.

Learning to see = Vision emergence + Vision-related Leadership

Focal and Peripheral Vision

Two human concepts relate to organizational seeing: focal vision and peripheral vision. Focal vision is the central or narrow vision that helps humans concentrate on core tasks. In contrast, peripheral vision is a fuzzy zone just outside the focus area.

According to Day and Schoemaker (2006), peripheral vision is an organization's ability to detect, receive, interpret, and act on weak signals in one's surrounding environment (i.e., the periphery). Peripheral vision enables an organization to meet needs within its changing environment and identify impending threats or opportunities at the edge of its cone of vision. It gives an organization the ability to see around corners. Combining focal and peripheral vision creates a mutually dependent process called "ambidexterity vision" (Cegarra-Navarro et al., 2016). Ambidextrous vision allows organizations to "maintain a strategic balance between *focal* and *peripheral* vision" (Schoemaker, 2019, p. 3). The ability to strike a balance in its visual field enables organizations to anticipate and address environmental signals at a speed which preserves a company's momentum while allowing it to tweak its direction every so slightly.

Learning to see with a full range of vision empowers a firm to see around corners, meet shifting needs within the business environment, and identify looming threats and potential opportunities at the edge of its cone of vision. A company with peripheral vision understands "where to look, how to look, what the signals mean, when to turn one's head to look in a new direction, and how to act on these ambiguous signals" (Day & Schoemaker, 2006, p. 207). Such a firm can anticipate market changes before its competitors—a critical skill in turbulent environments (Schoemaker et al., 2018). Leaders should look beyond current boundaries for game-changing information while building wide networks to assist in scanning the horizon (Schoemaker et al., 2018). By crossing the boundary of organizational vision, leaders gain access to vital knowledge to swiftly reconfigure the organization to learn from and adapt to conditions in the external environment (Cegarra-Navarro et al., 2016). By ignoring weak signals on the periphery, organizations overlook innovative ideas and growth opportunities (Pina e Cunha & Chia, 2007). As a strategic thinking competency and the first stage of foresight, framing is a fundamental methodology for vision conception and will be discussed further in Chap. 4.

Step 4: Flip the Switch

The research question driving the content of this chapter asks, "Can an organization learn to see?" The tentative answer is "yes!" Gravity Payments shows us just how it happens.

Gravity Payments Learned to See

Fintech firm Gravity Payments serves as a compelling case study for the flip side of the traditional visionary approach to leadership. When faced with a 55% revenue shortfall caused by fallout from the COVID-19 pandemic, former CEO Dan Price and his top management team defied conventional wisdom (Schomer, 2020). They took a common-sense approach in the form of staying true to their enduring values and drawing out collective group wisdom. Some competing companies raised credit card processing fees by $100 per client. When multiplied by the 20,000 clients Gravity Payments serves, the price increase would have increased revenue by $2,000,000 a month—covering their shortfall and ideally providing a half-million-dollar surplus (Gravity Payments, 2020). In essence, they could have absorbed the impact by placing the burden on their small business clients; however, this approach misaligned with their deeply held values. The conventional strategy of deep layoffs to demonstrate quicker signs of recovery through hiring also ran counter to the company's convictions.

After much deliberation, Price worked with his COO Tammi Kroll and the senior leadership team to host an all-company meeting to layout the exact problems Gravity was facing, including, (1) a $1,500,000 monthly shortfall which equaled just over half their revenue, (2) a lack of significant cash savings (3) access to a line of credit of $6,000,000 which would provide four months of runway considering the shortfall, and (4) an opportunity to lean into their mission, stand up for workers and small businesses, and make a significant difference in a short time (Gravity

Payments, 2020). Price and Kroll held four, ten-hour meeting days to hear from each of Gravity Payments' 200 employees in small groups following the all-hands meeting. Price promised not to make any decisions until holding the back-to-back two-hour meetings. The point was to listen to the team to overcome the immediate crisis. In addition to the meetings, the management team deployed an anonymous survey revealing employees' support for team-generated solutions.

When the group closely examined the problem, an idea emerged to have a quasi-fundraiser model where employees would take voluntary, and in some cases, anonymous action. In some cases, employees would take on more roles or extra work for clients. To Price and Kroll's surprise, 98% of employees privately volunteered for a temporary pay cut, and ten employees volunteered to forego their entire salary, saving a total of $750,000 (HRK News Bureau, 2020). What was the motivation driving their request? The employees and managers genuinely cared about the company mission, their co-workers, helping small business clients, and making individual sacrifices to protect them. Due to voluntary pay cuts, expense reduction, and going the extra mile to serve clients, Gravity Payments ultimately saved $1,000,000 per month to close the $1.5 M gap, extending the runway from 4 to 12 months (Gravity Payments, 2020). Would this recovery have happened using the lone-visionary approach baked into visionary leadership? That is a difficult call to make.

After recounting the story, however, Dan stated, "our team is so much smarter as a whole—as a group—than I ever could be individually" (Gravity Payments, 2020). Such intelligence tracks back to thinking, learning, coaching, and psychological safety. Through this situation, Gravity Payments learned myriad lessons. By navigating its way through the pandemic impact, the fintech firm learned to see.

When Leaders Flip the Light Switch

What happens when an organization outgrows the capacity of its founder to see and know everything? Leaders not only know how to stand out front and cast the vision, but they also know how to galvanize support in diverse situations. In Gravity Payments' Case, the organization could not have learned to see without Price shining the light and putting the brutal facts on display. Vision-based leaders inspire team members and customers to pursue the vision and teach organizational stakeholders how to see in new ways. They know how to spark individual creativity and build the synergy needed to shape the preferred collective future.

Price flipped the light switch by telling the unfiltered truth and allowed Gravity Payments' team members to see the problems more clearly. Unfortunately, his approach is the exception and not the rule. Many leaders paint rosy pictures of reality and wonder why their people do the same when talking to them. Scott (2009) called this approach "legislated optimism," defined as the discouragement of honesty, distortion of reality, and insistence on everyone perpetuating a leader's rosy version of a present crisis (p.250). Regarding its association with organizations, vision can be conceptualized in many ways, including (1) the human phenomenon of seeing, (2) a construct in business literature, (3) an organizational phenomenon, (4) a final product (i.e., vision statement) which implies an associated vision creation process.

Step 5: Create Lines of Sight

Peter's incoming supervisor, Diane, impressed him from day one. She was hired by his marketing firm in early May—two months before our conversation. Whereas many leaders would come into a new role immediately making their mark on the organizations, it made more sense to Diane to understand the line of sight her team members share. She wanted to understand the situation she walked into instead of making immediate changes to the strategy. So, Diane came in to listen and discern the challenges her team grappled with and how those challenges related to the direct link between their individual goals, the team's deliverables, and the objectives of the organization.

Overlapping lines of sight within an organization's cone of vision make for a complex picture—what is in one person's peripheral vision is another person's area of focus. Helping team members to clarify their purview and line of sight has great advantages—creativity tops the list. Once Diane understood her team member's individual lines of sight, she could begin to see the cone of vision for her department on ground level.

Step 6: Encourage Creative Thinking

The lack of vehicles produced during the Covid-19 pandemic and economic shutdown drove the prices to record highs. The lasting impact of the supply chain snafus reverberated throughout consumer markets and proved how important efficiency is to business. Companies suffer when managers pursue efficiency at the cost of innovation.

Efficiency thinking is rooted in the practice of scientific management and leads to what sociologist Allan Johnson called "paths of least resistance." Its goals are to "minimize chance, optimize performance, and take control away from individuals" (Johnson, 2008). Although efficiency thinking and scientific management have permeated American industry, business, and economics for over a century, these two practices prove insufficient to meet the demands of the VUCA environment in isolation. Fortunately, there is a new type of thinking in town—and her name is "design."

In *Designing for Growth,* Jeanne Liedtka and Tim Ogilvie proposed design thinking is a driver of organic growth and innovation, just as total quality management (TQM) drives quality initiatives. It takes "something we always have cared about and put tools and processes into the hands of managers to make it happen" (Liedtka & Ogilvie, 2011, p. 5). Designers integrate a human focus with iterative prototyping and testing while engaging in practices characterized by user focus, problem framing, visualization, experimentation, and diversity (Liedtka et al., 2020). Adopting a design thinking perspective requires leaders to shift the perception of innovation-centered activities away from the concept of waste and toward investments and experimentation (Oster, 2011). Various models of design thinking converge around seven fundamental stages.

1. Define: aptly defining the problem
2. Research: collect background information and observe users to learn more about the problem

3. Ideate: brainstorm possible solutions
4. Prototype: build quick representations of potential solutions using low-cost materials and work that prioritizes speed over quality
5. Select: choose one solution to pursue for the remainder of the process
6. Implement: the solution is built out in a more refined form and placed within the context of the problem space
7. Learn: designers collect feedback on the solution and reflect on events of the design process (Baker III & Moukhliss, 2020)

At best, leaders have the vision to grow, or at the least, to maintain the status quo. Due to the accelerated pace of change in the external environment, growth has become more elusive through traditional means. Thirty years ago, a visionary leader was responsible for single-handedly crafting and communicating a vision for the future. They expected middle managers and employees to make it happen. In the current VUCA environment, a vision emerges from organizational activity more often than from a static statement that sits on the wall. In all honesty, efficiency values do not support bold ideas.

Developing Vision with Design Thinking Techniques

Children like to draw. By the time they reach adulthood, many kids have unlearned such visual thinking skills. Design thinking helps everyone to readopt vital visual thinking skills through more structured methods like mind mapping and unstructured means such as quick sketches of ideas and prototyping.

The most vivid and creative visions often lose impact when translated into strategies and plans. The heart of an idea can lose ground swiftly in a battle of black and white boxes designed to contain logistics and details. Visual thinking techniques can help minimize this generation loss. Tim Brown emphasized the use of visual thinking to accurately express ideas, stating, "only drawing can simultaneously reveal both the functional characteristics of an idea and its emotional content" (Brown & Warren, 2009). Thinking with the eyes helps to avoid becoming too linear, too quickly.

Thinking with the hands also becomes useful through prototyping. Innovative teams have begun to use this skill outside of traditional product design. Prototypes can represent intangible items like organizational processes, experiences, and solutions (Schrage, 2016). Such visual techniques help innovators to process ideas in an action-oriented manner.

If you are a founder, CEO, departmental, or team leader, *treat your vision as a test instead of a mandate*. Be receptive to experimenting in a design-thinking style. Most importantly, let your team members test-drive related ideas in reality. The results will surprise you. Charles Kettering practiced an early form of design thinking at GM and leapfrogged Ford Motor Company by taking customers' feedback seriously. Blockbuster ignored admonitions to embrace design thinking and relegated itself to the dustbin of history. Google made an unwavering commitment to experimentation and testing, and the company has grown exponentially. Design thinking provides 101 different ways to develop a vision in real time and build the proverbial plane while it's in the air.

Step 7: Turn the Tide

Visionary leadership, by nature, takes a top-down approach. A solitary leader motivates followers with a favorable picture of the future. This image motivates followers to go above and beyond to achieve said vision. That's the ideal.

In the realities of collective life, followers exhibit a host of behaviors—attrition, disengagement, unethical behavior, withdrawal behaviors, sabotage, and coalition-building—to protect vested interests and preserve the status quo. When such behavior follows the introduction of a new vision, a fair question becomes, "whose vision were the employees and managers fighting?" A vision development consultant would also ask, "how much of a 'say' did people have in the new strategic direction?"

In turning the tide, it is important to bridge the gap between top-down and bottom up, collective approaches. Joe Sumpter, an executive and visionary leader in emerging technologies, knows when to turn the tide. As a leader in startups and Fortune 500 companies, Joe has created synergy between vision and idea generation. He advises leaders to use a shortened version of the top-down visionary leadership approach. Spending more time using the bottom-up approach works well in innovation spaces where the market condition and the strategic landscape are constantly changing. The need to pivot and iterate drives demand for new ideas.

No leader has all the answers, so thriving in a VUCA context calls for a collective approach. Herein lies the conundrum. A group or stakeholder approach naturally surfaces different views of the future. These diverse and diverging perspectives increase the complexity of the session. Remember, complex situations like entering foreign markets consist of many interconnected parts and variables, with medium-low ease of understanding and large amounts of information available (Bennett & Lemoine, 2014). The need to manage this surge of complexity can cause managers to shy away from collective approaches (Ackerman & Eden, 2011). The main challenge of complexity in building consensus is managed through the group facilitation process (Wilkinson, 2004). Suppose Johansen's (2007) intuition was correct and complexity indeed yielded to clarity. In that case, a leader's role includes helping team members and other stakeholders make sense of complex conditions without sacrificing the truth. Navigating toward clarity is well worth the extra investment of time, especially when leaders seek to help followers make sense of riddling conditions. As leaders engage the collective process, organizations should reach a type of break-even point where the need to manage complexity entering the organization from the external environment outweighs the complexity generated by internal collaborative processes.

Oliver Wendell Holmes reportedly stated, "I would not give a fig for simplicity this side of complexity, but I would give my life for the simplicity on the other side of complexity."
How does a group reach simplicity on the far side of complexity?

Organizations learn to see in multiple ways through a process of vision-related leadership coupled with vision emergence. A central premise of this book is that organizations learn to see through vision emergence and vision-related leadership. Gravity Payments learned to see in response to the CEO framing the problem, demonstrating mastery of the narrative, and telling the story. Price could have followed the status quo for economic recessions and implemented a generic solution or what Scott (2009) termed "the worst, best practices" of leadership (p.iii). In this snapshot of authentic leadership, Price faced a defining moment in which he displayed mastery of his inner game. His interactions with his team members and customers embodied the shifting paradigm in organizational management from control and hierarchy to self-organization and emergence. This type of whole group discovery represents one method organizations employ when learning to see collectively.

The founder needs to envision or see the organization in the future—and not just the positive, fluffy stuff, but what the organization could become based on decisions made in the present. In the case of Gravity Payments, Dan Price likely envisioned multiple future scenarios that would lead to what the organization intended to become. He foresaw situations that would pull the organization's identity away from its intended destination if leaders sacrificed long-term vision for immediate monetary gains. Such Founder-CEOs see the organization in the future, enabling them to anticipate how the vision will extend through its life stages. Additionally, they can see their role in the future organization, decipher what it will take to remain in the position at a later stage, and avoid a severe case of founders' syndrome. (See Chap. 4 for more on this syndrome.)

Summary

This chapter introduced the book's central research question: Can an organization learn to see? The Gravity Payments case example illustrated what caused the fintech organization to learn to see more quickly, clearly, and collectively. We also provided seven steps for founders to take to start building a visionary organization.

Key takeaways are listed below:

- Seeing is a prerequisite for visioning. Thinking is a prerequisite for learning and taking action.
- Due to its complex nature, visioning and change require a collective approach—it's "all hands, on deck!"
- Organizations learn to see through a process of vision-related leadership coupled with vision emergence.
- Founders' syndrome can prevent organizations from learning to see.
- A stakeholder's perception and perspective determine what they see.
- Visualization minimizes generation loss when conveying visionary ideas from one person to another.

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2 The Vision360 Conceptual Model

Computer vision is a growing field of artificial intelligence that empowers computers to extract information from images, videos, and other sources. As of January 2024, Failory listed nine unicorn startups specializing in computer vision and valuated between one and two billion USD. Such companies are revolutionizing market spaces including medical imaging, autonomous vehicles, and facial recognition. Artificial intelligence, machine learning, and computer vision also have great potential to accelerate the granularity of visionary organizations.

Organizational leaders must make decisions at lightning speed with the best information available. Here's the conundrum. It is impossible for any single person to know everything about an organization. "Why not," you may ask. That question brings us to the challenge of leading twenty-first-century organizations, summed up in two words:

It's complicated!

The top-down approach to leadership is used too frequently in organizations. It is not the only approach, and certainly not always the best. The main objective of this book is to make sense of the complexities that leaders experience at every level of organizational life. This chapter presents the theoretical context and a proprietary model for twenty-first-century visionary leadership. Let the sensemaking begin.

Principle 3:
Twenty-first-century organizations engage in a dynamic, multi-phased approach to visionary leadership.

Organizations transform vision into reality by engaging the four meta-phases of visionary leadership. This book proposes vision conception, adoption, creation, and integration as four phases of the Vision360 leadership framework.

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Theoretical Foundations for Twenty-First-Century Visionary Leadership

The author considered two terms when brainstorming a title for this book: vision development and visionary leadership. Much of visionary leadership literature deals with the communication of a vision and crafting of a vision statement. The development of a vision statement is different from the author's concept of vision development, which more closely aligns with and includes vision-based leadership, vision integration, strategic leadership, foresight, and organization development. This discrepancy prompted a search for the most effective way to describe this proprietary model of twenty-first-century visionary leadership.

Defining "Vision" Within a Leadership Context

This work is concerned with the cycles of vision development and iteration that lead to fulfillment; however, it is vital to define vision briefly and why it matters. Van Knippenberg and Stam (2014) defined vision as "what is conceived and communicated of an image of a future for a collective" (p.243). Writers commonly refer to vision as a preferred future. It is also the fourth of six stages in the Framework Foresight Method (Hines & Bishop, 2015). Employees and managers want to work with their leaders to shape the future (Kouzes & Posner, 2017). Moreover, Kouzes explained, "all good visions are essentially aspirational, they exist forever," which means that [leaders are] always enlisting—always communicating that vision for the future" (Jim Kouzes, personal conversation).

According to Kantabutra (2006), vision demonstrates four common characteristics. First, vision always concerns itself with a desirable future. Second, vision is critical for leadership. Third, vision is a process that inspires others to take action in pursuit of a common goal. Also, vision provides a sense of direction for organizational stakeholders. Finally, vision is the "basis for business strategy and planning" (Kantabutra, 2006, p. 39). Indeed, visions are usually more distal in time, ongoing, able to capture long-lasting qualities of an organization's product and service offerings, and present more significant challenges with monitoring progress and self-regulation toward its achievement (Van Knippenberg & Stam, 2014). Analogies and frameworks provide various ways to think about vision. For example, organizational vision has been depicted as a guiding star and a mountain rising above a strategic landscape (Tibbs, 2000). Vision statements are *not* equal to the vision. It is an expression, representation, snapshot, and iteration of the vision. Despite its connection to distal goals and terminal values, vision plays a distinct role in organizations.

Envisioning a preferred collective future creates the basis for both visionary and vision-based leadership. In traditional top-down fashion, visionary leadership posits an intended future created by the executive leader and subsequently communicated throughout the organization. It may or may not reflect the aggregate vision of organizational members, and stakeholders can either reject or accept the concept. They may know how to detect trends on the periphery, but the image may not incorporate identified threats and opportunities or reflect their focus areas. In extreme cases, followers may not see themselves in the picture of the future the leader paints. The terms "vision-based leadership" and "vision-related leadership" indicate a comprehensive process a visionary or founder of an organization initiates to turn its vision into reality, amid resistance from external and internal factors (Kantabutra, 2005, 2006, 2008a; Kantabutra & Avery, 2002; Kantabutra & Avery, 2003; Kohles, 2001). Vision-based leadership represents a more comprehensive construct than its communication-centered counterpart, visionary leadership. Hence, vision-related leadership is more omnidirectional than visionary leadership.

Vision in Organizations

Many definitions cite the ability of a vision to motivate followers (Van Knippenberg & Stam, 2014). Researchers have also found that vision is indispensable to leadership, strategy implementation, and change (Kantabutra, 2008b). Van Knippenberg and Stam (2014) suggested:

> Visionary leadership…should lend itself better than goal-setting to successfully motivating more uncertain and open-ended endeavors such as innovation, collective change, and extraordinarily high performance—outcomes for which leadership is sought in particular.... it is not unreasonable to see visions as goals, but they should be understood as specific types of goals that are distinct from the goals emphasized in goal-setting theory. (p. 243)

Though many definitions exist, a vision should accomplish three purposes: "to inspire organizational members, to provide a focus for employees' efforts and motivate them to accept and implement the organization's goals, and to create commitment to the desired future organizational state" (Haque et al., 2020, p. 161).

The Science of Vision-Related Leadership

To fully understand the relevance of the Vision360 model requires a brief explanation of its evidence-based assumptions.

Construct: Visionary Leadership

Visionary leadership emerged as a subset of transformational leadership in the United States during the late 1980s and early 1990s at a time when conditions in the external environment had begun to shift. Vision, with "its connotations of foresight and positive goals" seemed appropriate to describe how leaders "met the challenge of simultaneously ensuring organizational adaptation and empower employees" to meet the challenges related to global competition, shortened technology development cycles, and shortened shelf-life of corporate strategies that began to prevail at the end of the twentieth century (Conger, 2004).

A bulk of research exists on vision creation and communication as a function of visionary leadership. In reviewing the state of science surrounding visionary leadership, Van Knippenberg and Stam (2014) stated:

> in contrast to [the broader perspectives of charismatic and transformational leadership], we understand visionary leadership as exclusively concerning the communication of a vision, an image of the future of a collective (e.g., team, organization, nation). (p.241)

Variables

A summary of the evidence on visionary leadership, as performed by Van Knippenberg and Stam (2014) listed independent, moderator, and outcomes variables used in related studies.

1. *Independent* variables included elements of visionary leadership such as vision content, image-based rhetoric, metaphors, values, follower needs, appropriateness, motives, time-orientation (e.g., past, present, future), optimism, collective interest, regulatory focus, and charismatic delivery.
2. *Moderator* variables categories included the source of the vision, task context for vision communication, and followers' characteristics (Van Knippenberg & Stam, 2014).
3. *Outcome* variables included follower leadership evaluations, follower psychological states (e.g., collective identification, emotional commitment, continuance commitment, role-breadth self-efficacy, job satisfaction, work engagement, positive affect, and possible selves), collective behavioral/performance outcomes (e.g., economic growth, venture growth, unit effectiveness), and individual behavioral/performance outcomes (e.g., performance, proactivity, adaptability, and contributions to cause) (Van Knippenberg & Stam, 2014).

Vision communication is more widely known than other factors of visionary leadership.

Outcomes

Outcome variables test the effectiveness of visionary leadership. When it comes to distal organizational outcomes, visionary leadership is normally evaluated in light of leadership effectiveness. A handful of studies examine the impact of organizational effectiveness. According to Van Knippenberg and Stam (2014), visionary leadership outcome variables included follower leadership evaluations, follower psychological states (e.g., collective identification, emotional commitment, continuance commitment, role-breadth self-efficacy, job satisfaction, work engagement, positive affect, and possible selves), collective behavioral/performance outcomes (e.g., financial performance, economic growth, venture growth, unit effectiveness, team performance), and individual behavioral/performance outcomes (e.g., performance, proactivity, adaptability, and contributions to cause). On the one hand, leaders and stakeholders normally establish desired outcomes during a firm's vision translation process (Sosik & Jung, 2018). Such outcomes are company-specific. On the other hand, academic literature on research-based outcomes of vision and visionary leadership is fragmented.

Construct: Vision-Based Leadership

The science of vision-based leadership reflects a paradigm shift and reconceptualization of visionary leadership. An integrative review of organizational visioning by O'Connell et al. (2011) set the stage by updating the literature, contrasting visioning processes conducted in group settings with leader-driven vision development, offering a comprehensive perspective on the development, implementation, and impact of visioning in organizational settings. Studies on the specific construct of vision-based leadership revolve around the work of Sooksan Kantabutra, Gayle Avery, and additional research partners.

Vision Realization Factors, Themes, and Variables

Kantabutra and colleagues refer to several groups of factors ultimately impacting the fulfillment of organizational vision. First, vision *attributes* include brevity, clarity, future orientation, stability, challenge, abstractness, and desirability or ability to inspire (Kantabutra, 2006). Though it varies by company, vision *content* also impacts its realization. Second, vision *realization* factors and themes include formulating strategies and plans for achievement, communicating vision to promote change and engender support, alignment of people and supporting systems, empowering people for consistent action to sustain commitment to the vision, motivating followers, acquiring support from internal and external stakeholders, and adjusting organizational infrastructure to support the vision (Kantabutra, 2006; Kantabutra & Avery, 2002). Third, *intervening* variables can be divided into four sets: leader, follower, organizational, and external factors (Kantabutra, 2005, 2006). *Leader* factors include vision communication, passion for the vision, behavioral consistency, organizational alignment, ability to exercise authority, empowerment and motivation. *Follower* factors include vision guiding (i.e., “use of vision to guide their work”), shared vision that aligns with personal visions, and emotional commitment (Kantabutra, 2005, 2006). *Organizational* factors include financial support and human resource support. *External* factors include industry-wide government intervention and changes in the business environment.

Outcomes

Regarding distal organizational outcomes, vision-based leadership studies have most consistently measured vision realization factors against organizational **performance** outcomes including employee satisfaction, customer satisfaction, and financial outcomes (see Kantabutra (2006) for a comprehensive listing of factors correlated with authors). Kantabutra and Rungruang (2013) examined relationships between the vision realization factors of vision communication, motivation, and employee empowerment; employee satisfaction, and affective organizational commitment in a Thai state-owned energy provider. Kantabutra (2008a) examined "the relationships between vision attributes and content, and customer and staff satisfaction in Thai retail stores, taking into account vision realization factors of vision communication, organizational alignment, motivation of staff and empowerment of staff" (p.323). Kantabutra and Avery (2007) examined:

> the relationships between vision attributes (of brevity, clarity, stability, abstractness, future orientation, and desirability or ability to inspire) and content (relating to customer and staff satisfaction imageries), and customer and staff satisfaction in Australian retail stores, taking into account vision realisation factors of vision communication, organisational alignment, motivation, empowerment and a staff personal factor comprised of staff emotional commitment to and use of the vision. (p.209)

Kantabutra (2010a) explored "the relationships between visions and vision components, and staff satisfaction in Thai retail stores, taking into account variables of vision communication, motivation of staff, and hybrid staff factor" (p.1). He found a negative vision effect as vision and its content are "two direct predictors of decreased staff satisfaction while motivation and staff factor enable the direct, negative vision effect on staff satisfaction. Vision attributes, vision communication, motivation and staff factor are indirectly predictive of enhanced staff satisfaction" (Kantabutra, 2010a, p. 1). Kantabutra (2010b) proposed a research model "for examining relationship between vision components and performance of higher education institutions, as measured by financial stability, student satisfaction and growth, process improvement, and learning and faculty satisfaction" (p.376). The model proposed "vision attributes of brevity, clarity, abstractness, challenge, future orientation, stability, and desirability, and vision content relating to financial stability, student satisfaction and growth, process improvement, and learning and faculty satisfaction can affect performance through four vision realisation variables" (Kantabutra, 2010b, p. 376). Kantabutra and Saratun (2011) investigated the effects of vision-based leadership on follower satisfaction in Thai state enterprises. This study extended previous research by examining the relationship between vision realization factors and employee satisfaction. Findings indicated "vision communication, motivation, and empowerment of employees are directly predictive of enhanced employee satisfaction at the Thai state enterprise" (Kantabutra & Saratun, 2011, p. 996). Kantabutra (2020) "advanced a theory of organizational vision into a coherent theory of sustainability vision," which asserted "effective sustainability visions are characterized by the seven attributes of brevity, clarity, future orientation, stability, challenge, abstractness, desirability or ability to inspire and one imagery of stakeholder satisfaction" (Kantabutra, 2020, p. 1). This work represented a culmination of sorts, as his early work Kantabutra (2006) proposed a framework of vision-based leadership as a sustainable business performance model.

Construct: Vision Integration

Vision integration is a new topic compared to visionary and transformational leadership studies. Kohles et al. (2012) defined vision integration as the "degree to which vision is used in work behaviors and decisions (e.g., used as a guiding framework)" (p.478). Leadership and business literature hints at its existence, often referring to implementation; however, Kohles (2001) was the first researcher to name the phenomenon, create the construct, and conduct empirical studies around the topic. In a study of health maintenance organizations (HMOs), Kohles et al. (2012) confirmed the critical nature of communication for vision integration. Moreover, they found how followers understand and integrate the vision into work behaviors and decisions "significantly predicts commitment, job satisfaction, and supervisory ratings of performance" (p.476). In testing an assumption of vision integration, Kohles et al. (2013) explored the relationships between follower involvement in communicating a new vision and the ultimate adoption of the vision. The study involved 1481 employees from a large supermarket chain who completed surveys concerning "vision knowledge, perceptions of the vision's innovation characteristics (i.e., relative advantage, compatibility, trialability, observability, and complexity), bi-directional leader-follower communication about the vision, perceived integration of the vision into work behaviors, and organizational commitment" (Kohles et al., 2013, p. 467). Based on their findings, they (1) recommended conceptualizing vision as an innovation and actively inviting follower involvement in decisions to adopt or reject the vision and (2) advocated for a more balanced approach highlighting the roles of both followers and leaders. All three of Kohles' studies found vision integration to be significantly and positively associated with organizational commitment.

Two additional sources are noteworthy. The results of a study conducted by Weaver (2016) built on such research "to reveal that transformational leadership leads to the follower outcome of vision integration….[and] the impact of transformational leadership on vision integration is stronger when certain behaviors are enacted by the appropriate organizational leader" (p.144). Most recently, Slåtten et al. (2021) investigated factors related to organizational vision integration among hospital employees. Their study investigated the impact of psychological capital and organizational attractiveness on organizational vision integration (OVI) and, subsequently, creative performance (CP), which refers to "individual employees' capability to be creative and innovative" (p.4). With links to diffusion, behaviors, and decisions, the scope of vision integration could be wide-ranging, but a dearth of empirical research exists on the topic.

Two Polarities of Visionary Leadership

The tug of war between the top-down/bottom-up and inside-out/outside-in approaches to vision-related leadership is even more stealthy. The top-down and inside-out approaches rely heavily on *leader agency. The* bottom-up and outside-in

Table 2.1 Holding leader agency in tension with emergence

	Leader agency	Emergence
Who drives change?	A change agent	System agents
What is their task?	To actively shift the status quo	To continually self-organize
How do they accomplish the task?	Using intentional actions and processes	Using a few simple rules
What is the intended result?	To initiate and produce a new state of affairs	To allow and encourage an infinite variety of creative responses
What is the context?	Bringing order to a chaotic situation within a changing environment	To lean into the chaos and complexity of a changing environment
Associated with:	Changing strategic direction Culture transformation Replacing top leadership American management style Top-down communication	Whole group discovery process Strategic thinking exercises Distributed/shared leadership Japanese management style Bottom-up communication
Examples include:	School principal improves student performance Professional CEO turns around a global corporation	Ant colonies preserving job functions The "wave" at sports events Flocks of birds and schools of fish

approaches reflect *emergence*. The next section will explain leader agency and emergence as foundational components of the theory supporting this model (Table 2.1).

Agency

The twentieth-century paradigm of visionary leadership was built around a leader's agency. As a term rooted in the social sciences, the concept of agency has been long established within educational practice as discussed by Eteläpelto et al. (2013). Despite the confusion resulting from the lack of a formal definition, the use of *agency* has increased in popularity within education, social sciences, psychology, working-life studies, and gender research. Agency has gained relevance in discussions about workplace learning and professional work in creative and human-focused domains (i.e., teaching and the arts). The term also has positive connotations for creativity, motivation, well-being, and happiness; it connects to autonomy, self-fulfillment, catalyzing change (i.e., being a "change agent"), resisting structural power, and manifesting intentional action. In a succinct and action-oriented description, Dale and Sparkes (2011) defined *agency* as "**intentional actions** and **processes** that result in a **new 'state of affairs'** that would not have otherwise **emerged**" (p.476, emphasis added). For example, a group or individual who initiates and implements change within an organization is considered a change agent (Law, 2016). The concept of agency connects to learning, action, and change.

Leader agency underscores the metanarrative of organization theory. Organizations have been studied largely from the vantage point of the leader and not the follower. Visionary leadership provides a case and point. Van Knippenberg and Stam (2014) posited "leader agency as an essential element in visionary leadership" because vision is "more effective when originating from a leader than when it was routinized" (p.244). Leader agency in visionary leadership is juxtaposed with "the study of visions without leader agency but either as shared understanding within a team (Pearce & Ensley, 2004) or perceived as a depersonalized project vision (Lynn & Akgun, 2001) or organizational vision (Oswald et al., 1997; Testa, 1999)" (Van Knippenberg & Stam, 2014, p. 244) . Kohles et al. (2013) proposed "to a large extent, the leader's role is to capture the foresight that often already exists throughout an organization" (p.469). When employed, leader agency can help organizational stakeholders learn to see collectively.

Emergence

Toward the end of the Covid lockdowns, I conducted a focus group for organization development professionals to discuss the Vision360 leadership framework. One of the attendees, who is a brilliant conflict management consultant, proposed the following thought:

> Thomas, vision is future focused. We know that. But right now, vision is very present-focused. My clients are asking 'What are we going to do today?'

Emergence takes the future and brings it into the present. It can turn a future envisioned by one person into a shared future imagined by all. This is what group collaborative sessions do—take the future and bring it into the present to answer the question, "What do we want to create?" Integration brings this future into reality on a daily basis.

Historically, emergence has been less prominently featured in visionary leadership theory, especially in Western organizations. Ironically, this specific type of self-organization not only shows up in organizations; it is often undetected. The world grows more complex each year. So, emergence happens by design or default. To fully appreciate the power of emergence, it helps to understand complex, self-organizing systems.

Organizations are complex systems that continually adapt to the volatility, uncertainty, complexity, and ambiguity in the business environment. According to the open-systems perspective on organizations, systems are deemed complex due to a few factors. First, open systems exchange resources with the environment, making them more intricate than closed systems (Anderson, 1999). Second, complex systems are composed of many interconnected parts or variables that "interact strongly to determine system behavior" (Svyantek & Brown, 2000, p. 69). These interactions will not allow the system to be explained by simply breaking it down into its constituent parts. Finally, a CAS demonstrates stability when observed across time

(Svyantek & Brown). Complex systems have five distinct components: self-organization, emergence, feedback, sensitivity to initial conditions, and attractors. The rest of this subsection will highlight the first two CAS components.

The first component of a CAS, self-organization, represents the central concept of chaos and complexity theory. Self-organization begins with simple rules deployed in an interconnected network to produce a pattern of order (Mason, 2007). Instead of being controlled by a manager or another outside party, this process "spontaneously self-organizes from the bottom up through the inter-relationships of the system's parts" (Mason, p. 12). As a result, individual managers "cannot predict and plan longer-term outcomes (Wilkinson & Young, 1998; Frederick, 1998; Kelly, 1999), but by fine-tuning the simple rules that determine the system, it can be moved between [the boundaries of] stability and chaos (Lewin, 1993)" (Mason, p. 12).

Emergence is the second element of complex adaptive systems. Emergence is a specific type of continuous self-organization that "allows and encourages an infinite variety of creative responses to emerge from changing environments" (Mason, 2007, p. 12). It occurs when a system moves toward disorder because its parameters change. This is notable because

> too much order causes the system to become ossified…[implying] that to cope with change the system should be kept at the edge-of-chaos….[where] CASs continuously reorganize themselves into new patterns of relationships and from these new patterns, new possibilities for action emerge. (Mason, pp. 12–13)

Emergence consists of two interdependent mechanisms: self-organization and synergy (the "reformulation of existing elements to produce outcomes that are qualitatively different from the original elements" (Uhl-Bien et al., 2007, p.308)). Examples include the "development of new strategies (Conner, 1998), development of marketing tactics for specific prospects (Forrest and Mizerski, 1996), self-directed teams (Gault & Jaccaci, 1996) and growth of strategic alliances (Wilkinson & Young, 1998)" (Mason, pp. 12–13). In *Facilitating Organization Change*, Olson and Eoyang (2001) discussed organizational emergence in reference to strategy, goals, and visioning. The thread of emergence begins in the VUCA environment and finds its way into organizations through complexity theory, and complex adaptive systems (CAS) in particular. Emergence finds its way into visionary leadership theory through vision emergence (discussed in Chap. 3) and organizational emergence of entrepreneurial ventures (discussed in Chap. 6).

The Limitations of Visionary Leadership Theory

Visionary leadership theory is largely bound by time and geography. It is deeply rooted in the biases of established organizations in the Western world of the late twentieth century. As such, assumptions of the charismatic-transformational leadership tradition are baked into the visionary leadership approach. These assumptions misalign with those of new ventures. A search for academic literature yielded the following insights:

1. Visionary leadership is a core component of transformational leadership.
2. Much literature exists on topics such as transformational leadership and corporate entrepreneurship. However, a shortage of scholarship exists at the intersections of visionary leadership and the following topics: entrepreneurship, startups, high-growth firms, small and medium enterprises, and organization development. Also, a dearth of scholarship exists on visionary entrepreneurship.
3. As an offshoot of transformational leadership, visionary leadership theory is contextualized for established businesses, not startups. When contextualized for entrepreneurship, transformational leadership yields corporate entrepreneurship (i.e., corporate venturing). Current scholarship in this area examines how entrepreneurs use the transformational leadership style, skills, and behaviors, along with their impact on organizations.
4. Independent, non-corporate startup vision is not addressed under the keywords of transformational leadership or visionary leadership. Startup vision is addressed under "entrepreneurial leadership" and more generally under entrepreneurship.

Leadership scholars and practitioners have expressed the need for a more comprehensive approach to organizational vision development. In his work on vision integration, leadership expert Jeffery Kohles' (2001) called for a "reconceptualization of vision for research and practice" (p.3). Most literature on organizational vision deals with the content, attributes, and characteristics of a vision statement. Visionary leadership experts have called for an approach that extends beyond creating a vision statement (Kantabutra, 2008b; Kantabutra & Avery, 2003; Kohles, 2001; Srinivasan, 2014). Scholars also recognize that as an outgrowth of charismatic-transformational leadership theory, the demand for twenty-first-century visionary leadership has outgrown the boundaries of a charismatic-transformational leader telling their vision to the rest of the organization (Senge et al., 1994). Moreover, Van Knippenberg and Stam (2014) advised researchers to:

> Move beyond charismatic-transformational leadership in conceptualizing and operationalizing visions and visionary leadership....[though] effective visionary leadership may include elements identified in charismatic-transformational leadership theory....integrating insights from a variety of literatures—leadership and non-leadership alike—will be essential to move beyond the inherent limitations of the currently dominant charismatic-transformational paradigm. (p.255)

In response, complementary mental models and conceptual frameworks in areas of vision-based leadership (Kantabutra, 2008b, 2020; Kantabutra & Avery, 2002), strategic leadership (Ireland & Hitt, 2005), strategic foresight (Hines, 2006), and vision integration (Kohles, 2001; Kohles et al., 2012, 2013) have been juxtaposed in the creation of this chapter's proprietary framework.

A Comprehensive Mental Model for Vision Development and Realization

Organizations move through the vision development and realization process undetectably. With more new businesses sprouting up than ever before, founders must be able to picture their organization moving through its vision development and realization cycles as it coordinates internally and adapts to its business context. This book will contribute to the shifting paradigm and reconceptualization of visionary leadership by providing a mental model that represents the process of vision development and realization over an organization's life cycle.

This book proposes a conceptual model to resolve the cognitive dissonance experienced between disparate concepts related to vision iteration. This framework will build upon future directions for vision-related research as scholars indicate and reflect on the iterative process organizations take to create, articulate, and integrate vision into organizational life.

Principles of a Conceptual Framework

The Vision360 model stops short of qualifying as what would be generally considered a theoretical framework and instead lays the groundwork for its creation. Researchers have used the terms conceptual framework and theoretical framework interchangeably (Green, 2014). However, Van Knippenberg and Stam (2014) comment that while research in visionary leadership contains many qualitative case studies, "only quantitative research can test theory. Only quantitative research can thus qualify as evidence in assessing the merits of theoretical notions, even when the theory tested may have a solid basis in qualitative research" (p.257). Before presenting the framework, this section will define a conceptual framework, discuss its relationship to grounded theory, and juxtapose it with a theoretical framework. Jabareen (2009) described a conceptual framework as:

> A network, or 'a plane,' of interlinked concepts that together provide a comprehensive understanding of a phenomenon or phenomena. The concepts constituting a conceptual framework support one another, articulate their respective phenomena and establish a framework-specific philosophy. Conceptual frameworks possess ontological, epistemological and methodological assumptions, and each concept within a conceptual framework plays an ontological or epistemological role. (p.51)

Ontological assumptions "relate to knowledge of the 'way things are,' 'the nature of reality,' 'real' existence, and 'real' action (Guba & Lincoln, 1994)" (Jabareen, 2009, p. 51). Epistemological assumptions relate to "'how things really are' and 'how things really work' in an assumed reality (p.108)" (Jabareen, p. 51). Methodological assumptions relate to "the process of building the conceptual framework and assessing what it can tell us about the 'real' world" (Jabareen, p. 51).

Jabareen (2009) suggested using grounded theory for building conceptual frameworks due to several factors. First, it uses coding paradigms and conduciveness to systematically collect data for the purpose of theory building. Second, grounded theory functions as an inductive methodology to discover theory. This method also "facilitates 'the generation of theories of process, sequence, and change pertaining to organizations, positions, and social interaction (Glaser & Strauss, 1967, p.114)" (Jabareen, 2009, p. 52). Finally, researchers can use grounded theory to build a "context-based, process-oriented description and explanation of the phenomenon, rather than an objective, static description expressed strictly in terms of causality (Anderson et al., 2003, p.50; see also Orlikowski, 1993)" (Jabareen, 2009, p. 52). According to these definitions, this book functions as a conceptual framework and launching point for theory building.

Conceptual Foundation for the Vision360 Framework

While visionary leadership was gaining support, scholars such as Ira Chaleff and Barbara Kellerman examined the role of followers in collective life. Followership is unique because it can stand alone or share a symbiotic relationship with leadership theory. The conceptual foundation integrates principles of leadership and followership. The rest of this section will discuss how leader agency and self-organization set the stage for the Vision360 framework.

Leader Agency

Leaders use their agency to produce a range of results. Transformational leaders communicate the vision. Change agents implement initiatives that align the organization with a long-term strategic direction. Leader agency has not been discussed explicitly or extensively in business literature, but researchers frequently allude to the concept. Leadership experts Bruce Winston and Kathleen Patterson (2006) integrated leader agency with follower-centricity within a context of vision realization and described associated activities, including:

- Selecting, equipping, training, and influencing followers
- Focusing followers on the collective mission and objectives
- Inspiring followers to "willingly and enthusiastically expend spiritual, emotional, and physical energy" to achieve the mission
- Humbly conveying "a prophetic vision of the future in clear terms that resonate with the follower(s) beliefs and values"
- Casting vision in such a way that "follower(s) can understand and interpret the future into present-time action steps"
- Contrasting the prophetic vision with the organization's current state (i.e., status quo)
- Employing a wide range of skills and competencies (e.g., critical thinking, insight, intuition, persuasion, active listening, and appreciative inquiry) to facilitate and draw out followers' opinions and beliefs

- Initiating forward movement "through ambiguity toward clarity of understanding and shared insight"
- Influencing followers to envision and accept the preferred future of the organization as desirable and "worth committing personal and corporate resources toward its achievement" (p. 7)

The leader is an agent of change, and their agency provides one component of the framework for the Vision360 process. The second component is self-organization.

Self-Organization

What do "the wave," ant colonies, and cars navigating a roundabout have in common? In each situation, the actors use principles of self-organization to accomplish tasks. Self-organization assumes people can arrange themselves to get the job done, even when they are not under a leader's influence. Have you ever considered a flock of birds flying south for the winter? Due to the complexity of the task, there is no clear leader. The birds operate by a handful of simple rules: stay together, don't crash into one another, and avoid obstacles and predators (Cabrera Lab, 2017). Flocks of birds and schools of fish must follow the simple rules of self-organization to survive.

One would think that a leader has nothing to do with self-organization. That is untrue. Leaders first need to accept emergence and self-organization as characteristic group behavior and then use it to benefit the organization. They should not fight self-organizing behavior but allow space for it to happen, learn the rules of different departments and the things that make them self-organize—and what they self-organize around. Bottom-up leadership is similar to the concept of managing upward and increasing employees' comfort level in giving upward feedback without fear of recourse.

Visionary leaders use their agency to take action, but they do not directly produce self-organization. They nurture an environment where spontaneous and creative responses can emerge. A visionary leader's role is to prevent leader agency and self-organization from being at odds with each other (Fig. 2.1). Organizations survive and succeed because they develop a type of immunity to external threats. Unless vision emerges under specific conditions, the culture will fight it. The behaviors supporting the old vision are embedded into the company's culture at a deep level. When existing organizational members are allowed to self-organize in relation to a new vision, unmitigated chaos can ensue in the form of antibodies. To avoid a Level 5 conflict, a visionary leader needs the foresight to unfreeze the culture's immunity to external threats. Chapter 8 talks more in depth about the importance, purpose, and methods associated with unfreezing cultural immunity to increase acceptance of a new vision. Visionary leaders orchestrate work, optimize systems, and empower team members to perform at their best.

The minimum viable product (MVP), a common rapid prototyping practice, is rooted in self-organization. The principle of minimum specifications proposes that systems need both the capacity and freedom to evolve. The central idea is that "if a system is to have the freedom to self-organize it must possess a certain degree of

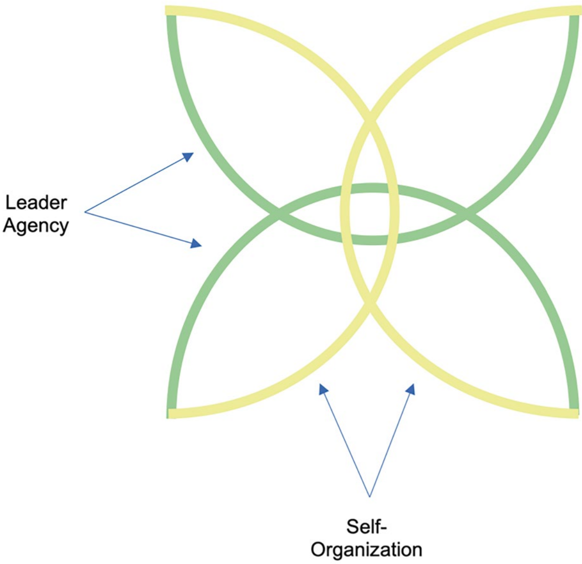

Fig. 2.1 Visualizing the healthy tension between leader agency and self-organization

'space' or autonomy that allows appropriate innovation to occur" (Morgan, 2006, p. 110). Many leaders do not afford organizations the freedom to self-organize "because management has a tendency to overdefine and overcontrol instead of just focusing on the critical variables that need to be specified, leaving others to find their own form" (Morgan, 2006, p. 110). The typical vicious cycle of overcontrol "negates any redundancy, variety, and innovative potential that [a] unit may possess because attention gets focused on the internal rules and controls instead of absorbing and dealing with the external challenges being faced" (Morgan, 2006, p. 111). This principle suggests "managers should define no more than is absolutely necessary to launch a particular initiative or activity on its way" (Morgan, 2006, p. 111). To see optimal results, managers should demonstrate a willingness to relinquish some control in favor of a productive group process that will lead to desired outcomes.

Four Phases of Vision360 Leadership

Organizations learn to see using a four-phase process (Fig. 2.2). Based on existing literature, the author developed a conceptual foundation and framework for vision-related leadership after reorganizing constructs and concepts of vision-related literature into four phases. This section will explain the four phases of Vision360 leadership. The vision *conception* stage marks a common starting point of the Vision360 process and the vision search. At this stage, foresight practices like horizon scanning and trend analysis help leaders and followers to detect conditions within and absorb information from the external environment. Neither vision-based leadership, visionary leadership, nor vision theory (Kantabutra, 2009) expressly

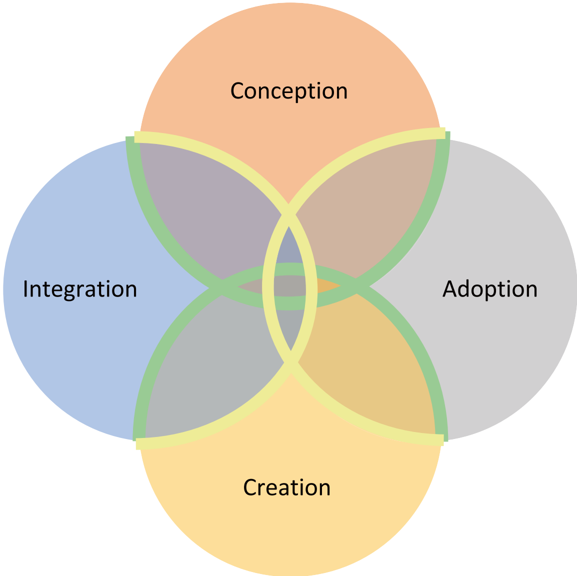

Fig. 2.2 The four phases of Vision360 leadership

identifies conception as a stage of vision-related leadership. However, the vision conception phase is embedded in vision literature, although visionary leadership and vision-based leadership typically begin with or at least imply the act of vision creation. Involving followers in what is happening in the business environment helps them to sense the need for change (Burke, 2018). Vision precedes effective change, and the conception stage is vital to generate the buy-in and consensus necessary for change leadership. The conception stage can be deduced through literature in phenomena such as vision and life cycle triggers, leader agency, strategic leadership and foresight, and peripheral vision. Visioning and strategic foresight share common ground: anticipating and shaping the future. Chapter 4 is dedicated to vision conception.

In the *adoption* phase, leaders begin encoding the vision into the organization. Undergirding the entire premise of this book is the idea that vision is not a given. Vision adoption grows out of the idea that vision functions similarly to an innovation that can be accepted or rejected by stakeholders (Kohles et al., 2013). Undoubtedly, this view presents a harsh reality for the average Founder-CEO, and as a result, some startups and small businesses suffer. A leader can mandate the implementation of a vision, even forcing and manipulating members to act. In this case, the preferred future was not truly accepted and thus lost its power to motivate and mobilize stakeholders to take appropriate actions.

A few critical activities can increase the level of acceptance. Translating the vision into action helps shape stakeholders' perceptions that the vision will produce tangible and intangible net gains. It is also essential to diffuse the visionary idea throughout the organization with consistent, two-way, interpersonal communication and more institutionalized means (e.g., sending messages with organizational structures, rewards, compensation, and evaluation) (Sosik & Jung, 2018). Communication occupies a prominent place within the science of visionary leadership (Van

Knippenberg & Stam, 2014); however, diffusion is a specific type of communication in which messages center on a new idea and imply the alteration of social realities (Rogers, 2003). These activities lead to vision assimilation, defined as "the degree to which vision is owned and shared by organizational members" (O'Connell et al., 2011, p. 104). Translation and diffusion are subphases of vision adoption, and assimilation is a desired outcome of the collective visioning process. Chapter 5 unpacks the translation and crystallization aspects of adoption.

The need to rewind to earlier stages of Vision360 becomes increasingly apparent during vision adoption. Some organizations bottom out in a buy-in basement—what I call the Adoption Pit—and lack the momentum to make the upward trek from adoption to integration. The individual and collective movement needed for an organization to avoid bottoming out during adoption is generated during the conception and creation stages.

Vision *creation* represents the third stage, wherein a widely held sense of the preferred future intentionally and organically develops within an organization. This development typically happens organically through a mixture of leader agency and emergence. A lone visionary leader will usually create a vision before convincing top management of its merits. Sometimes, a leader will collaborate with the top management team and key stakeholder representatives to develop a vision statement. Vision can also emerge during the facilitation of a whole group experience. The level to which a big idea is shared among stakeholders reflects the effectiveness of its conception and development. Chapter 7 discusses the relationship between vision emergence and creation.

People and organization development, decision-making, and implementation behaviors take center stage in the *integration* phase. The primary aim of this stage is to prompt organizational members to use the vision to guide their daily activities and decisions (Kohles, 2001). Vision integration reflects a high level of follower-centricity, evidenced in vision emergence while mobilizing implementation behaviors and shaping work decisions. This stage shapes work decisions linked to the development of people, leaders, cultures, and organizations. Chapter 8 discusses the optimization and transformation of organizations to accommodate vision integration. Vision integration includes *implementation behaviors* such as creativity, innovation, visualization, perception, design thinking, rapid prototyping, and experimentation. Chapter 9 discusses diffusing vision to the individual level through creativity, innovation culture, and empowering followers to make vision-based decisions.

Based on an evaluation of vision-related academic and business literature,
this book proposes the Vision 360 model, which includes four phases:
***Conception, Adoption, Creation, and Integration*.**

The Vision360 conceptual model details the comprehensive process a founder-CEO takes with their business to identify a preferred future and transform it into reality amid resistance from myriad external and internal factors (Fig. 2.3). This concept encompasses the conception, creation, adoption, integration, and realization of a shared future vision over the organization's lifetime. The founder-CEO generally takes the first loop of this vision journey alone, the second loop with a top management team, and the third loop with a subset representing the organization-at-large.

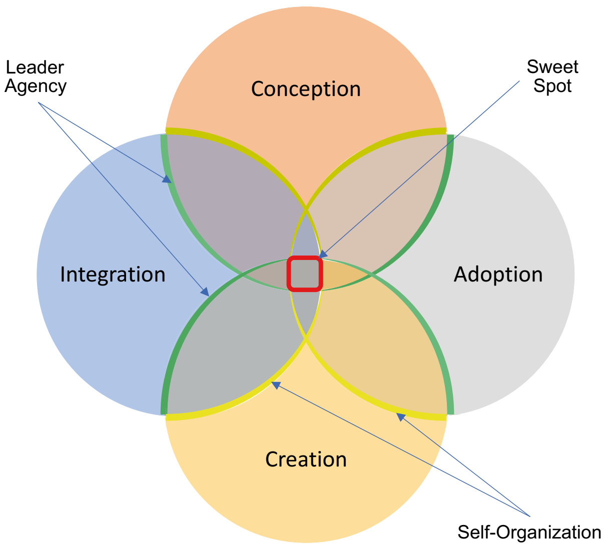

Fig. 2.3 The complete Vision360 leadership model

The framework synthesizes the literature to accurately explain vision development and realization, beginning with vision conception and ending with integration and iteration. At this point, one may ask, "is the Vision 360 model a demonstrated need or a byproduct of the researcher's own bias?" Chap. 3 will discuss well-known case examples of how organizations engage the phases of the Vision360 model.

Summary
Research links a collective vision to high performance. This chapter made the case for more effective and intentional shared visioning. Using the Vision360 framework, leaders can revisit earlier phases of the vision development process. When comes to the Vision360 process, it is important to take away several points from this chapter.

- Vision360 recontextualizes visionary leadership for independent startup organizations and ventures within existing companies.
- Meaningfully involving stakeholders in the vision development process from the outset increases buy-in for and commitment to the vision and resulting change effort. Leader agency is critical to this process.
- Leaders use their agency to orchestrate the Vision360 process.
- This book proposes the Vision 360 model, which includes four main phases: vision conception, creation, adoption, and integration.
- The Vision 360 model implies that leaders and organizations will take multiple loops on the Vision Journey.
- The entire VDR process is held together by leader agency and self-organization, which leaders hold in a healthy tension.

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3 Vision Iteration: Are You in the Zone?

At the beginning of my career, I worked with a rural, faith-based organization around Richmond, Virginia. The church's senior leader had written a vision document three years prior. The members were not walking the vision out, which caused the leader to question the validity of their preferred future. So, as a young professional with excess energy, I was brought in to shake things up. The senior leader went back and forth for a few weeks, asking, "Should I change the vision? Do we need a new vision?" He ultimately decided not to make changes. The vision was still valid, and its lack of realization reinforced its validity.

This case highlights a pain point—and perhaps a paradox—for visionary leaders: Vision is realized in loops, not lines. What can seem like a change in the vision is a change of direction. The strategic direction does not always change, but the visionary leader often finds it necessary to temporarily shift their focus. This is all part of the vision iteration process and leads us to the principle of this chapter.

Principle 4: Visionary Organizations Iterate Vision

In his TEDx talk, product design expert Brendan Kearns spoke of the tug-of-war between vision and iteration. He advised product developers against allowing speed to stop them from building a vision worth realizing (UX Brighton, 2019). While viewing Kearns' talk, I discovered many of the insights he contextualized for product vision iteration also apply to organizational vision. Until now, there has been no name for the vision development and realization cycle. May this process be forever known as vision iteration.

Vision iteration starts with a good enough vision. The Vision360 model positions leaders at the center of a four-stage process. At this convergence point, the visionary balances leader agency with self-organization to navigate the nine zones of Vision360 leadership. Entrepreneurial teams and established organizations can take the vision through several iterations when leaders give followers the freedom to test the vision.

The vision development and realization process = Vision Iteration

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https://doi.org/10.1007/978-3-031-67725-0_3

The Vision Journey: Taking Multiple Loops of Vision Iteration

Dynamic organizations are constantly in motion. By coordinating with each other, individuals and teams give legs to the mission and move the collective toward its strategic direction. The individual contributors empower their teams and departments to propel the organization forward. Vision development is not limited to the linear process of creating a vision statement. It unfolds spontaneously, in due time, and when people engage with each other.

The Vision Journey is filled with lines and loops. Many entrepreneurs use the phrase "zero to launch," which evokes the image of a rocket ship moving in a straight line from a space center's launching pad toward the abyss of outer space. Once it clears the earth's atmosphere, the rocket's trajectory incorporates soft curves and recalibrates its position to reach the target. A trajectory that begins with a straight line moves into curvilinear patterns. Startup founders and early joiners also witness the most extreme expression of moving in curved lines. For example, 3M and Research in Motion meandered toward product launch for more than a decade. When organizations miss the target, it's important to have a process that allows team members to loop back around and try again. Enter iteration.

A loop allows leaders to revisit an earlier stage of a process and make changes with the knowledge gained from the previous loop. However, making the switch requires organizations to prioritize learning to learn as a critical management practice (Morgan, 2006). Learning to learn counteracts the strong tendency of single-loop systems to reinforce the status quo. Instead, it builds a capacity for double-loop learning (Argyris, 1997) by making room for team members to continually organize themselves. This type of self-organization allows operating norms and rules to adjust to changes in the business environment. Founders and leaders who believe in testing their vision capitalize on outside perspectives by replacing a single-looped approach with a double-loop. This improves feelings of individual and group effectiveness by giving voice to a latent but widely held belief—"it's impossible to get things perfect on the first try."

Using multiple loops of vision iteration helps teams to do things differently without scrapping the progress made and starting from scratch. The visionary leader may fly solo on the first loop of the journey. Despite its eventual ineffectiveness, single-loop visioning outlives its usefulness in far too many organizations. Although leaders may take a single loop with their senior managers, some wait years or even decades before taking a second loop with their top management team. Because a vision generated with input solely provided from the upper echelons is not truly shared, it is necessary to take the third loop with the organization at large or a representative slice of stakeholders in the case of large organizations. The second and third loops of the shared visioning process require more advanced leader agency than single-loop visioning. Taking multiple loops makes iteration possible.

Unicorns and high-growth startups use multi-loop learning coupled with multi-loop visioning. Such companies are excellent case studies for vision iteration. It's like studying a nebula to see how stars are born and then being able to track those stars throughout their life cycles. For example, unicorn startup Jet.com reached a $1 billion valuation four months after the company was founded (Fleximize, n.d.). As awe-inspiring as such stories can be, this is not the case with most unicorns.

Nine Zones of Vision Iteration

The use of a Venn diagram to illustrate the Vision360 framework includes conspicuous and hidden components. As discussed in Chap. 2, four circles represent the four phases of Vision360 Leadership. These phases are conception, adoption, creation, and integration. Upon closer examination, the overlapping circles reveal a lotus flower that contains nine zones. Each zone is labeled with a word or phrase that reflects its central activity (see Fig. 3.1). To fine-tune the Vision360 model, I pulled together three focus groups composed of professional consultants and middle managers to present the eleven principles of this manuscript. Each group expressed interest in the nine zones, especially the ninth zone located at the center of the process. I call Zone 9 the leader's sweet spot. Vision360 Leadership happens at this convergence point.

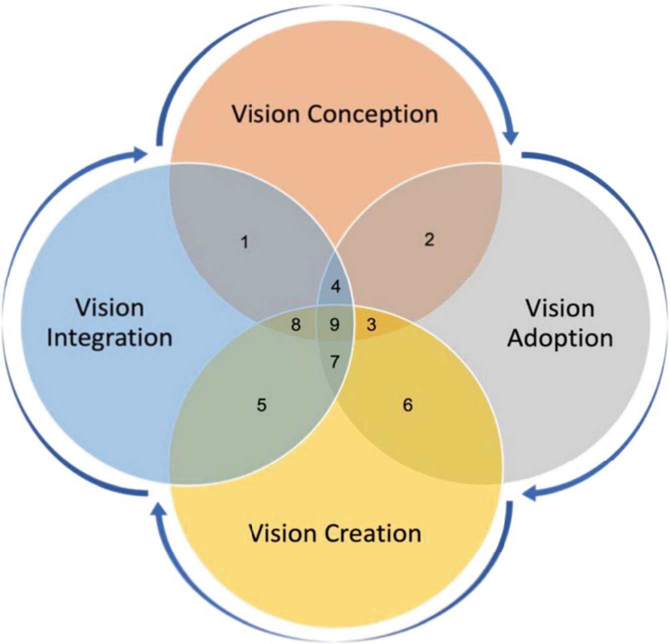
A consideration of units of analysis makes Vision360 more complex. The first question is, "Are you analyzing vision development for a startup or an established organization?" With that determination made, an analyst can look at the level of the organization in which the vision is located. Is it a vision for an entire company, a division, a functional department, or a team within that department? In most cases, founders of new organizations start in the vision integration phase of another business before having a paradigm shift and deciding to start an independent venture. Existing organizations will generally begin with an existing vision. The condition of that collective vision will determine how their journey is reflected in the model.

The zone sequence of this chapter is optimized for the best possible flow. Each zone includes a general description, associated challenges, and practical application to twenty-first-century organizations and new ventures. Chapter references are included for many of the case studies. We will now walk through each zone.

Zone 1: The Paradigm Shift (Integration + Conception)

General Description of Zone 1

When the integration phase meets the conception phase, it creates winds of change, also known as the paradigm shift. Thomas Kuhn introduced the term "paradigm change" within the context of scientific revolutions. According to Kuhn (2012), normal science has to be redefined for a new paradigm to be received. Robert Cornish, the CEO and founder of Richter, recently described his paradigm shift from a customer-first to an employee-first mentality (Cornish, n.d.). He likened it to



Zone 1: Paradigm Shift
Zone 2: Vision Search
Zone 3: Experimentation
Zone 4: Vision Emergence
Zone 5: Vision Translation
Zone 6: Crystallization
Zone 7: Transformation
Zone 8: Creative Tension
Zone 9: Optimization ("The Sweet Spot")

Fig. 3.1 Nine zones of Vision360 leadership

a ripple effect. The first ripple is supporting and investing in employees to become their best selves. This creates the customer ripple, where team members deliver the best customer experiences with top-notch services and products. The customer effect, in turn, increases organizational performance and shareholder value.

Implications of Combining Phases

If vision integration were a person, it would live at 555 Status Quo Drive. An organization's status quo is a product of vision integration activities of a previous era. Over time, an organization sets up shop in what becomes a comfort zone—and is tempted to stay there. A successful paradigm shift pulls the organization out of this rut. Like the first line of defense protecting the king and queen on a chessboard, a company culture emerges to preserve the status quo. The status quo is virtually set in stone, but it can be disrupted by factors in the business environment. Such factors often create a breeding ground for new business ideas to emerge.

A complete cycle of the vision iteration process generally moves clockwise from the status quo of an existing operation to crossroads of a paradigm shift in Zone 1. The opportunity to combine the integration and conception phases introduces difficulties. The visionary leader, founding team, and organizational culture appraise new ideas as threats to the status quo. Therefore, leaders must change how the culture perceives new ideas to avoid destroying the key to its future. Defenders of the organization's routines must avoid viewing every new idea as a potential threat while preventing external threats from ultimately destroying the organization. Blackberry resisted being pulled into the paradigm shift zone when Apple disrupted the smartphone industry Blackberry pioneered. Chap. 10 covers this case more in depth.

Application to Twenty-First-Century Organizations

New companies quickly figure out a way to survive. Their operating system becomes the proverbial *status quo* or "the way we do things around here." Every company enters a phase when the status quo is questioned—usually sparked by happenings in the business environment. But like a king at the beginning of a chess match, the well-guarded status quo has defense mechanisms to ensure its survival. If the status quo survives, it can become the guardian of the worst best practices imaginable. If leaders choose to reinforce the status quo, the organization risks disengaging or, in the worst case, losing entrepreneurial talent.

Questioning the status quo produces new ideas about how the organization should run. Such novel ideas and the associated brainstorming processes will threaten the status quo and the culture that guards it.

Potential threats can also arise from within organizations. In such cases, the culture of an established organization starts fighting a change within the organization as if it's an unmitigated external threat from the business environment. This condition often instigates a need for change. The organization then starts attacking like it has an autoimmune condition. It is difficult for teams to spot oncoming external threats while fighting a civil war.

When the VUCA environment changes the variables used to calculate the status quo, leaders face a life-or-death decision—not for them personally, but for the state of the organization and possibly their careers. Leaders face a critical dilemma: "Should we adapt to accommodate the new situation? Or should we change our business model and even our strategic direction?" Such questions have the power to stir up the winds of change. Eventually, existing organizations reach a decision point: they can continue reinforcing the status quo or decide to innovate.

Case Examples: Blackberry, Blockbuster, and Alphabet

Apple's 2007 introduction of the iPhone signaled a successful paradigm shift upon Steve Jobs' return as chief executive. Their transformation of the smartphone industry was particularly disruptive for Blackberry. Apple changed the industry standard, making the design and ecosystem of the iPhone a gold standard for the smartphone industry. Blackberry decided against translating the innovation into a companywide vision. However, their status quo became exposed by the threat of an industry shift being imposed on the company (see Zone 1). Blackberry rejected the smartphone industry direction and completed a successful paradigm shift a decade later under the leadership of John Chen.

Blockbuster's rejection of online streaming represents a failed paradigm shift. Choosing not to adapt their business model placed the former video rental behemoth in a vulnerable position. Blockbuster did not enter the paradigm shift and opted to remain in the comfort zone of the status quo. The disruption of their business model did not pose an imminent threat—until it did. It was too late to recover, and the company suffered the proverbial "death by a thousand cuts."

The nine zones do not work in isolation, and their boundaries are blurred. A successful paradigm shift, like Google's transformation to Alphabet, occurs over many years and involves multiple zones. No organization takes the exact same path. The success of a paradigm shift is not often known until the status quo can show evidence of sustainable change. To use an analogy from nature, if the caterpillar becomes a butterfly, the paradigm shift has succeeded.

Unsuccessful paradigm shifts show up quicker on the vision iteration cycle. Action and inaction stop the organization from changing its form. For example, Blackberry pivoted when a vision search was needed. Blockbuster ignored the threat of online streaming, even when allowed to experiment with such a vision by acquiring Netflix. The paradigm shift from Google to Alphabet tells a slightly different story than Blackberry and Blockbuster.

Application to New Ventures

Paradigm shifts happen differently for visionary entrepreneurs who start independent businesses and corporate ventures than for the leader who introduces a new vision to an established firm. The paradigm shift occurs in at least three startup scenarios. The first situation sounds like this. A solo entrepreneur or group of founders dreams about innovating a product or process while working for another business. Their discontentment with the status quo leads to a decision point. Eventually, they start a venture or continue with business as usual. This first decision leads to another equally important choice as the future entrepreneur asks, "Should I start my own venture or pitch my current organization on an internal venture?" This is where the "autonomy-empowerment paradox"kicks in. Their decision reflects how much control they seek over their future versus how much they anticipate their organization will empower them to start a venture without too much regulation or interference.

In the second scenario, a potential founder begins grappling with the decision to start a new venture. Before making this decision, the would-be entrepreneur is going through professional life, making decisions based on their employment responsibilities at an established company. They experience a personal paradigm shift that usually consists of wanting to do things differently, innovating, or serving a new market niche. The emerging entrepreneur can often sense a change in the business environment that calls for serving customers differently.

In the third scenario, a founding team creates an ideal, largely tentative picture of their future business. In lieu of a formal vision statement, the founders lean into their passion, ambition, mission, and sense of direction. The founding team must know whom they want to serve and how its services benefit customers. Thus, a new business's successful operation and profitability (i.e., organizational emergence) could be far ahead of the development of its shared vision. There's no company history to ground the future direction, so the tentative vision links to realities in the external environment combined with the founders' intuition formed through industry experience.

Summary

Turning a blind eye to potential threats is costly. Under the leadership of John Chen, Blackberry engaged in a paradigm shift, resulting in a renewed focus on cybersecurity. It now looks closer to what Research in Motion would have become if the company had taken a more linear path. Blockbuster chose not to engage in the shift to digital technology, which caused a seismic shift in the video rental market. Time is of the essence when engaging in a paradigm shift. The transformations of Google to Alphabet and Facebook to Meta Platforms demonstrate the timely engagement of paradigm shifts. The cases of Blackberry and Blockbuster show that downplaying potential threats costs both companies in terms of time, velocity, and market share. Blackberry won the fight for its existence. Blockbuster did not.

Zone 2: The Vision Search (Conception + Adoption)

General Description of Zone 2

Vision sprouts up on the *boundary* between *chaos* and *order*. VUCA provides the chaos. Company culture—or "the way things are done around here"—provides the order. In their book, "Facilitating Organization Change," organization development consultants Ed Olson and Glenda Eoyang proposed, "vision emerges from the space where order and disorder cross over, in the rich interplay of experiences, thoughts, and connections of system agents" (Olson & Eoyang, 2001, p. 73).

The intersection of vision conception and adoption produces the vision search—a starting point for visioning. Leaders and team members use their peripheral vision to detect weak signals within the business environment. Every vision has one or more triggers that prompt its emergence. Once the trigger prompts a vision search, visionary leaders choose how the vision is shared throughout the organization. Triggers and starting points determine the pace and overall nature of the collective vision journey.

Implications of Combining Phases

The combination of vision conception and adoption presents leaders with two challenges. First, leaders must detect the events that trigger a visionary response. According to O'Connell et al. (2011), several factors can trigger a vision search, including executive influence, life cycle factors, organization change, the founding and early stages of a startup, periods of disruptive change, and periods of purposeful planning. A vision search can be prompted by announcing a formal change initiative. Changes in an organization's status, top management, profitability, and business environment also prompt the search for a preferred future. Vision is more likely to be conceived at points that can be initiated by numerous factors related to the organizational life stage, along with anticipated or current changes. However, existing organizations may fail to enter the vision search despite the presence of multiple Vision Triggers.

Second, leaders select a starting point to find a collective vision worth adopting. Getting people on board with the shared future vision can feel like a unique journey for the senior leader. According to management expert Senge et al. (1994), shared visioning has five starting points. When short on time, leaders use their agency to *tell* followers about the vision for the company. Visionary leaders often *sell* followers on the benefits of following their preferred future. They also prompt followers to *test* or experiment with the vision. Testing the vision is Vision360 Principle 7. The test pilot is a way to decrease negative antibodies and increase adoption. More on principle seven is covered in Zone 3 and Chap. 6.

More participatory leaders invite followers to *consult* the leader on recommending a vision. Visionary leaders seldom use the most collaborative approach to *co-create* a future vision with followers. The starting points can operate in conjunction or in isolation. In discussing common starting points for the shared visioning process, Senge et al. (1994) implied that building a shared vision will take several loops. The language of former Microsoft CEO Bill Gates' now famous *Internet Tidal Wave Memo* incorporated multiple starting points. Such strategies increased vision adoption and strengthened the company's strategic position in the internet industry/market. Refer to Chap. 5 for a full explanation of the starting points (Fig. 3.2).

Vision 1.0

Here is a riddle. What does a minimum viable product, or MVP, have in common with vision iteration? MVPs and iterative visioning closely relate to the principle of minimum specifications (Morgan, 2006; Ries, 2011). Organizational scientist and complexity expert Brenda Zimmerman applied the principle of minimum specifications to visioning, advising leaders to craft a "good enough vision" (Olson & Eoyang, 2001, p. 74). By assembling a beta version of the preferred future, organizations can anticipate and accommodate change over the long term while enabling

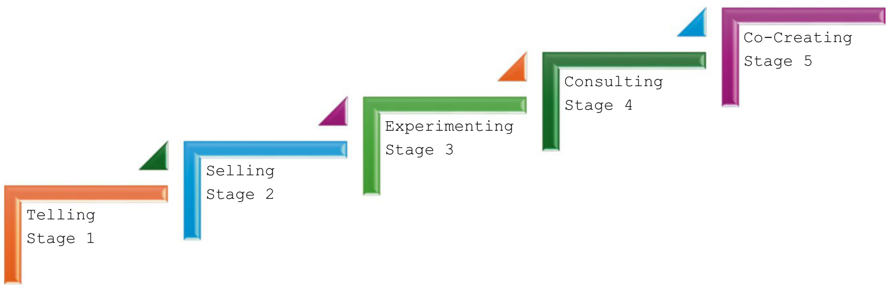


Fig. 3.2 Maturity levels of shared visioning (Senge et al., 1994)

people to self-organize around the shared sense of a preferred future. Vision iteration cycles treat visioning as an ongoing process.

Teams develop an initial vision at some point in the shared visioning process. You can call this a good enough vision, initial vision, Vision 1.0, a minimum viable vision (MVV), or any number of things. Vision 1.0 functions like the pre-release of the latest Apple or Windows operating system (OS). When organizations complete full cycles of vision iteration, leaders can upgrade the version to v.1, v.2., v.3, and so on. Searching for a vision may require fine-tuning within the same version: v.1.1, v.1.2, and v.1.3. It's not a full pivot of the strategic direction, just a minor adjustment—an iteration of the current vision.

Application to Twenty-First-Century Organizations

Existing organizations have an established way of doing business (i.e., culture) and formal statements indicating their direction. Before deciding to innovate, they scan the horizon and do their fair share of seeing and thinking. Teams that can forge a collective intelligence can see further and assemble a more granular picture of the business landscape.

Organizations use peripheral vision, which is externally focused, to zoom out from the proverbial "way we do things around here" and explore trends and possible futures. In an established organization, vision begins to emerge as rumblings of change start around the "water cooler." Employees discuss what works and what could be better. Ground-level employees are in touch with customers and sense what the market is doing. It's essential to capture these insights. Employees and managers scan the horizon and collect a lot of data. They just don't know how to use this data to help the organization. Many don't know how valuable the data is.

New organizations do not move into vision creation immediately. They begin searching for a brighter future. Founding teams have launched and run viable businesses while initiating a vision search. A founding team's first loop of vision iteration includes searching for, creating, and executing a good enough vision. The early story of 3M provides a prime example.

Case Study: Patience Empowers 3M's Vision Search

Although founded in the twentieth century, 3M's early story shows how a vision search usually unfolds. Before moving the company from Duluth to its present location in St. Paul, early investor Lucius Ordway introduced the concept of "patient money." This growth-oriented core value was embedded over 100 years ago into 3M's culture to "represent long-term investment in an idea, technology or product that shows promise, even when others argue otherwise" (3M, 2002, p. 4). This core value played out in the tenure of 3M's first president, Edgar Ober, who served 12 years as company president without drawing a paycheck.

The concept of patient money laid the foundation for organizational members to continue pursuing their shared vision even though its realization took much more time than initially anticipated. Success was not immediate, nor did it come quickly. However, the inner strengths of perseverance, optimism, and a sheer will to survive drove the founding team of entrepreneurs and investors forward.

Patience, faith, and tenacity were not the only inner forces driving the founding team's commitment to the eventual success of 3M. According to retired corporate scientist Roger Appeldorn, company president Edgar Ober had "a clear vision that 3M could be built on manufacturing abrasives when the United States was becoming an industrial nation. If he hadn't been bold and courageous, 3M wouldn't exist today" (3M, 2002, p. 4). This clear vision persisted amid countless obstacles that could have derailed the company during its startup phase. The scope of its preferred future was broad enough to last for decades, and the ensuing cultural values endure to this day, but not without overcoming much adversity. 3M was driven to ultimate success not only by the clear vision of its leader Edgar Ober but also by the core value of patience modeled by Ordway, its investor angel, which led the company to a hard-won victory.

Ober expressed 3M's long-term aim, but the organization was arguably engaged in a vision search for over a decade. Their vision, which centered on mining and manufacturing, continued well after the United States' industrial age peaked in the mid-twentieth century. Yet, 3M lives on. The founders of 3M pursued success during a series of false starts in the early twentieth century. The story of 3Ms. early days illustrates the search for a vision—a principle put into action by co-founder Edgar Ober.

Summary

To optimize progress, leaders cannot treat buy-in as an afterthought. Instead, they should build it into the visioning process. This happens through intentional shared visioning that often produces an initial vision. So, what does a visionary leader do with Vision 1.0? They move to the third method for shared visioning and experiment and put it to the test. One of the first tests is whether the organization will accept or reject the new idea. This section listed five starting points for a leader to engage team members in shared visioning. One of those starting points has gained popularity in the last 20 years.

Zone 3: Experimentation (Conception + Adoption + Creation)

General Description of Zone 3

Quickly ask yourself, "What are the minimum specifications needed to get started and test out our vision? The answer is the difference between the push and pull of perfectionism and the gratification of "good enough." Brandon Kearns warned against iterating products for the sake of iteration and without an overarching vision. In *Zone 3*, teams begin assembling and experimenting with Vision 1.0.

The tech industry—and agile methodology, in particular—has changed the ways entrepreneurial teams develop ideas of all sizes. Startups develop differently than existing businesses (Blank & Dorf, 2020). As startups search for a business model, team members put vision to the test. Eric Ries' and Steve Blank's work on the lean startup and Jean Liedtka's work on design thinking have changed the game for innovation leaders. This book highlights the relevance of practices such as experimentation for twenty-first-century visionary leadership.

Implications of Combining Phases

The vision may be emerging at the fringes of the organization or industry or around the watercooler, but the leader should use their agency to unfreeze old ways of doing things (Kurt Lewin's change model; Edgar Schein's explanation of how cultures form), signaling a change to the status quo. The vision search begins, and the team starts pondering, "What if?" It's better to discuss scenarios together in a concerted effort than for the leader to let folks do this alone and with what will turn into reckless abandon if they smell change in the air.

Application to New Products and New Ventures

Not only is experimentation a design thinking technique, but it is also a common starting point for shared visioning. So, vision searches often start here. 3M and other established companies have institutionalized experimentation in response to an overarching, formalized vision for innovation and change. This is where research and development (R&D) comes into play. Not every established company institutionalizes innovation effectively. Preserving spontaneous creative moments leads to the discovery of the next revolutionary invention. 3M learned this lesson during Jim McNearney's Six Sigma initiative and Sir George Buckley's integration of Six Sigma's efficiency practices with the existing culture of spontaneous innovation.

A minimum viable product requires a minimum viable *vision*. The type of product is not limited. It could be a change initiative, a new department, a novel product or service, a culture, or the entire company. Regardless of the product, your people need a vision that is good enough to test. They need Vision 1.0. Just remember, an MVP requires an MVV. Chapter 6 discusses the connection between initial visions and minimum viable products, go-to-market strategies, and validation.

At the project level, intrapreneurs often combine their intuition with data from customer insights and interactions with their customer base. They quickly assemble an idea to give direction to a project and generate buy-in up and down the chain of command and from their customer base. Chapter 9 discusses how Dina Campion, a Starbucks general manager spearheaded the development of the Frappuccino using this method. What eventually turned into a star product for Starbucks emerged as a response to a practical customer need. The team piloted the product at one location and expanded to include more restaurants. Starbucks carefully piloted the Frappuccino for similar reasons that drive established organizations to spin out a new venture: to minimize risk. Such innovation leaders guide their teams to start testing in the marketplace. Realities in the external environment, like funding sources, market trends, and customer preferences, shape the final product. Internal dynamics, including the leadership team's experience and employees' skills, will also influence the team's velocity toward their preferred future. More established companies face similar challenges to those faced by popular restaurants. They must experiment while asking, "How do we scale without changing the recipe?"

In Zone 3, visionaries initiate their vision search using experimentation. To a founder, testing their vision can be seen as giving up too much control of their business too soon. In this case, using control variables in experimentation can be helpful. It gives the founder a say in which factors their team can change versus what should remain constant. When teams begin testing their vision, using a control variable preserves and repurposes a founder's sense of control as an asset instead of a liability.

Case Examples: Growth Through Experimentation

The *innovation culture* of 3M gave rise to experimentation. Its product portfolio contains inventions that started as experiments made possible by well-funded research and development. 3M's most notable inventions include Post-Its and Scotch tape—two items that have become commodities in the global workplace. Such inventions fueled 3M's growth by creating markets for products consumers didn't know they needed. Such strategies include acquisitions and spinoffs. Companies like 3M and Starbucks tolled out and scaled the inventions, multiplying their investment into employee creativity. Such companies create a market by meeting the need for a product that people want and are willing to pay for.

Acquisitions function as a type of experiment when considered within the context of vision iteration. The high volume of acquisitions by technology companies like Microsoft, Alphabet, and Meta Platforms gave off what management experts George Day and Paul Schoemaker called weak signals of change on the strategic landscape. Acquisitions help smaller companies to scale and big tech companies to sustain their position as market leaders.

Summary

Teams search for a vision by testing out new ideas. Piloting new products with minimum viability gives customers and other stakeholders space to offer valuable feedback. Experimenting validates the necessary components of a collective vision and channels employee and customer creativity toward an emerging vision.

Zone 4: Vision Emergence (Integration + Conception + Adoption)

General Description of Zone 4

Many times, experimentation goes awry. Things don't work as intended. As we will see with the Frappuccino in Chap. 9, experiments can pop off better than expected. Think about it. The Frappuccino idea worked so well that it helped Starbucks to popularize cold coffee drinks across the industry. A product vision can ignite innovation across the entire organization.

The makings of vision emerge in the backdrop during a paradigm shift in Zone 1. It starts to break out in obscure and unexpected ways on the periphery, at ground level, and in customer interactions. Team members usually detect these weak signals long before their leaders. It is all a part of vision emergence, which rises to prominence in *Zone 4*.

Implications of Combining Phases: Antibodies

The age-old challenge of innovation and visionary leadership and culture is to stop organizations from attacking new things. Any vision, change, and strategy derived outside of a shared process will meet significant resistance from at least one group of stakeholders, and their culture will view the new thing as a foreign substance or an antigen. When this happens, the organization unleashes antibodies that have one job—to find creative, innovative, and visionary ideas and stop them before they disrupt the status quo or "the way we do things around here." Visioning happens in a complex system. When viewed through the lenses of complexity theory and systems thinking, vision is emergent, unstable, tentative, and elusive (Davidson, 2005). Vision emergence helps teams to lean into complexity and make the most of situations that are hard to control. Because of their spontaneity, activities such as creativity, innovation, and visioning fit the bill.

What can leaders and followers do to give new and visionary ideas a fighting chance? First, leaders can teach organizational members to see new things differently. Second, visionaries can orchestrate the emergence of a new vision from the organization's culture. Vision is the crucible that mitigates the impact of VUCA on the organization. Shared visioning brings the future into the present. Visionary organizations use foresight to anticipate uncertainties, explore alternative futures, and reduce negative impacts. This type of learning happens better in group settings where participants bring the future into the present. Group sessions are containers for brainstorming and creative strategies to capture shared knowledge. Getting team members on board early ensures the success of your vision. Early adoption begins here and now, but only if you seize the day with creativity and design thinking strategies. Chapter 7 addresses this challenge in depth.

Application to Twenty-First-Century Organizations

In one of the V360 focus groups, a participant had an "aha" moment after hearing the research question of this book. Chapter 1 asked, "Can an organization learn to see?" In Zone 4, we ask, "Can an organization learn to *hear*?" First, a team learns how to see the future together. Then, it learns how to hear differently. Learning to listen is directly related to the user experience (UX). Apple became the world's first trillion-dollar company by harnessing the power of the user's experience. Starbucks created a market for iced blended coffee drinks by learning to listen to its customers. The Frappuccino provides a prime example (Chap. 9). Vision emerges in containers, which are spaces or contexts with boundaries that separate them from other spaces. Chapter 7 contains a full list of containers for vision emergence.

Summary

Organizations conceive, create, and adopt preferred futures through vision emergence. Orchestrating vision emergence minimizes the misuse of organizational antibodies. Vision emergence helps avoid unleashing antibodies against a viable, tested, shared vision. The vision is not regarded as an external threat imposed from the business environment or an internal threat penetrating the defenses of immunity.

Visioning is more impactful when treated not as a standalone activity but in the context of the foresight process.

Zone 5: Translation (Creation + Integration)

General Description of Zone 5

How does translation apply to vision? When it comes to vision, what are we translating? In language, translation involves converting a message from one language to another. Leaders use data to make the big picture more granular. Visionary organizations transform bits of data into information, knowledge, insight, and wisdom. A visionary leader puts this granularity to good use through storytelling. By painting vibrant pictures, leaders attune their team members' emotions and expectations to see themselves as part of the organization's preferred future. The vision manifests in new ways and means different things to specific individuals and workgroups.

Implications of Combining Phases

When people from two countries meet, their cultural nuances will differ. If the two countries speak different languages, the two people will have to overcome language barriers. In organizations, each technical role is a part of an occupational culture. Coders, accountants, and sales associates have a particular vocabulary. Middle managers and executive leaders have unique lexicons and behaviors that shape their speech patterns. Functions such as strategy, culture, structure, HR/talent development, leadership culture, finance, and marketing have different ways of using language to make meaning.

Language barriers exist between occupational cultures. Every function, role, and business system has a slightly different way of using words to make sense of the world around it. Encoding vision into the collective language enables organizations to remove the barriers. Infusing corporate language with representations of preferred future accelerates the pace at which team members can learn to see together.

Application to Twenty-First-Century Organizations

When a new vision or change is introduced, every employee listening wants to know, "What does this new vision mean to me? What does it mean *for* me? For my job? For my team?" Figuring this out does not happen in top-down communication settings. The back-and-forth sensemaking process happens in continual, spontaneous conversations during the workday. Translating high-level language into strategic, operational, and tactical language happens best in social settings, especially group processes. The goal is to bring vision into the present through language. Doing so helps teams and individual contributors to answer the questions, "What does this vision mean to me? What does it mean for the work we do together?" It is vital to encode the vision into the shared vocabulary of the organization—from 30,000 feet to ground level. Only then can every part of the organization reflect the vision for the whole.

By testing vision on the ground level, a team finds what works. Work sessions help teams to translate the vision into strategy. Eventually, the initial vision is codified into a vision statement. Leaders talk about new values and behaviors to support vision realization. Human resources departments call organization development experts to realign the culture and operations with the new direction. Managers plan to reward the behaviors you want to see. Such alignment makes it easy for employees and managers to make decisions in the direction of the vision. Change is the name of the game. Before long, the entire organization has updated its operating system with many interdependent components to sustain necessary changes.

Case Examples: Growth Strategy

While helping a diversity, equity, and inclusion consulting firm define its values, I realized that different words mean different things to different people. Such is the case when translating vision into growth strategy. Vision translated into self-funded, organic growth during Spanx's early phase. In 2021, Blackstone increased Spanx's value to $1.2 billion after purchasing a majority stake (Lakritz, 2024). Tesla used foresight and innovation management to further its mission while dismantling barriers in the electric vehicle (EV) industry. Tesla has used its positioning in the electric vehicle (EV) industry to become a trailblazer in the energy sector. Without the type of visionary leadership of an industry leader like Elon Musk, the EV industry would have been stymied indefinitely and held captive to regulatory challenges without much hope of escape. At Facebook and Google, it meant acquisitions and eventual reorganization. BB&T and SunTrust banks decided to merge to create Truist and strengthen their position in the financial industry. Blockbuster's decision against acquiring Netflix was an early signal that it had chosen a defender strategy over a growth strategy. Hindsight turns to insight when considering Blockbuster's failure and Netflix's pivot to digital following the failed acquisition. After establishing itself as a social media pioneer and industry leader, Facebook's growth strategy translated into acquisitions of Instagram for $1 billion in 2012 and WhatsApp and OculusVR in Q1 of 2014. In 2021, Facebook' reorganized and changed its name to Meta Platforms to strategically reposition itself at the forefront of Metaverse. Amazon's growth strategy revolved around diversifying its product offerings. Microsoft partnered with IBM, a globally renowned industry titan. These examples show growth means different things at different companies.

Summary

The vision is translated into everyday language as it moves through the organization like droplets of H_2O through the water cycle. Cascading vision from the top to lower tiers of the organization represents one way a strategic direction moves throughout organizations. Vision moves in many other directions before it becomes widely accepted. Translation is where the vision is encoded into the communication patterns of stakeholder groups. They will use a slightly different vocabulary to communicate their thoughts. The functional area of the team determines their word choice. When a collective vision is translated, each stakeholder group learns to speak their dialect of the organization's language. A vision that reflects stakeholder perspectives replete with current realities and latent aspirations can be translated into action. The stakeholder influence pulls vision out of the sky—out of the future—and makes it relevant to solve problems.

Zone 6: Crystallize (Adoption + Creation)

General Description of *Zone 6*

When a substance crystallizes, it takes a definite form. The arrangement of atoms and molecules becomes well defined as the substance changes from liquid to solid. Liquid water crystallizes to form ice or snow when at or below its freezing point. Carbon crystallizes to form diamonds over long periods and when subjected to intense heat and pressure. Ideas about the future crystallize to create a vision. Zone 6 is where vision becomes more apparent and takes a more organized form.

The purpose is to create lines of sight (Chap. 1) throughout the organization. Each department and team has a unique point of view. Each leader, manager, and individual contributor view the organization from a unique vantage point. An individual's location and role in the company combine with individual factors to determine what they see. No two perspectives are the same.

Implications of Combining Phases

Visionary leaders can rush the journey to reach Zone 6. A vision conceived and shared in a time crunch, crisis, or emergency is more likely to rush the process. These high pressures often cause leaders to dictate or tell the vision to followers. I understand time does not always allow for collaboration, but here's where telling vision gets dicey. When leaders force change and hastily turn vision into concrete plans, they ultimately drive their ventures and new projects into what I call the Adoption Pit (see Chap. 5). This is a place of no return. The vision ends up in the Adoption Pit because leaders have not built the momentum in earlier stages for team members to accept the vision as their own. Why not? The starting point didn't leave enough time to build momentum. In startup terms, there was not enough runway.

Because of a lack of participation, the vision fails to reflect the unique perspectives of a critical mass of followers. By the time most leaders realize the error of their ways, it is too late to salvage the vision. Even if they could pull it out of the pit, their decision to force change has likely broken the trust of their followers. The trust must be rebuilt before people take the leader's attempt to collaborate with them seriously. Without this critical step, followers will be cynical or hesitant at best. Leaders who create a line of sight help their team members to feel seen.

While rebuilding trust for the next vision iteration cycle, leaders should assess the preferred future they previously imposed on their team. They should consider the future, asking themselves, "How much does the vision reflect my followers' perspectives? Can they see themselves in this future? Does this future relate to them? If so, how?" A vision that reflects stakeholder perspectives can be successfully translated into action. Such a vision provides a high-level solution for their current realities and deeply reflects their latent hopes and dreams. The vision is reflected in every corner of the organization.

The pitfall of rushing to Zone 6 is ending up with a concrete plan instead of a crystallized vision. Concrete plans are inflexible and set in stone. Crystalized plans reflect the values and the vision of the organization. They are plans you can see your vision through. A leader should avoid pouring concrete. Instead, they should send vision through the fire to see how it performs under conditions of high heat and intense pressure. This will shed light on its potential usefulness to internal and external stakeholders. Visions characterized in this way will likely steer clear of the dreaded Adoption Pit.

Application to Twenty-First-Century Organizations

The translation of vision into strategy lends itself to water-related analogies: cascades and cycles. The vision cascade process starts in Zone 6. Cascading includes translating vision into objectives, strategies, goals, and tactics. Executive leaders and middle managers translate the company vision into departmental visions for their units. This gives the vision mobility. As it is translated, the vision is crystallized as it becomes more granular. The small “v” vision reflects the big “V” vision when the two visions are held up to the light. The vision is not only translated—but it also turns into suborganizational visions that reflect the overarching vision. Suborganizational visions and small “v” vision are prominent in Zone 6. The initial cascading process is not continuous. The measurement and evaluation of progress continue throughout a vision’s lifecycle.

The vision communication cycle resembles the water cycle. Within a hierarchical or pyramid structure, top-down communication resembles the downward motion of water via precipitation, deposition, and percolation. In the water cycle, bottom-up processes transport water through evaporation, sublimation, condensation, plant uptake, and transpiration. In vision communication, individuals carry new information to their managers, who transmit it further up the chain of command. In a decentralized or networked structure, communication moves horizontally from the network hub to the fringes of the organization and back again. Information flows back and forth in omnidirectional patterns as part of the vision emergence process. The vision communication cycles ensure the collective vision is dispersed in countless ways throughout and beyond the organization.

Cascading Vision During the cascading process, leaders translate the vision into specific goals or objectives for the organization’s departments and teams. Foresight expert Andy Hines uses the terms big “V” vision and small “v” vision to differentiate between the two. A diversity of perspectives among the small “v” vision adds layers of richness to the overarching vision. There is unity in this diversity as each point of view reflects the big picture. This approach creates lines of sight throughout an organization. Individual contributors who work in sales, human resources, and finance begin to see how the vision impacts their jobs. When properly crystallized, managers can help their teams determine how the vision will reshape their work tasks.

3M provides a prime example of translating innovation into employee and manager behaviors. Because of their commitment to research and development, 3M institutionalized innovation without stifling employees' creativity. Managers reward innovative behavior and recognize the "well-intentioned failure" associated with an entrepreneurial mindset (Leavy, 2005). Policies such as the 15-percent rule allow employees to dedicate this portion of their time to personal passion projects and preserve the innovation, visionary, and entrepreneurial nature of the culture. 3M empowers its employees to use their creative skills for innovation.

Summary

Translating the big picture into behaviors and decisions is a product of Zones 5 and 6. When vision is translated, it can be heard. When vision crystallizes, it can be seen. This is the significant difference between Zones 5 and 6. A crystallized vision is reflected throughout the organization. It also mirrors the vantage points of various departments, teams, leaders, managers, and individual contributors. Rushing the crystallization process is a major pitfall leaders face as they approach Zone 7.

Zone 7: Transformation (Adoption + Creation + Integration)

General Description of *Zone 7*

"You reap what you sow." What a common statement. Let us rewind to fully appreciate it in the context of the nine zones of Vision360. A leader has a vision of a better future. Immediately, she is faced with a dilemma. She can tell her vision to her employees and demand compliance. While crises dictate speedy solutions, the telling approach goes against the inspirational nature of vision. Alternatively, she could sell her employees on the benefits of adopting her vision. This approach works better than telling but still misses the mark. She knows the other three options—inviting her employees to experiment, recommend (consult), or co-create a vision—will mean death to her vision, at least for a while.

Every founder's dream boils down to one thing: success. The path to success will vary, but one thing is sure. The leader encounters resistance to their initial vision somewhere in the middle of the development and realization process. To force employees to implement the vision as is would be a mistake.

Vision is a seed. According to the laws of nature, seeds must die or become latent before traveling the long road to fulfillment. This happens with collective and individual vision. Author and leadership expert Jim Kouzes puts it like this: "Vision becomes latent in the hearts of the people." Employees and team members have dreams and big ideas lying dormant due to neglect. If a visionary leader can put their vision aside for a season and activate the vision of their people, they reap dividends many times over. In essence, this leader trades spaces by prioritizing their people's individual visions and trusting the people to do the same thing for the leader's vision for collective success. What started as the leader's vision slowly and then suddenly morphs into something more successful than the leader's wildest dreams. Together, leaders and people have transformed the vision into reality while being transformed themselves.

Transformation is supernatural. It does not follow a recipe. Human beings cannot produce it, and leaders cannot rush it. Even when we let nature take its course, there is a point where transformation transcends human control. For transformation to occur, a new being sprouts from the old shell. In germination, seeds contain the sprout that, with time and development, becomes a plant or even a tree. In metamorphosis, the caterpillar turns into a chrysalis. Paul, the apostle, warned of deceptive transformation, which changes the physical appearance without undergoing the inner work of fundamental change (2 Corinthians 11:13–15). This pseudo-transformation applies to organizations that appear different on the surface but, upon closer inspection, have not changed their way of thinking. This pseudo-transformation is incomplete and unsustainable.

Implications of Combining Phases

In paradigm shift mode, leaders must unfreeze their organization's immunity to external and internal threats. This prevents the organization from extinguishing new ideas and the creativity that produces them. The transformation zone takes the act of unfreezing a step further. Kurt Lewin's unfreeze-change-refreeze model for organization development becomes paramount. Leaders unfreeze the status quo, make changes, refreeze, and follow-up with continuous improvement. The organization's vulnerability levels temporarily increase, so leaders must prepare their team members to unfreeze and make changes. Leaders, managers, and employees must also understand the "why." Why are the changes necessary? What will change? What will stay the same? These questions must be addressed to help team members transform their change resistance into readiness—they are two sides of the same coin. Group processes around strategic foresight help to increase readiness and understanding by turning the organization inside out. If leaders fail to unfreeze immunity at the right time, internal conflict will likely arise as the organization turns on itself.

Application to Twenty-First-Century Organizations

A transformation looks different in existing organizations than in emerging organizations. In an existing company, talent, organization, leadership, culture, and systems must be optimized to support the new vision—or it will roll backward into the Adoption Pit. Leaders unfreeze the status quo to accommodate a new flow of ideas and operations brought about by the cascading vision. Organization development and change management principles work in tandem to create an environment for followers to make decisions that align with the new vision. Leaders and managers work to define the new behaviors, systems, and strategies that will make these decisions easier to make. The team members who can promptly adopt these behaviors may be retained. Employees who cannot adapt to the new business environment will be returned to the job market.

Technology has disrupted every industry over the past few decades. The business world has witnessed the rise of online platforms like Facebook and Google and their restructuring into parent companies Meta and Alphabet, all within a generation. The advent of artificial intelligence, virtual reality, and machine learning has prompted companies to integrate these realities into their preferred futures. In the early 2000s, Blockbuster decided against a digital transformation when it declined the acquisition of Netflix. Leaders of 3M and other enduring twenty-first-century organizations have learned from Blockbuster's decision not to accommodate unavoidable shifts in technology. Digital transformation and AI integration mean the difference between victory and defeat.

Vision crystallizes into culture The proverbial iceberg analogy has become a universal symbol for company culture. A closer look will reveal a surprise hidden within the iceberg—the crystallization analogy. When water reaches its freezing point, it crystallizes into a solid. Vision also takes a definite shape in the form of strategy, culture, operations, and finance. Crystallization of vision depends on human agents making sure employees' decisions and everyday behaviors align with the vision and support its realization. Managers who reward behavioral change in the direction of the preferred future will further crystallize and embed the vision into the culture.

Application to New Ventures

Startups and new ventures face slightly different challenges. Early teams build the organization from scratch. At the beginning stages, they test out the vision of the founders. So, their overall vision iteration cycles can be shorter. Startups constantly iterate their product and will often pivot at least once (see Chap. 6 for Ries' Ten Types of Pivots). To close rounds of investments, founding teams race to find and produce their minimum viable product (MVP) and find product-market-fit (PMF). Established companies routinely engage in sales, marketing, and business development. Startups, especially those in emerging industries, work to develop markets and customers. At present, artificial intelligence, machine learning, and cryptocurrency represent those types of emerging industries and market spaces.

Summary

Twenty-first-century visionary leadership intersects with organization development, change, and transformation in Zone 7. Transformational change is disruptive and discontinuous when compared with continuous improvement initiatives. Restructuring is a type of disruptive change and often a visionary move. Alphabet and Meta serve as examples. Leaders of established and emerging organizations face the challenge of their organization becoming something else. This is how startups become unicorns. This is how corporate behemoths become industry innovators. The process is by no means linear and takes more time than anticipated. Patience and endurance are required to develop the organization into what it will become. This is where culture, strategy, talent, leadership, and organizational development come into play. Zone 7 is the epicenter of transformation and growth.

Zone 8: Creative Tension (Creation + Integration + Conception)

General Description of Zone 8

Industry disruption is a source of tension for existing organizations. The emergence of disruptors like Uber and Vizio foreshadows future trends in the industry. They pull industry dominators to become better versions of themselves. Established organizations will likely examine their internal strengths and existing capital in the process. What they have determines how they rise to the challenge the disruptors present. The very existence of disruptors triggers paradigm shifts, vision searches, design thinking, and experimentation at the headquarters of corporate behemoths. Strategic foresight helps followers to see the need for change and innovation. Strategic thinking allows them to see how to meet the moment and respond to the need. Design thinking practices encourage visualization, experimentation, and rapid prototyping to create something new. Using the art of self-disruption, industry dominators like Google and Facebook used an array of existing capital to reposition themselves at the forefront of emerging market spaces. But one must wonder, “how?” Disruptors and drivers of change create a push and pull between an organization’s vision and the status quo. The critical task is to turn this emerging gap into creative tension.

Industries can be disrupted by startups with new technologies like Tesla, SpaceX, and Vizio. Global wild-card events like the COVID-19 pandemic and lockdowns can also prompt leaders to reshape industries.

Implications of Combining Phases

A person who views their current reality negatively will focus on challenges and what is going wrong. Sprinkle in the motivations of an action-oriented leader, and suddenly, the situation is rife with opportunities to solve problems. Using a tool like CCI Professional’s organizational mastery model, leaders can take an appreciative approach and bridge the gap between current and new realities. CCI senior consultant Lourens Delport recommended thinking about the current reality in terms of existing human, financial, operational, and relational capital (Delport, 2020). Leaders help their teams cross over to the new reality or vision using change leadership, purpose, culture, strategy, succession, and organizational infrastructure.

What happens when vision integration meets conception? Management expert Peter Senge coined “creative tension” to describe the interplay between the vision and the current reality. The vision is where the organization wants to be in the future. The current reality is composed of where the organization is and what it has right now. When a visionary leader has a future-altering idea, they will be tempted to single-handedly create a vision. Leaders are advised not to yield to this temptation and to involve their people. Who is involved in vision creation depends on factors such as the age and size of the business. Instead, founders, CEOs, and visionaries should let vision conception do the heavy lifting to produce a vision search. Why is this process recommended? In established organizations, employee behaviors and leader decisions have been optimized to bring a now outdated vision to fruition. When a leader projects those behaviors onto the horizon of the strategic landscape, it becomes clear that those behaviors do not align with the future success and longevity of the organization. In this case, conception tugs on the organization's status quo to pull it out of integration mode. Refusing to reengage in the conception phase is a sign the organization's immunity to threats is invariably frozen. The organization has a protective, invisible force field surrounding it. I've never seen a force field in a science fiction movie that an enemy has not breached eventually. Such is the case with industry disruptors. Ignoring the introduction of creative tension within an industry has a high cost, the greatest of which is timely innovation.

Application to Twenty-First-Century Organizations

Conception turns established organizations inside out and pulls the team out of integration mode as leaders and team members collaborate to challenge the status quo. This is where companies begin to unfreeze their ways of thinking, just like change managers unfreeze an organization's operating system before making changes. Allowing thought patterns to become more fluid ensures the resulting actions are made in the direction of the vision. Leaders must encourage different ways to think about the same old problems their team has encountered for years.

Established organizations move from the Integration Phase of the Vision360 framework to Zone 8. Executive leaders must decide whether to adopt innovations and new technologies that sweep through their industries. Sometimes, they get it right. Other times, denial or delayed decision-making causes leadership teams to miss the chance to turn emerging threats into a window of opportunity. The Blockbuster saga proves market opportunities have a shelf-life. Delaying critical decisions—from product-related pivots to full strategic reorientations—has caused great organizations to miss the window of opportunity and lose market share.

Case Example: Decision latency Approaching the business environment with a sober perspective gives leaders a head start to accurately assessing creative tension. Such analysis does not happen in a vacuum. Using foresight helps teams detect potential disruptors and avoid being blindsided by changes in the business environment. Using foresight would have helped Blackberry minimize the high costs of decision latency and optimize the timing of leadership decisions. These high costs materialized in time, money, market share, and stock price. Let's recall the five starting points and ten triggers from the vision search in Zone 2. The earlier the triggers are engaged, the more time leaders have to use advanced starting points. The more they can engage their people. The more options are available to them. Because Blackberry failed to do this promptly, the business evolved in a different direction than the industry it pioneered.

Blackberry is in a state of becoming—in a state of transformation. It is becoming a fundamentally different company in its second loop of vision iteration than in its first loop. In Loop 1, Blackberry was an innovator. In Loop 2, it became a laggard. We shouldn't count Blackberry out. Veteran organizations like March of Dimes and Alcoa show that enduring companies often undergo a strategic reorientation to survive. Watching Blackberry's decade-long recovery from decision latency is like watching a trout swim upstream. The former smartphone giant is moving against the current of the cascading industry revolution. If it can make it upstream, Blackberry can ensure its legacy stays alive for future generations.

Blackberry should have engaged in a vision search earlier in its journey. Instead, the company pivoted away from its core business as Apple disrupted the smartphone industry Blackberry pioneered. A vision search in an existing organization is preceded by a paradigm shift mixed with a reassessment of creative tension, giving new developments on the horizon in the business landscape—especially in one's industry, in the case of Blackberry.

Application to New Ventures

Startup founders toy around with the idea of starting a company long before they decide to incorporate. Most of them are working another job and starting businesses on the side. Others are terminated or laid off, which makes their minds up for them. Others want to do business their own way, or at least in a different way than their employers. There are countless reasons. Here's the point. A founder's former status quo is deeply connected to their old job. When they decide to start a company, there is no precedent for that entity. And we all know that the actual status quo of a new venture is chaotic. The trajectory is from chaos to order. They are making sense of the market conditions and creating a company culture from scratch—importing desirable values and behaviors from their previous employers. They either nix or transform the undesirable parts of the culture into something more like they would like for it to be (or have been). Again, startups move from chaos to order.

Case Example: Uber's Pandemic Pivot In a new venture, creative tension is on display when deciding to pivot. When COVID-19 broke out in 2020, the rideshare industry faced a dilemma. People were not traveling as much due to lockdowns. No public company likes to see its stock reach terminal velocity due to freefall. Especially when other options are available. Uber performed a move that has since been dubbed "the Pandemic Pivot." People were now working from home and staying home more. Restaurants were losing money. Uber stepped up its delivery services and slightly disrupted the delivery space. So now, Uber is a leader in the rideshare industry and has entered the delivery industry with a competitive edge: a pool of drivers ready to transport orders. Due to the pandemic, Uber and Lyft felt a sense of urgency leaders of Blackberry did not feel when Apple introduced the iPhone. That's the difference between a trend and an external disruptor or black swan event like COVID-19. Trends may or may not disrupt a company. A black swan event may completely disrupt a company's business model. For a complete list of megatrends and disruptors, see Chap. 4. A successful vision emergence and experimentation process often involves at least one pivot. Pivots are not iterations or Vision Searches (Zone 2). The ten types of pivots are discussed at length in Chap. 6.

Summary

In Zone 8, vision meets reality. The creation of a dynamic vision produces creative tension with the status quo. Creative tension is not created equal, and a startup's journey looks different from an existing organization. Leaders should tap into their team's creativity and empower members to make principled decisions that drive their daily work activities. Creative tension will eventually lead to a paradigm shift or a pivotal moment when fully explored.

Zone 9: Optimizing Velocity for Vision Iteration

General Description of Zone 9

Scaling leadership ability at the pace of company growth is imperative for leaders of fast-growing companies. Achieving such scale creates what investor and serial entrepreneur Paul A. Claxton calls "perpetual velocity" (Claxton, 2018). Leaders who optimize and sustain velocity are not easily replaced. Steve Jobs' encore performance at Apple catapulted the company to heights unseen. Bob Iger was rehired to recalibrate Disney's strategic direction, reignite growth, and reevaluate the succession plan (Murphy, 2023). It is impossible to ignore the multiple reprises of Howard Schultz to remind Starbucks of its true north, attune the vision to resonate with team members, and align resources to support the mission. Let's not forget the most recent attempt to oust OpenAI founder Sam Altman and his team's response to get him reinstated. Leaders who use their vision to bring out the best in others develop leaders into followers, thus making themselves nearly irreplaceable.

Zone 9 is the hub of the Vision360 model. This zone is contained by the intersection of the leader agency and self-organization curves of the Vision360 model (see Chap. 2 for the diagram). All four phases and nine zones of the Vision360 framework converge here. The visionary leader should maintain overlap between the four phases and ensure the zones achieve equilibrium. As the architect, orchestrator, and owner of the Vision360 process, a leader can guide the vision iteration process over long periods of time, in multiple directions, and using countless leadership approaches. As cultural architects, early leaders leave fingerprints on the future of the business to a greater degree than their successors. They work with their teams to ensure people operate those nine zones to shepherd the vision to fulfillment. Leaders guide the vision iteration process from Zone 9. This *zone* is the leader's sweet spot.

Implications of Combining Phases

An executive leader's most crucial challenge is to create, sustain, and optimize velocity. If they can optimize velocity, the organization can complete an entire cycle of vision iteration. (Remember the loops described at the beginning of this chapter?). Organizations realize their visions when leaders balance the use of their agency with emergence and self-organization. This section will continue discussing the concept of follower-focused leader agency, which began in Chap. 2.

Integrating Leader Agency and Emergence for Vision Iteration Leaders can use their agency for any number of activities. In twentieth-century visionary leadership, a vision emanates from the individual leader who imparts it to others (Van Knippenberg & Stam, 2014). This is true in many early-stage startups bootstrapped by a Founder-CEO. That visionary leader owns a vision that deeply reflects their personal core values (O'Connell et al., 2011). This usually looks like a desire to have autonomy, be innovative, or do things differently. Each desire is a starting point for visioning, but in order to scale, a founder's vision inputs should evolve along with the organization. It evolves into a vision to serve customers' needs more creatively and effectively and then matures to include a vision for follower development and community impact. Ambidexterity and omnidirectionality should characterize the purview of the founder. Being too focused on operations and tactics can turn into myopia (i.e., near-sightedness). Overemphasizing the big picture can turn into hyperopia or far-sightedness, and details fall through the cracks. Founders must develop a wide cone of vision and use peripheral vision to scan the environment. They must be able to switch to focal vision and home in on details, zooming in and out as needed. Most importantly, founders learn to navigate the autonomy-empowerment paradox.

Orchestration When leaders orchestrate, they design and optimize an organization's systems to produce the best possible results. Each system resembles the page of a blueprint for a new structure. The visionary leader designs the systems to work together to create the desired effect. The visionary leader writes the score, arranges the instruments, and directs the work. They have a picture of the outcome in mind to guide them. They know how the final product should look and sound. They also know how they want people to feel when they experience their masterpiece. So, they orchestrate the work to achieve the desired user experience.

Like bass and treble clefs on a music score, the vision of the future provides a frame of reference. This frame allows musicians to read and play the notes, and the conductor can direct or guide the group. Despite their length, whole, half, and quarter notes are placed on the staff in relationship to this framework. Similarly, the orchestration and empowerment curves of Vision360 function as an infrastructure for the Vision360 model. Phases are like notes—the building blocks of harmony. They can be combined to produce something new, like chords and intervals. All activities a leader takes in Zone 9 happen in relationship to the interplay between orchestration and empowerment.

Empowerment Just because work is orchestrated does not mean the masterpiece falls into place automatically. Just because people have great talent and skills doesn't ensure a superior product. Just because folks know what to do doesn't mean they are free to make decisions. Empowerment does just that. It shares decision-making power with people all the way down to ground level. Innovation leaders like 3M optimize their culture and employee reward systems to consistently empower followers to spontaneously produce breakthrough ideas.

Musicians are empowered when their conductor shows them how to make the music come alive so that the audience can feel the notes on an emotional level. This is deeper than alignment with a strategy. It is being in tune—in step—in sync—with the vision. Understanding it on a deep level means that it has taken root in one's being, like the roots of a tree in the earth. Leaders make the vision resonate throughout the room like a concert pianist at Carnegie Hall. The pianist knows he cannot control the effect his music has on the audience. He can only bring all his talent and preparation to the stage. So, it is with the visionary leader. Vision development and realization are largely out of the leader's direct control. Influential visionary leaders empower their team members to bring their whole selves to work daily. Only then can their creativity provide the fuel to move the organization toward its future.

In Zone 9, leaders hold orchestration and empowerment in a healthy tension. This integrates both approaches and accounts for how stakeholders develop visions, realize their potential, and fulfill their collective destiny in real time. I did not use words like "achieve" or "accomplish." Vision development and realization reach deeper than goal achievement. When a vision is realized, its developers experience deep fulfillment. On the individual level, fulfilling one's purpose leads to a greater level of what Abraham Maslow called "self-actualization" than when one achieves a goal. When a group fulfills its purpose, this actualization increases by orders of magnitude. Empowerment is discussed more in depth in Chap. 9.

Personal Challenge: Maintaining Equilibrium

The effective management of Zone 9 sets founders and CEOs head and shoulders above their peers. It is difficult to find all the required skill sets in one person. They have to manage polarities well. It is common for Founder-CEOs to balance people and relationship skills with creative and technical skills and, in turn, with sales, finance, and business skills. Each skill set has corresponding emotional, physical, and intellectual requirements. More established organizations hire executives and start entire teams to complement and supplement the CEO's skillset.

The leader's balancing act includes maintaining healthy tension and equilibrium between leader agency and self-organization (Chap. 2); inside-out, outside-in, top-down, and bottom-up approaches (Chap. 5); focal vision and peripheral vision; and one-to-many, few-to-many, and whole group collaborative approaches.

Application to Twenty-First-Century Organizations

The ability to gain and optimize the velocity of a struggling company is known by many names. The most common is a turnaround. During crises, boards hire CEOs for the express purpose of turning the company around. This mission has a shelf life of a few years. For instance, Jim McNearney's mission to turn around 3M lasted five years. Although successful in completing the mission, McNearney left 3M employees and managers with a by-product. The efficiency-based values of Six Sigma stood in direct opposition to 3M's legacy of spontaneous innovation. 3M's culture eventually released antibodies in response to the Six Sigma values that stifled creativity. The culture deployed antibodies against parts of the Six Sigma methodology that opposed its shared vision and embedded values. Upon taking the reins as chief executive, George Buckley integrated innovation with efficiency without stifling creativity (Chap. 9).

Organizations slow down to radically change direction. When preparing for take-off, even a new business slows down to accommodate the twists and turns of taxiing—or pivoting— toward the runway. The secret is no visionary wants to lose momentum. Such was the case at Blackberry. So, for several years, leaders chose not to focus on the need to change direction as momentum and velocity plummeted. In some ways, the former smartphone pioneer started moving in reverse—losing customers. Blackberry's velocity changed after Apple disrupted the smartphone market. Under John Chen's leadership, Blackberry changed its strategic direction altogether. This was more than a pivot. Blackberry returned to its identity rooted in the original vision for Research in Motion. Blackberry of 2024 is experiencing Vision 3.0.

It is difficult to find the required skillsets for every stage of a company wrapped up in one executive. If it were easy, the tenure of C-Suite executives would be longer. A CEO must manage situations and skillsets that, at best, run counter to each other and, at worst, can be polar opposites. These skills include product development, sales, finance, and technical savvy. Executives who can manage diverging skill sets over a long period set themselves head and shoulders above their peers.

Summary

The Vision360 model places the leader in the center of a process to direct vision development and realization. In contrast to the traditional top-down visionary leadership approach, the Vision360 model is not leader-centric. Therefore, leaders should use their agency to validate emergent visioning and accommodate spontaneous interactions that drive the vision forward. How leaders view and approach decision-making and control determines the company's long-term trajectory.

Omnidirectional leadership of the nine zones requires a leader's A-game. Zooming in and out requires leaders to detect conflict and harmony between varying units of analysis (see Chap. 5 for a discourse on multidirectional leadership). The Vision360 leader balances the system of leadership with their followers' ability to self-organize. As the hub in a network of stakeholder groups, visionary leaders balance their agency with providing space for creative responses and empowerment for decision-making.

Conclusion

In American football, zone defense is designed to protect the quarterback. In visionary leadership, zone defense protects a new vision from being extinguished by the status quo. In Zone 1, the leader ensures the organization can unfreeze immunity to new ideas to experience pivotal moments and paradigm shifts. In Zone 2, leaders detect events that trigger a vision search and select a starting point for sharing the vision. In Zone 3, team members begin experimenting with the initial vision. Testing the vision is a popular starting point for sharing a minimum viable vision. In Zone

4, the vision emerges—or pops up—in the most unexpected places and spontaneous ways. Decoding stakeholder language enables leaders to hear vision emerge from various containers and contexts. In Zone 5, a vision begins to transcend functional and occupational language barriers. Interpersonal and organizational communication is reinfused with new meaning for a new vision. In Zone 6, a vision crystallizes into definite forms using cascades and communication cycles. In Zone 7, the vision drives the organization to undergo metamorphosis to become something different to reach fulfillment. A developmental approach is essential to a successful transformation. In Zone 8, leaders resolve creative tension—the gap between the future vision and current reality—by reconciling where they are, what they have, and where they want to be. In the sweet spot of Zone 9, the leader optimizes velocity by orchestrating vision development and empowering followers to make decisions to push the vision forward. Enduring companies appear to manage the nine zones more effectively. CEOs who manage these zones effectively rise head and shoulders above their peers.

Summary

Vision is iterative, and its development process moves in loops, not straight lines. The Vision360 model implies that leaders and organizations will take multiple loops on the Vision Journey. This principle is foundational to Vision360.

This book proposes that vision is iterative and unfolds within a multi-loop vision journey. Leaders who iterate the organizational vision toward the higher levels of maturity position their followers to see the organization differently, self-organize for maximum agility, and increase the capacity for shared visioning. A few takeaways from this chapter include:

- Vision iteration starts with a good enough vision—Vision 1.0.
- By assembling a "good enough vision," organizations can anticipate and accommodate change over the long term while enabling people to self-organize around the vision.
- Leader agency is critical to vision development and realization.
- The shift from control to empowerment is difficult for entrepreneurs to make.
- In a climate of high trust, leaders will allow their team members to put their initial vision to the test.
- Vision integration is never the goal. A point person should run defense on each of the nine zones to prevent the organization from being blindsided.

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Part II

Increasing Buy-In Through Shared Visioning

When thinking of the word “share,” what images come to mind? A tech-savvy Millennial may immediately think of reading a post on Facebook, LinkedIn, or Instagram and hitting the share button. Maybe companies associated with the sharing economy, like Lyft and Uber, come to mind. Perhaps a spouse thinks of communicating their feelings to their life partner over lunch at their favorite restaurant.

In organizations, sharing vision is a more robust process than hitting the share button. However, leaders often employ methods of telling vision to employees or selling team members on the benefits of adopting a turn-key path to the future. Indeed, time and budgetary constraints lead to a deprioritization of shared visioning methods; however, the critical nature of building a truly shared vision cannot be understated. And such a vision is not cobbled together and wordsmithed beyond recognition in a one-off vision statement session. Collective visioning requires more time and finesse—two elements in short supply within contemporary organizations. By using methods such as whole group processes, leaders increase the likelihood of a vision being accepted by a critical mass of organizational stakeholders. Given the links between shared vision and high performance, it pays to use group discovery practices to build and clarify a collective future.

Divides in the Visionary Leadership Paradigm

The nutshell of traditional vision leadership sounds like this: A leader casts a picture of an ideal future state to inspire others to pursue its realization. Sounds simple, right? Therein lies the problem. When a twentieth century leader casted a vision, they expected followers to take action to pull that preferred future into reality. Such processes are not automatic. Most ideas sound simple in theory. In practice, things are much more complicated. So, it is with the visionary leadership paradigm. First, the theory of traditional visionary leadership is divided from its practice. Second, fault lines exist between the visionary approach and other areas of leadership and organizational theory. Such divides have caused scholars to question the assumptions of traditional visionary leadership and bridge the gaps. The work of Sooksan

Kantabutra and Gayle Avery have contributed to the first divide. The groundbreaking work of organizational behavior expert Jeffery Kohles (later in conjunction with followership experts Michelle Bligh and Melissa Carsten) addresses the second.

Twenty-first-century visionary leadership studies are enlarging the concept of how vision works while drilling down and becoming more granular about the process. For example, Sooksan Kantabutra and Gayle Avery (Kantabutra, 2006, 2008a, b, 2009; Kantabutra & Avery, 2002; Kantabutra & Avery, 2003) have contributed to expanding the paradigm with studies on what they termed "vision-based leadership," which focuses primarily on how vision content affects performance. Kantabutra's research teams have defined and tested factors contributing to developing and fulfilling future vision within small-to-medium enterprises.

The second significant contribution is being made by Kohles and colleagues (Kohles, 2001; Kohles et al., 2012, 2013). In his dissertation, professor Jeff Kohles coined the term "vision integration," subsequently conducting related studies with leadership scholars Michelle Bligh and Melissa Carsten. Borrowing from the work of Rogers' (2003) *Diffusion of Innovations*, the first study examined the feasibility of treating vision as an innovation that an organization can either accept or reject upon any attempts at vision diffusion (Kohles et al., 2013). The second study tested a model of "the leader-follower communication processes involved in linking vision with follower work behaviors and decisions" (Kohles et al., 2012, p. 476). The introductory sections of many vision-related journal articles resemble literature reviews due to the current volume of vision literature. Meta-analyses may begin to emerge within the next decade. The science of visionary leadership is gradually expanding to consider how leadership plays a role in vision development, integration, and realization.

Writing a vision statement is the most famous way visions are formalized. Actions preceding this step are more nebulous. Part II sheds light on this back story. Chapter 4 draws a connection between the vision search and strategic foresight, using the concern for a company's future as a common thread. Chapter 5 explores factors causing a vision to enter the Adoption Pit–a roadblock encountered by every visionary leader on the planet at some point in their careers. This section also discusses an essential activity and critical checkpoint that must precede this stage to escape the Adoption Pit. Rather than devising concrete plans, leaders are encouraged to crystallize their strategy using the vision reflection process. Chapter 6 unpacks vision-related insights into how new ventures emerge, achieve legitimacy, and increase investment readiness. It also discusses the importance of minimizing risk of failure in early-stage companies. Chapter 7 explores the tug of war between vision creation and vision emergence. Special attention is paid to the benefits and value of shared visioning and its iterative nature. Alternative pathways to a "good enough vision" are explored.

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Vision Conception: Detecting the Need for Change

4

It was vision that inspired the invention of the automobile.
It was foresight that anticipated traffic jams, accidents, and pollution.
—Bill Barton, former center head for American Express' Consumer Lending Operations

No one can throw cold water on a fresh vision like a naysayer. Visionaries pursuing moonshot projects can often downplay, overlook, or silence these voices—usually to their detriment. The resistance and dissent offered by skeptics carry valuable information. Realists need a way to anticipate the future, learn from the past, and act in the present.

After presenting the academic version of Vision360 to founders, C-suite executives, and consultants in various industries, I noticed a subconscious narrative that sounds like this: "Vision is too future-focused for me. It's too pie-in-the-sky. I need something right now." This narrative revealed an ever-burning question this chapter's principle is designed to answer: "How do visionaries know their vision is relevant?"

Principle 5
The starting point for a vision search is in an organization's peripheral vision, where the internal organization interfaces with the external environment.

Light Switch Theory and Detecting Weak Signals

Technological advances disrupt industries. Think about the Industrial Revolutions. Over the last 250 years, four Industrial Revolutions have disrupted industries and created entire sectors. Each revolution produced technological changes and resulting economic shifts alongside long-lasting market trends. The Fourth (and current) Industrial Revolution has reshaped industries and economies through the Internet of

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Things, artificial intelligence, and other cutting-edge technological advances. Technology is transforming the way we work, live, and interact. Leaders who detect technological disruption can prepare their organizations to get ahead. However, if a leader cannot see the possibility of disruption, how can the organization recognize the need to pivot or adapt to its surroundings?

Diversity, equity, inclusion, RFID technology, and derivative contracts began as weak signals and ended up impacting society and the economy in unprecedented ways. For example, in 2020, the DEI movement picked up steam and reached a tipping point following the killing of George Floyd and the conviction of Derek Chauvin the following year. The DEI movement resulted in the renaming of famous brands such as Aunt Jemima and the Washington Redskins, in favor of more politically correct alternatives. Groupthink can cause teams to downplay the weak signals sparking such movements, which are outlying indicators of disruption that show up as implausible versions of the future (Radin, n.d.). A leader's ability to sense such activity on the periphery of an organization can determine how they move into and cope with the future. Leaders who are hyper-focused on present tasks concentrate on what is directly ahead at the expense of their peripheral vision, which renders them "vulnerable to rivals who detect and act on ambiguous signals" (Schoemaker et al., 2018, p. 30). The competitors' actions can quickly threaten the organization's market share or existence. Organizations are complex entities navigating even more complex environments. So, the leader can only know some things, not everything. Chapter 1 advises leaders to turn on the light and empower their people to see.

The ability to see is necessary to avoid threats (e.g., predators) lurking in the external environment. Marine biologist Andrew Parker's (2003) light switch theory proposed that developing biological vision advanced three ends: (1) accelerated human evolution, (2) enabled humans to create a model of the world, which in turn, (3) required the development of a bigger brain to understand it (Jaffe, 2016). In other words, the advent of light-triggered organisms to develop visual sight and more complex brains to adapt more quickly to their surroundings. Light switch theory presents valuable business insights involving the use of foresight for adaptation. For example, Google's ability to see around corners fueled its decision to self-disrupt in time to invest in an oncoming wave of tech startups. The pioneer in online searches restructured in a well-timed and vision move to transform its core business into a signature brand under the parent company, Alphabet. Facebook made a similar move in 2019 to strategically reposition the social media platform under the umbrella of Meta Platforms and reposition itself on the frontier of the metaverse. Blockbuster's case also affirms the need for agility inspired by foresight. Online streaming was not perceived as an imminent threat, and the need for digital transformation was downplayed. As open systems, organizations are susceptible to minor and major changes within their surroundings. Unmitigated VUCA conditions can send such a complex system beyond the edge of chaos and into an untimely decline. Seeing the threat is just the beginning. Deciding what to do about it causes leaders and teams to rethink their future.

The Vision Search

In *Onward*, former Starbucks CEO Howard Schultz recounted the lengths it took to get the global brand back on track after a period of aggressive expansion and declining quality. Schultz (2011) noted, “Before we began the tough work of defining Starbucks’ future, we had to spend time just seeing” (p.72). Preparing to challenge the status quo required the leadership team to reawaken their imagination. Through a series of small and large group interventions, organizational transformation consultants from SY Partners taught Starbucks to see the organization through new eyes. Using the world-renowned British band the Beatles as an example, the team of organizational transformation consultants led a cross-section of Starbucks stakeholders to consider what it takes to reinvent an icon. Most importantly, they grounded the tailor-made vision search experience in Starbucks’ unique history, identity, and legacy. In response to a tanking share price and internal woes, they rediscovered their collective identity and embarked on a new strategic direction.

10 Triggers Vision Search

Starbucks’ vision search was not the product of randomness or chance. Like seemingly random events can trigger an ordinary person to fly off the handle, vision triggers can prompt a vision search. O’Connell et al. (2011) sorted ten triggers into three groups: executive influence, life cycle, and organizational change. An executive can prompt a vision search through personal values and extrinsic/divine inspiration. Three phases in a firm’s life cycle can trigger a vision search: (1) founding and early stages, (2) periods of disruptive change such as turnaround when organizations attempt to overcome severe difficulty, crisis, or decline, and (3) periods of purposeful planning. Such periods include the reexamination of organizational factors such as culture and operations. Future planning can also involve a significant redirection or transformation where “vision may be developed with a fairly long time horizon at the highest organizational levels, with more specific goals and shortened time frames articulated at lower levels (Zaccaro & Banks, 2001)” (O’Connell et al., 2011, p. 107).

The five remaining vision triggers are less associated with the life cycle and instead prompted by internal and external changes. O’Brien and Meadows (2003) identified five changes that could drive a vision search within organizations, including (1) change in an organization’s status, including demutualization (i.e., a mutually owned company becoming shareholder-owned) and privatization (e.g., British Airways circa 1987), (2) a change in top management, (3) a change in profitability (e.g., due to hitting a low point in the economic cycle), (4) changing environmental circumstances (e.g., increased competition threatens market share), and (5) the introduction of a formal change program including, but not limited to, downsizing, restructuring, and rebranding) (O’Brien & Meadows, 2003; O’Connell et al., 2011). These factors do not always work in isolation, and convergence between visioning, proposed personal values, and external inspiration can trigger a new vision. O’Connell et al. (2011) suggested, “Visions are often triggered when there is a startup, leadership change, or a perceived need to steer the organization from decline or to raise its performance further" (p.107). Table 4.1 describes and gives examples for each of the ten triggers.

Vision triggers do not often work in isolation, nor does their presence automatically spark change for leaders and teams. When companies and entire industries ignore the triggers, multiple events can converge to produce a crisis—which does not bode well for building a shared vision from the more mature starting points of experimentation, consultation, and co-creation. Warnings come in many shapes and require keen discernment to make sense of. One could also argue that organizations have immediate and underlying triggers. Such was the case with nearly all seven recurring case studies. If leaders choose to engage in the vision conception process fully, vision triggers can contribute to teaching an organization how to see. Suppose the leader is not open to seeing differently. In that case, the organization's Vision Journey will turn into an uphill battle, motivating a board of directors to consider replacing the leadership if the situation fails to turn around. The light switch and vision search cycles never end—they continue on the team and individual levels in the vision integration phase, covered in Part III. Nonetheless, changes and conditions prompting vision searches provide stakeholders with opportunities to view the organization differently.

Leaders Elicit Foresight

A tendency among visionary leaders is to treat future vision as a directive. In futures studies, vision is one future among many (see Fig. 4.1). Alternative futures do exist. Just because vision is called the preferred future does not guarantee its realization. A leader's job is to elicit the foresight that already exists within the organization (Kohles et al., 2013). Foresight exists, not in the focal vision but in the blurry or peripheral vision. On the periphery, vision is blurry, signals are ambiguous, and hindsight is 20/20. An organization must consistently calibrate collective alignment with the preferred future to avoid entering a collision course with a less desirable possible or plausible future.

Case Study: General Motors and Ford Rethink the Status Quo

Henry Ford, the founder of Ford Motors, once declared, "Any customer can have a car painted any color that he wants so long as it's black" (Ford, n.d.). In the early days of automobiles, a car could be assembled within a few hours. Unfortunately, the drying times for paint and varnish spanned more than a week (Schrage, 2016). Ford used black paint because it dried the fastest. In an unlikely turn of events, Ford's competitor, General Motors (GM), solved the paint problem. Charles Kettering, an eccentric businessman, serial inventor, and head of research at General Motors, held the key to GM's ability to innovate.

In 1919, a group of engineers informed Kettering they could shave 6 days off the 37 days it took to paint a car. He responded with his ideal drying time, saying, "An

Table 4.1 10 Vision search triggers

Name	Description	Application/Indicators	Examples
Executives' values	A leader projects their core values onto the organization and challenges the status quo	An entrepreneur ventures out to do business differently from a previous employer A board of directors replaces a founder/ existing CEO with a professional CEO	Jim McNearney (3M) Elon Musk (Tesla) J.P. Morgan (Banking industry)
Divine inspiration	Supernatural encounters and spiritual values commonly trigger visionary experiences	Pivotal moments like epiphanies, "aha" moments, and moments of truth prompt openness to a better future	Dr. Martin Luther King, Jr. Dolly Parton Habakkuk (ancient prophet)
Founding and early stages	Early-stage companies begin by testing an initial vision (usually the founders') to discover a shared vision	Startup and corporate ventures build a minimum viable product (MVP) to test the founder's initial vision and achieve product-market fit	3M (1902–1914) OpenAI
Disruptive, discontinuous, or transformational change	Periods of disruption, discontinuous, or transformational change prompt a vision search for mature organizations	Turnarounds sparked by crisis, severe difficulty, or decline, or reinvention sparked by the threat of these fates	Blackberry Netflix
Purposeful future planning	Engage the strategic foresight process to anticipate and shape the future	The desired outcome is to improve performance or steer away from decline	Starbucks (circa 2006) Toyota
Change in organizational status	A mutually owned company becomes shareholder-owned; a publicly traded company becomes private; or status is gained or lost	Demutualization, privatization, change in status, certification, or accreditation	British Airways Dell Burger King
Change in top management	Changes in executive leadership trigger a vision search	CEO replacement changes in C-Suite Founders' Syndrome	John Chen (Blackberry) David Risher (Lyft) George Buckley (3M) J. Drew Sheard (COGIC)

(continued)

Table 4.1 (continued)

Name	Description	Application/Indicators	Examples
Change in profitability	A low point in the economic cycle (e.g., recession, depression) affects market dynamics and profitability	Recessions and depressions combine with other triggers, causing market share, revenues, and share prices to fall	Alcoa (pre-restructuring) Rivian
Changes in the external environment	Shifts in the business environment, including market conditions, technology, and commodity prices	Factors like customer preferences, increased competition, and technological shifts threaten market share	Blockbuster Nokia Toys-R-Us
Planned internal change initiatives/ programs	The introduction of a formal change initiative sparks a vision search	Reexamining culture, operations, or strategic focus prompts a change management or organization development initiative	Netflix Southwest Airlines

Sources: O'Brien and Meadows (2003) and O'Connell et al. (2011)

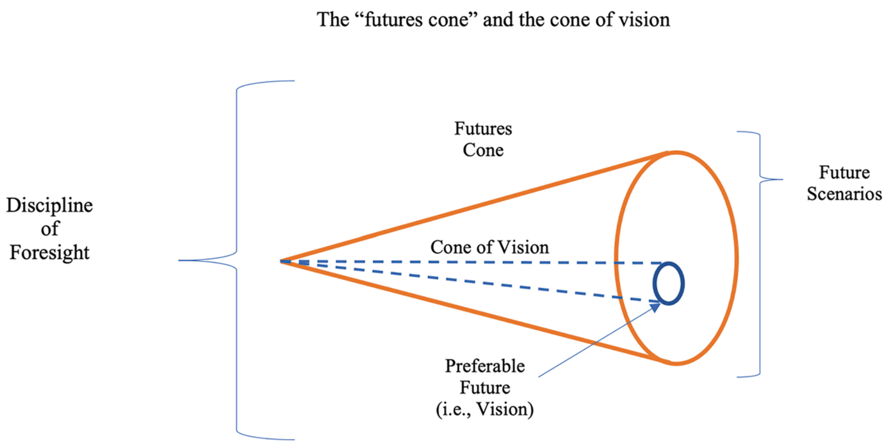

Fig. 4.1 Contextualizing vision within futures studies. (Source: Adapted from Hancock and Bezold (1994) and Hines and Bishop (2015))

hour would be more like it" (Useem, 1997). The gap between Kettering's vision for various car colors and the realities of paint-drying times compelled him to develop a proprietary form of quick-drying paint. GM's engineering team was skeptical and considered Kettering's one-hour paint-drying mission pie-in-the-sky. Determined to prove his point, Kettering invited a skeptical colleague to lunch. When the two men finished eating, they headed to the GM parking lot. To the surprise of Kettering's colleague, his car had been repainted a different color and even had time to dry during the lunch meeting (Useem).

In 1923, General Motors began painting cars in different colors. By 1935, GM's engineering team had reduced drying times to 5 minutes and eliminated the production bottlenecks exacerbated by the glacial pace of drying paint (Useem, 1997). GM solved the problem Ford brushed. Kettering's ability to envision future solutions combined with a penchant for experimentation pulled GM (and Ford) into the future of the automotive industry (Stoddard, 2011).

An organization's status quo, or "the way we do things around here," is an operating system of survival. It is tested and tried by a group's ability to adapt to the external environment while coordinating internally to remain on the leading edge. Leaders turn the status quo over to the company culture with specific instructions to "guard this with your life." The status quo is more than an organization's secret sauce—it's the secret to survival. There comes a time when marketplace events call the status quo into question. The following section proposes how this process begins under the radar and builds to become a force to be reckoned with.

Vision Accretion

Not every ambiguous signal becomes a megatrend. Industries and the organizations that inhabit them put weak signals through a litmus test. One such test is that of accretion. Accretion processes in the natural sciences include "the growth of biological issues and crystals, the build-up of volcanic and sedimentary rocks, the formation of planets" (Sozio & Yavari, 2019, p. 1813). The nebular hypothesis was introduced by Immanuel Kant in 1755 and given scientific expression by French mathematician Pierre-Simon de Laplace in 1796 (Lagasse & Columbia University, 2018; "Nebular hypothesis," 2006). This theory proposed:

> The solar system is formed from a great rotating cloud or nebula of material (gas and dust) collapsing under its own gravitational attraction. An interaction of forces caused the cloud to form a rotating flattened disk called the solar nebula. To conserve angular momentum, the disk rotated more rapidly as the contraction progressed….rings of material became detached from the spinning disk when the velocity at its edge exceeded a critical value, and…the material in these rings later coalesced to form the planets. The central product of the contraction is the Sun, while the planetary satellites may have formed from further rings shed by the condensing planets ("Nebular hypothesis," 2006)

Technical objections related to conflicts with observations of angular momentum notwithstanding, the nebular hypothesis and resulting planetary accretion scenario inspired a recent theory in the business world.

The accretion theory of ideation (Sosa, 2019) draws upon principles of astrophysics to rethink idea formation, using the metaphor between accretion theory and design ideation as a model for growth. The concept of "ideation physics" is of particular interest as it helps "to structure ideation along a time dimension…from ideas produced in a few seconds…to several minutes…multiple hours…days or weeks…and months" (Sosa, pp. 11–12). An organizational vision is not always created in a single sitting and captured in a formal statement. Vision is often conceived using the process of accretion to assemble the clues gained using foresight, insight, and hindsight. Accretion is the process individual vision, hair-brained ideas, and raw data go through to become something greater to an organization.

Types of Thinking

Learning to see is only the beginning of vision conception. Seeing, thinking, and doing must work hand-in-hand. Oster (2011) proposed that "one must *see* differently to *think* differently to *do* differently" (p.189). How a person acts and behaves directly reflects how they think and what they have learned. A person's thinking is linked to how they see and perceive reality. Their thoughts shape both their reality and their future. Thinking is a prerequisite for taking action, and various types of thinking exist within organizations (Table 4.2).

The VUCA environment has forced leaders to reevaluate twentieth-century leadership and management practices. Management expert Gareth Morgan advises leaders to rethink popular management principles such as efficiency thinking by considering the associated strengths and limitations. For example, Morgan's (2006) brain metaphor implies "strong central leadership and control…setting clear goals and objectives…the role of hierarchy… the concept of organizational design [and]…trying to develop and impose systems from the top down" (p. 113). (Morgan) proposed:

> Leadership needs to be diffused rather than centralized; even though goals, objectives, and targets may be helpful managerial tools, they must be used in a way that avoids the pathologies of single-loop learning; goal seeking must be accompanied by an awareness of the 'limits' needed to avoid noxious outcomes; and hierarchy, design, and strategic development must be approached and understood as self-organizing, emergent phenomena. (p. 113)

The brain metaphor inspires leaders to reevaluate organizational structure to see it differently and adopt a different perspective.

Managers should learn to detect paradoxes because the brain is paradoxical and inspires the occasional contradictory management principle (Morgan, 2006). For instance, conflict and threats associated with moving toward emergent patterns include the struggle between learning and self-organization on the one hand and

Table 4.2 Types of thinking

Efficiency thinking	Design thinking
Verbal thinking	Visual thinking
Creative thinking	Innovative thinking
Strategic thinking	Rethinking
Convergent thinking	Divergent thinking
Reflective thinking	Collaborative/collective thinking
Systems thinking	Causal-loop thinking
Linear thinking	Lateral thinking

power, control, and hierarchy on the other. This section will highlight two paradigms: efficiency thinking and visual thinking.

Efficiency thinking Efficiency thinking represents the status quo of many twentieth-century organizations. This type of thinking is rooted in scientific management theory with goals to increase predictability, optimize performance, and shift power toward the top of a system (Berkun, 2010). Consequently, efficiency goals establish paths of least resistance within organizations. On the macro level, capitalism contains paths of least resistance that lead to efficiency and competition and motivate companies and managers "to control costs by keeping wages as low as possible and replacing people with machines or replacing full-time workers with part-time workers" (Johnson, 2008, p. 163). Managers implement reward systems to prevent team members from deviating from established norms. These norms become institutionalized within the culture, constantly reinforced by rewards and punishments. When disruption rears its ugly head, and leaders introduce a new vision, they discover that "old habits die hard" is much more than a cliché.

Visual thinking Organizations learn how to see using imagery and visual thinking, or visualization. Liedtka and Ogilvie (2011) described visualization as "the transformation of information into images that you see, either literally with your eyes or figuratively with your mind's eye" (p.49). Visual thinking techniques help innovators to process ideas in an action-oriented way. Project teams use rapid prototyping to think through product design and represent intangible items like organizational processes, experiences, and solutions (Brown, 2009; Kohles, 2001; Schrage, 2016). Sketching and drawing are two other popular and inexpensive visual thinking methods.

With the advent of digital media, generation loss is less prominent than in previous years. Generation loss occurs within analog recordings and signifies "a progressive loss of quality that occurs every time a tape, film, or vinyl disc is copied" ("Generation loss," 2016). When it comes to vision conception, visualization minimizes generation loss, which is important for two reasons. First, visioning and dreaming happen non-verbally (Oster, 2011) and must be translated into words. Second, leadership teams tend to translate a vision into strategy quickly (Olson & Eoyang, 2001). As a result, these shared images of the future are susceptible to suffer generation loss. Generation loss in vision conception renders a diluted or distorted image of the future. Such a picture is difficult for team members to buy into. Visionary leaders use imagery to help folks imagine themselves as part of a better future.

Pattern recognition and other perception-based exercises are additional ways to think visually. For example, the "Brutethink" technique (Michalko, 2006) enhances strategic foresight capabilities by helping stakeholders identify external trends and patterns and appropriate insights within the organization. Its value became apparent after using Brutethink in a strategic thinking session for a government contracting consultant. Such exercises help teams to see similarities between unrelated objects and carry these insights into a business context. Futurists use horizon scanning to gather new ideas, trends, and practices that signal early signs of change on the long-term horizon (Gordon, 2009). Thinking precedes learning and rethinking leads to different lessons. Using creative-thinking techniques can change how internal stakeholders view the organization. When organizations think differently, they are on the road to seeing differently.

The Benefits of Seeing Collectively

Visionary leadership has become a go-to approach for leaders when thinking about the future. When people want to rethink the future, visioning is usually top-of-mind. This preference is often subconscious. Yet, vision is just one way to think about the future. Many times, foresight would be a more productive alternative. There are many other methods.

During vision conception, executives invite feedback from various sources, which, among many other outcomes, helps the organization surface tacit assumptions and eliminate blind spots. Inviting the participation of stakeholders who can see within or beyond organizational boundaries increases the chances that a shared visioning session will succeed. Only some of these individuals will be internal stakeholders, but when placed in a room together, they offer more collective insights than they could alone. Managers and team members offer keen perspectives on operational and tactical levels, at the very least. Customers provide information about their preferences and other market-related insights. Consultants, coaches, and other external stakeholders offer an outside perspective on various topics related to the business' identity, strategy, culture, and operations. Organizational members and stakeholders begin to see together when they engage in dialogue. Only then can a truly shared vision be conceived.

Rewinding

Creating a truly shared vision requires organizations to start earlier in the vision development process. Ideally, that starting point is during the conception phase. Earlier in this chapter, we established that the effectiveness of an organizational vision may be partially related to the nature of triggers that spurred the creation of a vision (O'Connell et al., 2011). If a founder engages in a lone visionary experience, followers will discover the triggers through speculation and the grapevine. Moreover, the visionary will likely resort to basic ways of telling and selling as starting points for shared visioning. Even a mandated vision contains assumptions worth questioning—not in a disrespectful way that would jeopardize one's career future, but in a way that uncovers the thinking behind a leader's decision to head in a new direction. After all, a dictated vision reflects the leader's assumptions, values, and experiences. Unpacking the underlying assumptions of a mandated vision will unlock insights and interests that can move and motivate stakeholders to take action.

Many companies' assumptions about the future are no longer working, and an entrepreneur's Vision Journey usually begins with a paradigm shift followed by the search for a new future. Leaders and followers search for new mental models concerning the future—new models based on what Drucker (1994) called the theory of the business. This preferred future state may be related to the present condition or take the organization in an entirely new direction.

Consider a solopreneur who desperately wants more freedom and decides to start a business. They want to own their job and do work they love while enjoying all the flexibility their schedule will allow. There is nothing inherently wrong with this path. Four in five businesses are non-employers, which means they function similarly (US Small Business Administration, 2018). This approach loses its magic when an entrepreneur starts a business and grows to have one or two, then ten or twenty, and finally, a couple hundred employees. If a twenty-person company still runs like a one-person operation, as the founder started it, the organization risks outgrowing its initial vision.

Or the founder had a mission-driven company. In that case, the employees know who they are as a collective unit and are confident about whom they are serving and the benefit to those customers. The problem is that they need more inspiration to come to work every day or are looking for more of a challenge out of their jobs. Maybe they want to create something—together. At this point, the mission is not enough. Both examples show that embarking on a solo vision journey differs significantly from engaging the visioning process as a group.

Group Process: A Container for Vision Emergence

Generating a critical mass of buy-in and consensus around a new direction is a game-changer, a difference-maker. The need for buy-in starts the moment the vision search begins. If a leader waits until the adoption phase, it is too late. When gaining acceptance for the vision, leaders navigate the journey with an eye toward the future. It is critical to build momentum for adoption during the conception stage.

Vision emergence departs from the notion of sponsoring a one-time experience to create a vision statement. (Chapters 3 and 7 cover this topic in depth). In organizations and other complex systems, vision breaks forth in spontaneous interactions, unplanned experiences, and energizing exchanges between organizational actors. These encounters occur within the external and internal realities that organizational members discuss. The desire for a better future drives these encounters—a future they prefer to create and not just tolerate. Their vision search is in full swing whether they know it or not.

Rarely, if ever, do board members, CEOs, and their executive colleagues sit around a boardroom table together and decide to change the organization without regard to the organization's position in or degree of alignment within its external environment.
Reading that environment accurately and reacting accordingly is indispensable.
—W. Warner Burke

The "containers" or contexts through which vision emerges are critical for grounding vision in current realities. Regardless of its content or attributes, a vision should be grounded in two types of realities to avoid employees dismissing it as "pie in the sky." First, vision should be grounded in the realities of the external environment and strategic landscape. Second, a vision should be grounded in the realities of the internal organization. (See Chap. 6 for a list of containers for vision emergence.)

Leaders can clarify and build commitment to a big idea by determining how it fits its external and internal environment (Olson & Eoyang, 2001). Adopting such an approach ensures that vision is connected to current realities. The starting point for a vision search rests within an organization's peripheral vision, where the internal organization interfaces with the external environment. Vision conception happens on the fringes of an organization—on the edge of chaos. Factors in the organization's external environment make the need for change imminent.

Counternarrative: An Externally Imposed Vision

Chapter 5 talks about the effects of a vision imposed by the founder. In terms of the starting points, this vision is shared by telling. In another scenario, the external environment imposes a vision on the organization. More specifically, innovations in the business landscape lead to market changes, and that need for change applies pressure on organizational leaders. In the case of a time crunch or crisis, leaders can respond in several ways. They can accept the vision and demand internal change, find a middle-of-the-road solution, or completely ignore the pressure from the outside world. However, they risk passive-aggressive resistance if the general body does not grasp the urgency or agree with the methods.

If organizational leaders decide to adopt a change vision without considering the organization's specific situation—its culture, identity, and status quo—the organization will treat that untested and unshared vision as an antigen or external threat. As a result, it will (1) deploy *negative* antibodies to destroy it and (2) surround the status quo, culture, and current vision with *positive* antibodies to make it immune to what it perceives as external threats. Note: Negative and positive antibodies are considered in relation to the old and new vision. Negative antibodies are unleashed on a new vision leaders want to impose on the organization. In this case, positive antibodies are unleashed to surround and protect an old vision, culture, and status quo—even though it may be doomed if the organization does not change. The culture seeks to preserve its status quo and the defensive values and routines associated with it. Following a conversation with foresight expert Lance Wilkins, I began to view Blackberry's case through the lens of an externally imposed vision.

Immunity describes the desired response to an external threat from an antigen. Autoimmunity describes the undesired reaction of the human body to an internal threat. In both cases, antibodies are deployed. In the case of autoimmunity, the body must be taught to avoid fighting itself. It must be retrained. In cases of immune and autoimmune responses, learning must occur. The body has to appraise the antigen correctly and decide how to respond.

Antibody: Absence of Convergent Thinking at Education Company

In 2019, I facilitated a workshop for an education company. To give some context, the team of nineteen comprised five top managers who were Gen Xers and early Millennials. The other fourteen team members were late Millennials and Gen Z employees. For many of the Gen Z, this was their first job. Halfway through the whole group session, top managers and team members discovered a gap in the thinking process. The top managers began idea generation by inviting team members to share their thoughts, feedback, and ideas during brainstorming sessions. Such sessions would go on for weeks at a time to gather information. Team members became confused when managers moved from divergent thinking to convergent thinking. The problem came because they didn't get any notice from managers that this was about to happen. It was like flipping an hourglass once the sand had reached the bottom. The absence of convergent thinking gave the perception of a controlling management culture—not to mention giving the team whiplash. Turning the tide between divergent and convergent thinking is an art and a science.

Those familiar with search sessions know that brainstorming doesn't happen for its own sake. As organizations grow and get a handle on demands from the external environment and internal environment, leaders tend to centralize decision-making unless a conscious choice is made to preserve decentralized decision-making practices. Therefore, the final destination for any information obtained is to make decision-making possible. New team members don't always know this. They loved giving their feedback at the invitation of their leaders and needed help switching between divergent and convergent thinking. From their point of view, the decision-making process started too hastily. Leaders had involved them in the information gathering and analysis processes but failed to involve them in decision-making. Anecdotally, Millennial team members expressed frustration with the lack of transition between divergent thinking and top-down decision-making, citing what would equate to be an absence of convergent thinking.

Strategic Leadership and Foresight

In the last 30 years, the concepts of visioning and seeing have expanded because organizations need to become more competitive within increasingly turbulent environments. Early detection of potential threats increases an organization's chance of survival. If an organization can learn to see, it avoids dangers lurking in the external environment. Or one could reverse engineer to propose, "What activities do organizations practice that result in the avoidance of threats and other outcomes of individual and collective sight?" This question leads to an examination of the strategic foresight discipline and associated activities such as horizon scanning and scenario planning. Strategic leadership competencies and the Foresight Maturity Model (Hines & Bishop, 2015) provide helpful frameworks for placing vision conception within the more extensive direction-setting process.

Strategic Leadership

Theoretical and conceptual frameworks provide mental models for organizational phenomena. One such model—strategic leadership—is defined as a person's ability to demonstrate six capabilities: anticipating the future (foresight), envisioning the future (vision creation), maintaining flexibility (agility), thinking strategically, collaborating with other stakeholders to initiate changes, which creates a competitive advantage for the organization in the future (Daft, 2011; Ireland & Hitt, 2005). In linking the external and internal business contexts, strategic leadership is "responsible for the relationship of the external environment to choices about vision, mission, strategy, and their execution" (Daft, 2011, p. 396). In essence, strategic leadership capabilities operate at the intersection of vision conception and foresight.

Strategic Foresight and Alternative Futures

Foresight is one way decision-makers can *rewind* to earlier stages of development to examine individual and collective assumptions and increase willful participation. Also known as futuring or futures studies, strategic foresight is "an organizational, social, and personal practice that allows us to create functional and operational views of alternative futures and possibilities" (Futures School, 2015). Rice (2008) further explained:

> Strategic foresight encompasses a set of methods, processes, actors, and organizational forms that enable organizations to identify, assess, and act upon opportunities and threats, that have been identified in the periphery....a matter of envisioning what customers will want and need in the future, and what will be required for delivery....the ability to imagine not only the kind of change that is continuous with the present, but also radical, discontinuous change. (p.58–59)

Foresight helps organizations "to gather and process information about [their] future operating environment" (Jacobsen & Hirvensalo, 2018). Rice (2008) added, "In its most visionary form, strategic foresight can mean foreseeing dramatic changes in the entire industry in which the organization competes, or even the creation of a whole new industry" (p.59). Foresight enables teams to anticipate, frame, and shape the future of their organizations (Richardson, 2020), with a primary goal "to make better, more informed decisions in the present" (Hines, 2006, p. 21). Sanders (1998) contrasted foresight with forecasting, noting that foresight is "the ability to see what is emerging—to understand the dynamics of the larger context and to recognize new initial conditions as they are forming" (p.110).

Foresight considers alternative futures unfolding on the strategic landscape of the marketplace over time (Tibbs, 2000). A futures cone depicts types of futures and time horizons (see Fig. 4.1). Voros (2003) delineated five classes of alternative futures, beginning with *potential futures,* which encompass all types of futures that follow. *Possible futures* include those that may happen, regardless of how far-flung or unlikely; *plausible futures* include futures that could occur given existing knowledge of current conditions; *probable futures* are likely to happen based on the continuation of existing trends; and *preferable futures* concern futures that one desires to happen (Hancock & Bezold, 1994; Voros, 2003). These alternative futures interact with organizations on a strategic landscape with a celestial star representing organizational purpose, a mountain as the strategic objective, the chessboard as the strategic environment, and the self as the strategic identity (Tibbs). This process begins with one's agency as "the self journeys across the chessboard to the mountain, which lies in the medium-term future" Traditional planning horizons look forward from 6 months to 3 years. Foresight looks ahead to ten or more years to consider a firm's espoused goals, identity, future partnerships, collective values, and organizational identity. Time factors are considered in the context of its strategic environment and future trends to shape the organization's future. In group foresight sessions, leaders may find that internal stakeholders do not share their vision. Instead, they view the leader's big idea as an alternative future instead of the preferred future.

Practicing Foresight

Uncertainty about an unknown future is a root cause of anxiety. Uncertainty is all around and will only increase. More variables will be added to daily life, translating to more risk exposure. The truth is that anxiety is a choice. Leaders and managers can choose to respond to uncertainty with anxiety—or with creativity. Strategic foresight is one of the most creative ways to respond to uncertainty and keep anxiety at bay. Many people mistake forecasting for foresight, but forecasting is just one future-thinking strategy. Countless others exist.

Leaders and individual contributors can use foresight as an emotional intelligence tool to minimize anxiety and lean into uncertainty. Chances are you already practice foresight in your daily life. Have you ever done any of the following?

- Planned for worst- and best-case scenarios
- Scanned the news for changes in regulations that would impact your business and personal finances
- Detected market trends earlier than your competitors
- Conducted a PESTLE analysis on your business environment

If so, you have experience using at least one foresight method. Remember that the next time uncertainty tries to manifest as anxiety, you are well-equipped to defeat it.

Six Stages of the Framework Foresight Model

Individual people practice foresight every day. Leaders must draw out the foresight by matching their team's situation with the best-fit foresight tools and methods. Futurists Andy Hines and Peter Bishop provided a context and framework for the strategic foresight process, focusing on the most critical elements of organizational success in futuring (Hines, 2006; Hines & Bishop, 2015). This model places commonly used skills and interventions within a system composed of framing, scanning, forecasting, visioning, planning, and acting.[1] Although many organizations entertain the process in the listed order, other cases deviate. Hines and Bishop (2015) applied numerous foresight methods and associated tools to formulate best practices for each of the six stages of their Framework Foresight Model. Each foresight phase, method, and intervention provides an opportunity, backdrop, or container for vision emergence and iteration.

Framing As a popular first step, *framing* enables leaders to define the scope of work and related objectives, prevent misunderstandings, and avoid working on the wrong problems. Six best practices guide this stage, including adjusting attitudes, knowing the audience, understanding rationale and purpose, setting objectives, selecting the team, and creating a strategic work environment. For example, in the pre-launch phase of organizational change, leaders can frame the problem using stakeholder analysis. Framing activities help to effectively direct energies to the right issues, building momentum for later stages such as visioning. See Chap. 1, Step 3 for a full description of framing the future.

Scanning *Scanning* involves searching the internal environment for organizational experience with the issue and perusing the external context for related trends (Hines & Bishop, 2015). Author Susan Scott (2009) calls this skill having what native Hawaiians call "squid eye"—the ability to know where to look to find information hiding in plain sight. Scott explained, "Seeing squid means you see many things that others cannot and do not see. It means having sight in the presence of the blind. It means that you are a selective and efficient information gatherer" (Scott, 2009, p. 3). Those who identify locations for the necessary information can identify macro trends and weak signals to decipher drivers of change cascading from the environment to the workplace. Four sets of guidelines for scanning include mapping the system under consideration, studying the history to avoid reinventing the wheel, scanning the environment, and involving colleagues and outsiders (Hines & Bishop). Foresight teams use horizon scanning to detect new trends and other information signaling early indicators of change (Gordon, 2009). The ultimate challenge is understanding this information and taking action more quickly and creatively than competitors (Hines & Bishop). This notion links foresight with the sixth component of strategic leadership.

Forecasting Organizations create alternative futures in the *forecasting* phase. This phase departs from conventional wisdom to accept realities about the future, such as (1) the future may not be much like the past, (2) predicting the "correct" future is

[1] The seven phases of the peripheral vision framework (Day & Schoemaker, 2006) loosely coincide with the six stages of strategic foresight proposed by Hines and Bishop (2015).

futile due to uncertainty, and (3) future realities may not match the organization's assumptions (Hines & Bishop, 2015). Therefore, forecasting involves "generating the widest range of creative possibilities, then consolidating and prioritizing the most useful for the organization to actively consider or prepare for as it moves forward" (Hines & Bishop, p. 127). As containers for vision emergence, each phase of strategic foresight provides a lens to shape perspectives on the future. Five guidelines include identifying drivers and uncertainties, choosing forecasting tools, generating ideas through divergent thinking, prioritizing ideas through convergent thinking, and formulating alternatives to mitigate surprises (Hines & Bishop). Scenarios are a popular forecasting tool (Hines, 2006), and data analytics can help organizations capture foresight.

Visioning Anticipating the future serves as common ground for both visioning and strategic foresight. This commonality leads to the fourth foresight component and topic of this book, *visioning*. Whereas forecasting identifies a range of potential futures, visioning operates at the convergence of present and future, helping an organization consider what it wants to do about the future right now. Discovery drives the first three phases, but visioning is the gateway to action. The best practices associated with this stage are identifying implications of alternative futures, clarifying and challenging assumptions, and thinking visionary (Hines & Bishop, 2015). Blackberry's story teaches the urgency of challenging tacit assumptions.

By the time Apple released its first iPhone, Blackberry (then known as Research in Motion) had developed *a blind spot*. Scotoma— a blind spot in an organism's field of vision—assumes multiple forms and is caused by various factors (Sprabary, 2021). Organizations suffer from such blind spots, which may affect how accurately they pick up on weak signals and how completely they identify assumptions. When depending solely on the chief executive or a small cadre of top leaders to scan the environment, organizations increase their chances of adopting faulty assumptions they carry into a collective visioning process. Faulty assumptions cause blind spots to develop. Individual leaders can also experience scotoma when making critical decisions without receiving uncensored feedback from relevant stakeholders. Such actions can reflect scotoma within a company's cone of vision. Moreover, refusing to consider the consequences of past decisions objectively can impact how an organization perceives its path forward.

A small blind spot can have far-reaching effects. One root cause of crises leaders face involving "what" their businesses should do tracks back to misalignment between current realities and the organization's foundational assumptions (Drucker, 1994). In this case, an organization's tacit operating beliefs regarding markets, customers, competitors, technology, values, behavior, revenue generation, and internal strengths and weaknesses no longer fit its reality (Drucker).

Ideally, the previous three foresight stages will have produced a consensus about the future within the organization, which is favorable to generating buy-in for a collective vision. Visioning is a stage in the strategic foresight model that supports the need to start the whole group process earlier than traditional visionary leadership allows.

Planning The *planning* phase involves developing the strategy and options to transform and translate the vision into action. In continuing to reel in the future, the planning phase consists of thinking strategically to develop viable options (Hines & Bishop, 2015). The future is unknowable, and the company that acts quickly with the best-understood information can easily outpace the competition. Therefore, the model positions planning as a bridge between the unknowable futures subsequently mitigated by a long-term vision and daily actions for its realization. Planning charts the path to an organization's preferred future.

Acting The sixth phase, *acting*, walks out the ultimate purpose of strategic foresight: "to make better, more informed decisions in the present" (Hines & Bishop, p. 297). Best practices include communicating results, creating an action agenda, establishing an intelligence system, and institutionalizing strategic thinking (Hines & Bishop). By considering this model before venture development, founders can assist their teams in engaging phases of this process that coincide with specific activities of entrepreneurial companies.

Scanning Megatrends and Disruptors to Detect the Future

Self-driving cars operate using artificial intelligence and deep learning, which "trains the vehicle to drive by feeding it huge amounts of visual data gathered by camera[s] during trips" (Jaffe, 2016, p. 40). This data provides the car with artificial perception gained through teaching the vehicle how to see. This ability is akin to the 15-year-old high school student with a learner's permit, who is learning how to drive and scan the highways for potential obstacles and threats to their safety. Tesla has taught its vehicles how to transform inputs from camera vision into computer vision using advanced vision processing tools (Tesla, n.d.). In a quest to make products simple and return to "first principles," Elon Musk departed from the sensor-based self-driving approach used by most of the industry and instituted camera vision based on the principles of human eyesight (Tara, 2023). This Tesla Vision departs from the industry standard.

Autonomous vehicles and their integrated use of camera and computer vision hold insights for teaching organizations to see using principles of human eyesight. Chapter 1 discussed light switch theory and the importance of an organism's eyesight in avoiding existential threats lurking in its environment. In a simplified explanation of Tesla Vision's approach, multiple cameras detect and identify objects from varying distances. The data collected by camera vision is interpreted using computer vision.

Insights from computer vision relate to organizations in two ways. First, multiple sources of the same type collect data inputs. In a Tesla, cameras source the images and data. Each has a different positioning, distance, and cones of vision ranging from 90° to 120° to optimize and produce a 360° cone of vision. In an organization, employees, managers, partners, suppliers, and customers act as raw data sources. Each stakeholder views the vision from a unique location, which adds a unique perspective to the big picture. They also have different roles, scope of vision, and lines of sight. They represent the groups they are a part of, and their points of view add granularity to the picture of the future. Second, the data is analyzed, interpreted, and used for decision-making. Computer and machine vision work together to minimize the risk of system failure.

Emergent approaches succeed when leaders shape and create the future "by constantly scanning the environment and analyzing their own responses to it" (Davies & Davies, 2010, p. 9). The horizon scanning method reveals trends that provide containers for vision to break forth. In studying high-performance organizations (HPOs), Linthorst and De Waal (2020) identified thirteen megatrends, which are "socio-economic or structural processes that are slowly forming, but once they occur, influence all areas of life for some time" and "larger in magnitude, longer in duration, and deeper in their effects than normal trends, fads, or fashions" (p.4).

Megatrends along with their relative weight included: speed of technological advancement (69%), flexible employment (36%), changing workforce composition (35%), sustainable employment (34%), environmental issues (33%), continued globalization (31%), skills mismatch (24%), increasing inequality (16%), individualism (13%), urbanization (11%), cross-border migration (11%), economic power shifts (9%), and resource scarcity (9%). Disruptors, also known as "black swans" and "game-changers," prevent the usual continuation of systems, processes, or events as their transformational yet unpredictable nature renders them difficult to plan for (Linthorst & De Waal, 2020; National Intelligence Council, 2012). The COVID-19 pandemic and lockdowns are the most recent examples of a global-scale disruptor. Occurrences of pandemic disease represent the lone disruptor identified in this review; however, war, regional conflicts with global consequences, infrastructural disasters, the collapse of economic power blocks, and natural phenomena (i.e., acts of God) could also impact the future of work (Linthorst & De Waal). Each megatrend provides a container for vision emergence. Discussing trends in a group setting and as they relate to each other creates a hotbed for creative responses (Table 4.3).

Tracking and Analyzing Trends: Remote Work and Workplace Disengagement

Strategic foresight begins by examining trends and then bridges into the internal environment. A system can be drawn under the influence of competing contexts, and "the detailed behavior of the system depends on which context dominates" to the point that "seemingly insignificant changes can unfold to create large effects" (Morgan, 2006, p. 254). Thus, an organization's ability to detect trends early provides a competitive advantage that must be sustained to optimize performance (Canton, 2015). It helps to consider two examples in the twenty-first-century organization: remote work and workplace disengagement.

Table 4.3 13 Megatrends

Megatrend	Relative weight (%)
Speed of technological advancement	69
Flexible employment	36
Changing workforce composition	35
Sustainable employment	34
Environmental issues	33
Continued globalization	31
Skills mismatch	24
Increasing inequality	16
Individualism	13
Urbanization	11
Cross-border migration	11
Economic power shifts	9
Resource scarcity	9

Source: Linthorst and De Waal (2020)

Remote work, a trend amplified by the COVID-19 global pandemic, forced organizations to assemble remote work policies quickly in response to lockdowns. Once workplaces opened back up, leaders found themselves negotiating individual needs and organizational goals to find a happy medium between remote and in-person work. Remote work was fueled and enabled by the megatrend of continued globalization.

Workplace disengagement also is trending, especially among younger workers. Gallup's studies have shown that Millennials are less engaged than older generations (Rigoni & Nelson, 2016). Numerous factors could contribute to their disengagement, including workplace stress and high levels of work-life conflict. These factors lead to employee burnout, higher absenteeism and turnover intention, adverse psychological, physical, and emotional well-being effects, decreased job satisfaction, organizational commitment, career satisfaction, and overall success (Bell et al., 2012). Such trends are not arbitrary, nor are their related effects. Due to challenges associated with life stages, Millennials were least likely to have adequate resources required to cope with and counteract personal and work-related stress (Bell et al.). Remote work and the global pandemic have increased levels of workplace stress, which can impact Millennials' job focus and well-being. Surveying the collective organizational experience with such external drivers of change provides leaders with tangible realities, or containers, for vision emergence.

When a startup enters a vision search, founders may or may not have engaged in the foresight process collectively. Often, there is no collective to engage in the process. As the startup matures, phases of foresight will inevitably be undertaken, but most likely, they will not be in this sequence. Employing foresight methods may have a rewinding effect for leaders who have already undergone the process, though they may discover new insights. But remember, the organization must move as a unit to be effective. So, employing foresight allows for vision iteration and will enable decision-makers to periodically return to the vision conception phase to calibrate the vision using new information from continual scanning and forecasting best practices. Therefore, it is possible to revisit the visioning stage and make the concept more strategic, especially after engaging in other phases of the foresight process (Schoemaker & Gunther, 2002). Organizational leaders use many foresight methods to shape the future and avoid entering a reactionary state by leaving the future up to chance.

A compelling vision reflects, to a degree, the "nature of triggers that spurred its creation" (O'Connell et al., 2011, p. 107). Visionary leaders memorize the narrative produced in the vision search and prepare to communicate it cold at a moment's notice. Strategic foresight helps leaders, managers, and team members to join in creating the collective narrative—not as the last stop, but on its way to creating a vision that they then translate into action. Visioning within the VUCA environment does not always result in a vision statement and often ends up with a good enough vision.

Reassessing a vision (statement) in a group format, based on consideration of external factors, can help leaders rewind and begin generating more consensus and buy-in through a shared understanding of why the current vision even exists. It also provides an early intervention strategy to help organizations avoid more drastic measures like restructuring. Instead of pounding their heads against a wall to figure out why followers resist the vision, they put the "good enough vision" on a road test to see how it performs for the organization. How do leaders increase buy-in when an organization is already operating based on a new or well-established existing vision? This question brings us to the theme of the next chapter.

A leader creates a link between the business environment and the strategic direction of an organization using strategic foresight—a common precursor to vision creation. The information pulled in during early-stage foresight activities helps entrepreneurs and founding teams conceive an image of their preferred future. Group foresight plants early seeds for vision acceptance. In this respect, foresight activities serve as early intervention strategies for vision adoption.

Summary

The natural sciences, evolution, and strategic foresight have demonstrated how occurrences in the external environment fuel an internal need for change. For example, ideas assemble through accretion during the conception stage of vision development and realization. Chapter 5 examined the vision search through concepts and practices such as idea accretion, strategic leadership, and foresight.

Here are a few takeaways concerning vision conception:

- The need for change is made imminent by factors in the organization's external environment.
- The organizational vision is not always actively created; it is conceived using the process of accretion to assemble the clues gained using foresight, insight, and hindsight.

- Visionary organizations should not overlook weak signals of change on the horizon.
- The numerous vision triggers, "containers," contexts through which vision emerges are critical for grounding vision in current realities.
- Strategic leadership competencies and the Foresight Maturity Model (Hines & Bishop, 2015) provide useful frameworks for integrating vision conception into an organization's more extensive direction-setting process.
- Reassessing a vision (statement) in a group format, based on consideration of external factors, can help leaders rewind and begin generating more consensus and buy-in through a shared understanding of why the current vision even exists.

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5 Vision Adoption: Rewinding to Get Ahead

One thing that CEOs sometimes forget is the importance of shared vision. They tend to believe that once they communicate their vision, employees accept and cherish it immediately. However, to make your vision a collective and shared commitment of the overall organization, you must communicate it repeatedly and reinforce it through various means, such as socialization, evaluation, and compensation.

(John Sosik and Don Jung)

Viridian was a fifteen-year-old, family-owned government contracting business.[1] Explosive, overnight growth caused by winning a series of large-scale contracts placed this Inc. 5000 firm in direct competition with major industry players. Until this period of high growth, Viridian had grown organically by winning small business contracts through the federal government. The uncertainty associated with the sudden transition from small to large business status caused significant anxiety and discomfort for the Founder-CEO. As a result, he instructed senior managers to examine how large companies operated. (Viridian's managers engaged in foresight activities, but like so many organizations, the process needed to be more structured and allowed to run its course. The leaders used strategic foresight tactics but needed to gain knowledge of the recommended process. More on this method is discussed in this chapter). Without adequate feedback from outside experts, middle managers, or employees, top managers conducted competitor and market analyses and presented their findings to the Founder-CEO. Senior leaders rolled their conclusions into a unilateral decision to initiate a series of sweeping changes in quick succession.

Before Viridian became a large business, senior managers had decided to accelerate the growth process through mergers and acquisitions. As with most M&A initiatives, this decision appeared solid on paper. The senior leadership team hastily stitched together a plan to restructure the business. To ease the founder-CEO's

[1] The company's real name has been withheld to preserve confidentiality.

T. E. Anderson, II, *Visionary Leadership*, Future of Business and Finance,
https://doi.org/10.1007/978-3-031-67725-0_5

anxieties, the top management team reclaimed control of information that flowed through middle management, along with associated relationships with external stakeholders. Additionally, senior managers restructured reporting relationships and reconfigured job roles. The chaotic reorganization inadvertently hurled the culture of the new parent company, long heralded as "family-friendly," into an ad-hoc state. Adding M&A to a restructuring project and culture transformation initiative quickly intensified the situation's complexity.

Eighteen months into the process, the change initiative began to unravel. High attrition rates provide the most salient example, which resulted in a need for more human resources to integrate the businesses. The leaders' decision to initiate change without building participation from the ground up signaled a radical departure from the established culture, which began resisting the change effort. Shared values and goals, collaboration, and individuality are characteristic of clan cultures—Viridian was no exception. The Founder-CEO had breached the very culture he worked to establish and triggered far-reaching effects.

The new configuration and resulting organizational chart produced unintended consequences despite leadership successfully reclaiming control on paper. The two senior leaders rarely reported to the back office, so the structural changes created a decision-making bottleneck. Instead of navigating organizational complexities with their former autonomy, middle managers had to wait days and sometimes weeks for top management to sign off on important decisions. Over $1,000,000 in human capital exited the company within three years without proper knowledge transfer. Middle managers, specialists, and other critical personnel resigned or faced being pushed out of the organization. To date, Viridian's dysfunctional cultural undercurrent perpetuates turnover and undercuts new strategic initiatives. In a fight for survival during its first three years, Viridian's founder reconfigured reporting relationships, relinquishing control to middle managers in three areas: decision-making, knowledge and information, and interpersonal alliances (i.e., informal organization) with external stakeholders. While scaling the company, Viridian's Founder-CEO did not feel threatened by the expertise of his middle managers or their existing internal or external alliances. The CEO empowered middle managers to collaborate with external stakeholders and help the organization rebound from a previous crisis caused by losing multiple contracts. When the chief executive announced the reorganization, middle managers were familiar with company details that far outstripped the CEO's capacity and job function. Ironically, the managers' job role effectiveness worked well for the company but caused senior managers to feel powerless and out of the loop. Within eighteen months, the dynamic between senior and middle management descended into a power struggle, ending with the termination of critical HR and operations personnel.

The worst feeling for a leader is when team members decide not to follow. Such situations can keep the leader up at night thinking:

> "My people are not on board."
> "Things are not moving in the right direction."
> "There needs to be more uptake."
> "The vision [ends] after Jan 31st."
> "It just feels like my team has disconnected."

If you have experienced any of these thoughts, dear leader, you have made the most common oversight in visionary leadership. The good news is once you make and correct this mistake, the lesson will stick with you forever. The principle of this chapter reveals the oversight. The rest of the chapter contains the insight.

Principle 6:
Adoption is not an afterthought.

Why the Need for Adoption?

Vision adoption was a favorite topic of one V360 focus group. Two questions popped up during the sessions: (1) Why is it necessary to increase vision adoption? (2) How do leaders increase adoption? The first question was unspoken. It was the type of question leaders didn't know they had until it was answered. Once the first question was answered, they verbally asked the second. This section will answer the first question, and the next will answer the second question.

Counternarrative: The "Telling" Misconception

Viridian's founder-CEO began his shared visioning journey by telling the vision for change after implementation had begun. He assembled the troops, conveyed a strategic vision for expansion, and dictated the changes on the organizational chart. The CEO expected managers and employees to fall in line. Without employees having a line of sight, their alignment was short-lived. Because the new direction was a radical departure from the organization's history and identity, the culture fought the founder's strategy every step of the way. The lack of stakeholder inclusion in the visioning process resulted in conflicting interests, infighting, and a culture war. Ultimately, the board abruptly replaced the founder with a professional CEO.

A vision shared by telling may work in a crisis. The downside is that it also activates and deploys negative organizational antibodies to oppose or undermine the vision. These antibodies exist within the culture to ward off outside influences that disrupt the status quo. In traditional organizations, vision sparks organizational transformation and development. Antibodies attack a new vision when they perceive (i.e., see) it as a threat to the organization or, more specifically, to the culture and status quo. The statement "culture eats strategy for breakfast," which is widely attributed to Peter Drucker, underscores this phenomenon. An organization's culture, status quo, and the socio-technical system will attack a new component—no matter how big or small—when it perceives that component as threatening the organization. The strength of organizational antibodies makes all the difference and determines a vision's acceptance or rejection. Managing antibodies plays a prominent role in vision adoption.

Antigen: Imposed Vision

Top management often hires visionary leaders to "shake things up" or to revive struggling teams. New leaders impose their way of doing things on the team to make their mark or prove themselves. Imposed vision creates resistance from team members. There are ways to turn resistance into readiness. To increase buy-in, leaders should make sure the voices of followers and stakeholders are drawn out and amplified. Surveys, interviews, and focus groups give team members a voice.

An imposed vision functions as an antigen. A mandated vision is not shared throughout the organization, whether imposed from the inside or outside. In these cases, individual contributors are yet to have a shared experience that offers the social validation that naturally leads to collective acceptance of a new strategic direction. Leaders who apply undue pressure to force their agenda on team members deprive them of the freedom to choose. Leaders who engage their teams in vision adoption allow members to place their fingerprints on the organization's future. An imposed vision stifles the creative decision-making necessary for vision integration.

Vision is often developed and conveyed by a single leader or cadre of top managers. It is rarely co-created by stakeholders. Therefore, a fair number of organizations operate based on mandated vision. That is the reality. Consequently, it is necessary to surface and reevaluate assumptions about the imposed vision before devising implementation strategies. To surface their assumptions, leaders can recreate meaningful foresight experiences to connect followers to the future. Making those connections gives followers skin in the game. It also facilitates new discoveries and conclusions. If every founder and CEO treated their mandated vision as a done deal, it would be impossible to reverse the lack of acceptance. In Viridian's case, they could not stop the ongoing wave of employee terminations and resignations. Eventually, Viridian's entire vision ended up in the Adoption Pit (Fig. 5.1).

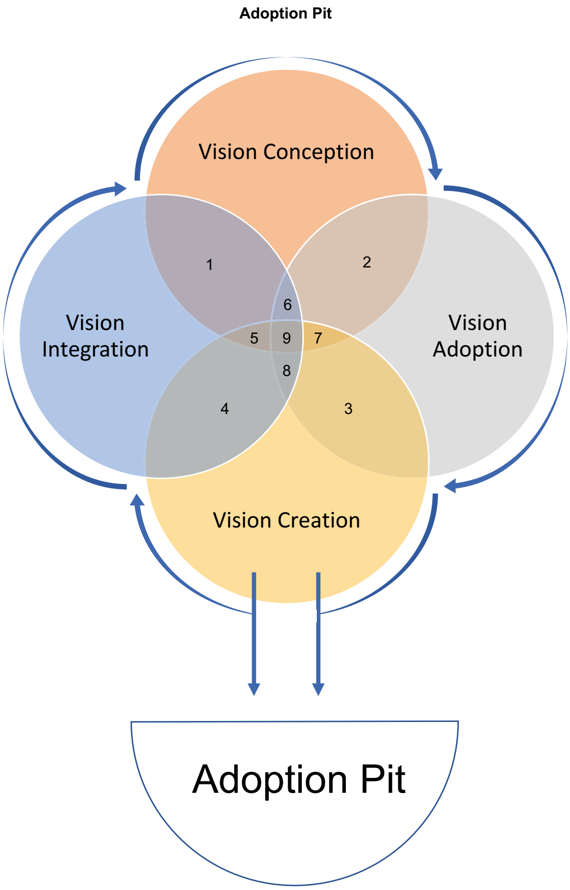
Vision iteration makes rewinding possible.

Top-Down Communication: The Achilles Heel of Visionary Leadership

The top-down approach to leadership starts easy—too easy. It is deceptively simple. As employees talk to each other about the changes, the complexity begins to rear its ugly head. An overuse, overreliance, or overextension of a top-down communication approach leaves complexities of leadership to manage themselves. Traditional visionary leadership uses a top-down approach too frequently and for too long. Top-down communication equals telling the vision.

The top-down approach helps CEOs and founders keep control of their companies, which is fine when they can do everything themselves. That's never the case in fast-growing companies and corporate enterprises. Entrepreneurs need team members with a range of skills to join their Vision Journey. They need people to adopt

Fig. 5.1 The adoption pit



their vision. Unfortunately, the overuse of the telling strategy does not increase adoption. The top-down communication of vision is what this author considers the Achilles heel of visionary leadership. It is crucial to understand where this strategy originated.

Let's add a little personification to visionary leadership. Can you picture what its birth certificate would look like? Here is a snapshot to set the stage.

Name: Visionary Leadership
Time: Circa 1985
Place: The United States of America
Parents: Charismatic and Transformational Leadership
Doctor(s): Warren Bennis and Burt Nanus

The visionary approach is a spin-off of transformational-charismatic leadership. It emerged from shifting economic, social, and leadership conditions in the United States. Here is the backstory. Until the transformational leadership era, the culture and identity of a business were primarily determined by its past. How things were done in the past determined how the company operated in the present. How does a leader call for followers to let go of the past? How do they inspire an organization to focus on the future? They paint the picture of a changing world. How did they do this without causing pandemonium? By talking about what their team can do in the present to better secure its position in an uncertain future.

The business environment shifted in the late 1980s and into the early 1990s. Established companies needed help increasing their competitive edge. Top managers needed to become more effective at leading in an environment where change was the norm. They sought to achieve these ends by encouraging their organizations to depart from the status quo, pursue new directions and possibilities, and increase agility (Conger, 2004; Kirkpatrick, 2004). So, leaders embraced the term "vision," which relates to foresight and goal achievement. The term seemed appropriate to describe how leaders could empower their teams to help the organization overcome the challenges of global competition, reduced technology development cycles, and shortened shelf-life of corporate strategies. These challenges prevailed at the end of the twentieth century (Conger). Visionary leadership changed the game, and the rest is history. Or is it?

In the 1980s and 1990s, visionary leadership became more popular. The followership movement was also gaining steam. The first camp focused on the charismatic leader standing out front, casting the vision, and getting the people to buy in. The second camp further shifted the leadership paradigm by digging into the symbiotic relationship between leaders and followers. The chasm between the telling and selling approaches reflects the split between leadership and followership. Traditional visionary leadership centers on the leaders who use their agency to tell and sell the future. The testing, consulting, and co-creating starting points honor leaders' relationships with followers and external stakeholders. Despite progress made in the 1990s, the contemporary VUCA context is again pushing the boundaries of the leadership context. The original paradigm will not meet the ever-increasing demands of twenty-first-century business, but Vision360 offers a new paradigm of visionary leadership.

The Complexities of Autonomy and Control

The telling and selling approaches are baked into visionary leadership theory due to the influence of charismatic-transformational leadership. Here in lies the problem. Telling a vision usually results in false acceptance. It is difficult to know if employees silently reject an unspoken vision or whether they genuinely accept a mandated vision as the best course of action. The need for job security can cause employees to feign acceptance of a vision communicated in crisis (Senge et al., 1994) and result in passive resistance. Time reveals employees' acceptance through what they choose to do and what they choose not to do.

The root cause of telling a shared vision is found in a chief executive's need for autonomy. Let us zoom out to get a clearer picture of this phenomenon. A founder-CEO starts a business built on their personal vision, which includes a better life for themselves and their families, more fulfillment and engagement in their work, and the commitment to a mission to serve a group of customers. A yearning for this life is their driving force; no one forces the direction for an entrepreneurial venture on a founder. It grows organically from their professional and personal experience and desires to fulfill an unmet need. Founders and CEOs increase adoption by inviting team members to bring their vision to the table. They also increase buy-in when recreating visionary and foresight experiences for team members. Such actions increase shared understanding, which is essential for team members to accept a collective vision as their own. The founder should let everyone get their vision out into the open but stop short of making upfront promises about what vision the organization will ultimately adopt.

In my experience working with multiple startups, I have noticed CEOs will guard their autonomy with control of the business. However, when organizations need disruptive change leadership, a Founder-CEO's unmitigated control can become more of a liability than an asset. Such was the case with Viridian. To survive a crisis in its startup phase, the owner partially relinquished control to trusted middle managers in a push to grow organically. An entire culture had developed, entrenched with beliefs about the leaders, the company, and the future. Reclaiming control from middle managers initiated a ripple effect, causing speculation, uncertainty, and anxiety about a potential new direction. In reasserting his dominance over the organization, the founder-CEO induced intergroup conflicts that undermined real growth.

At times, a leader's emotional attachment to their business wages war against logical and practical action. This dynamic is on full display when leaders struggle against the impossibility of their omniscience. In other words, a leader or individual contributor can't know everything that happens inside and outside an organization. Knowledge is power, and those who know more than the leader in a particular functional area establish a power base. Organizational theorist Gareth Morgan (2006) listed fourteen sources of power in organizations—six of which refer to control. The risk of a leader admitting they are not all-knowing makes room for another person's power base. Because empowering followers is necessary for growth, Chap. 9 discusses the Autonomy-Empowerment Paradox at length.

Given the history of CEO replacements and hostile takeovers, founders should concern themselves with maintaining ownership of their businesses for as long as they choose. However, a leader's desire to maintain *absolute* control of their enterprise is the most widespread and formidable enemy of shared visioning. This desire is an outgrowth of Founder's Syndrome, discussed in Chaps. 1, 6, and 9. Incidentally, the struggle to keep control does not discriminate based on company size, stage, or industry. Founder-CEOs of fast-growing companies, Fortune 500 executives, and social entrepreneurs all face the challenge of maintaining control of the business. This problem is not reserved for companies seeking venture capital. Balancing control with creativity presents leaders with a continual dilemma. Holding the reins too loosely can increase vulnerability, result in sub-par expectations, and cause daily operations to go awry. Holding the reins too tightly will likely stifle creativity and the emergence of new ideas. Some successfully rise to meet the challenge, others not so much. Moreover, underlying issues culminating in long-term passive resistance often masquerade as short-term successes.

Control assumes various forms. As a business matures, leaders operationalize stabilizing values such as consistency and predictability to sustain organizational performance. Whole group discovery processes and cultural islands allow senior leaders and managers to temporarily suspend their authority within environments controlled to deliver collective outcomes such as creativity, strategic thinking, and relationship building. This alternative use of control allows stakeholders to share genuine feedback without fear of repercussion in an environment conducive to psychological safety. These types of environments facilitate vision emergence. See Chap. 7 for more on containers for vision emergence.

Counternarrative: Vision Can Be Accepted or Rejected

The hard truth for Founder-CEOs and charismatic leaders to accept is that their vision can be accepted *or rejected*. And demanding acceptance is not sustainable. Despite some Founder-CEOs treating vision as an imperative, followers have the option of accepting or rejecting the vision. To mitigate polarizing effects, leaders should plan for the period of vision adoption. Rogers (2003) defined adoption as "a decision to make full use of an innovation as the best course of action available," and in relation to its counterpart, rejection, which is "a decision not to adopt an innovation" (p.21). When leaders guide the vision creation process with an eye toward what it will take for organizational members to accept the collective vision as their own, they increase the likelihood of vision adoption.

Suppose leaders fail to create buy-in during their conception phase. In that case, an organization will not have enough momentum to move through adoption and little hope for successful creation and integration—without rewinding. Leaders should bring stakeholder groups in earlier than the adoption phase. Strategy development literature supports this participatory approach and advises leaders to involve managers and team members earlier in visioning and strategy making. Increasing the number of people engaged in strategy-making also increases the complexity, which must be well-managed by an internal or external facilitator.

Net Gain: The Key to Vision Adoption

At the crossroads of change, an organization faces the challenge of learning to see in a new way. It's not about upending the status quo without a larger purpose. It's about finding new patterns of behavior and coordination that align with the direction. However, people have free will, and when given a choice, they will choose the status quo unless the vision seems more appealing than their present situation. They must also perceive the change as beneficial. If followers sense they will gain more than they lose, the choice to make the necessary adjustments becomes easy.

Organizations change course and move forward due to the agency of the executive leader in partnership with other significant leaders and stakeholders throughout the organization. Leader agency (i.e., the job of internal and external leaders) orchestrates productive exchanges and opportunities for healthy relationships to grow out of repeated interactions. When change is afoot, and a leader introduces vision, the leader initiates, facilitates, and oversees the shifting status quo. In redirecting the organization, the leader unfreezes the pattern of interactions between individual contributors and their respective teams.

The need for adoption usually lies in wait like a predator stalking its prey. It waits patiently until the time for team members to accept the vision as their own. Then, it pounces and takes down a perfectly suitable idea—no matter how big or small. If vision adoption seems to be slipping through your fingers, it is time to rewind.

Rewind: Getting Ahead of Buy-In

Have you ever heard someone shake their head in regret, sigh, and say, “If I could just turn back the hands of time…”. Maybe you were that someone. Chapter 3 demonstrated that loops make it possible to rewind. (Or at least they give the appearance of rewinding.) Leaders should revisit earlier stages of vision development to increase follower support through shared visioning.

Lessons on Rewinding from Insight Selling

The rewind concept of Vision360 originates with insight selling. This strategy advises salespeople to lead with disruptive ideas, make customers aware of unknown needs, and enter the purchasing process at an early stage when clients are assembling the vision for what they want (Adamson et al., 2012). Solution sales, the predecessor of insight selling, worked because customers could not solve organizational problems despite deep understanding; now, they can more aptly define suitable solutions. Solutions sales representatives who enter the process at the 60% completion mark need to play catchup, as they have entered in the middle of the conversation.

Sales reps are learning to engage potential clients in novel ways much earlier in the sales cycle. Adamson et al. (2012) explained:

> The star sales rep uses [requests for sales presentations] to reframe the discussion and turn a customer with clearly defined requirements into one with emerging needs. Even when he’s invited in late, he tries to rewind the purchasing decision to a much earlier stage. (Strategy #1 section, para. 11)

Additionally, high-performing sales reps have begun “targeting agile organizations in a state of flux rather than ones with a clear understanding of their needs” (Adamson et al., para. 3).

Just as sales reps engage clients far before reaching the 60% completion mark, Founder-CEOs can begin to engage employees, managers, and other stakeholders in a concerted effort and earlier in the process of vision development and realization.

Innovation and transformation expert Matthew Heim advises leaders to consider and minimize the risks of this method by level-setting expectations. Prospective members of new teams should understand they are buying into a vision that promises to deliver a unique future product. Rewinding holds the need to get ahead of buy-in and increase acceptance in tension with the reality of a potential failure to launch.

Getting ahead of the need for buy-in undergirds Vision360. It's not that the leader necessarily needs to cast a new vision. Instead, visionary leaders can return to an earlier stage of the Vision360 process to involve more stakeholders. Shared visioning yields more fruit than lone visioning when leaders intentionally involve stakeholders earlier in the process instead of when facing severe adversity. Like sales representatives who enter the process ahead of an RFP, leaders who invite followers and managers into processes of visioning and strategy at earlier stages increase buy-in for later stages of implementation. The 60 percent mark is too late. Stakeholder groups should be represented from the beginning of the direction-setting process and its associated activities. Rewinding happens by taking another loop and engaging in a more advanced level of shared visioning.

If a leader's main challenge is getting people to "buy in" to the vision, the organization or team needs to rewind to an earlier stage to involve more stakeholders in the vision development process. Rewinding yields increased buy-in.

Leaders should meaningfully involve stakeholders in the vision development process from the outset. Such involvement increases buy-in to the vision and commitment to the resulting change effort. A mandated vision may not generate the buy-in needed for acceptance. The good news is organizations can leverage the information and assumptions contained within that imposed vision. Organizations travel through various stages and loops of the shared visioning process while learning to see together. Therefore, it is possible to revisit prior stages of vision development and even correct missteps while moving through the nine zones of vision iteration. Following the precedent of double-loop learning (Argyris, 1997), rewinding enables leaders to take a second loop and examine assumptions feeding into the new vision and direction (Figs. 5.2 and 5.3).

Starting Points for Shared Visioning

Audacious ideas for the future are developed and realized when visionaries guide their organizations through multiple rounds of the Vision Journey over its lifetime. Getting people on board with a shared future vision can feel like a monumental task for even an experienced senior leader. Management expert Peter Senge et al. (1994) proposed five starting points for shared visioning (Fig. 5.4). Former Microsoft CEO Bill Gates' now-famous Internet Tidal Wave Memo incorporated multiple approaches to shared visioning to increase adoption and strengthen the company's position among competitors in the late 1990s. Leaders select their starting points

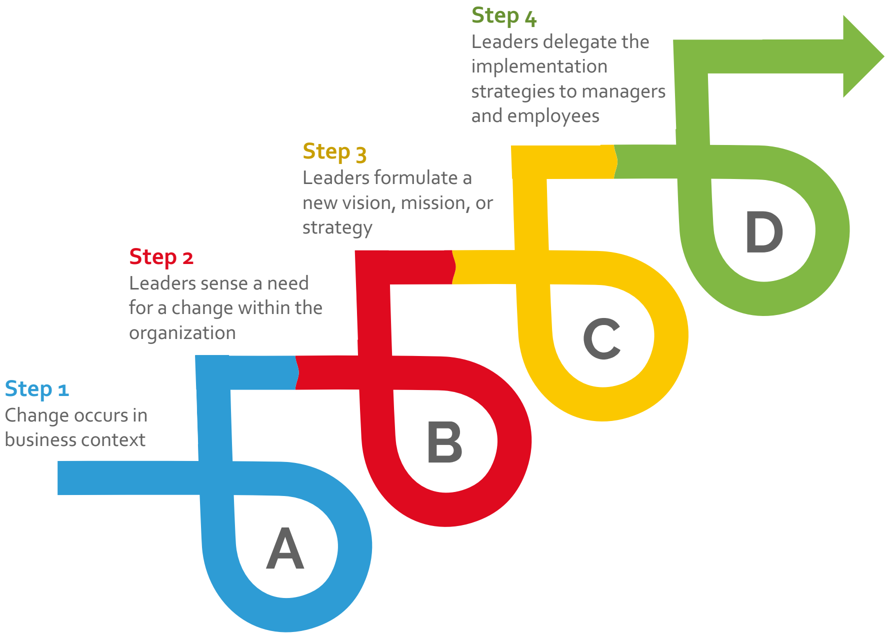


Fig. 5.2 Single-loop visioning using leader agency

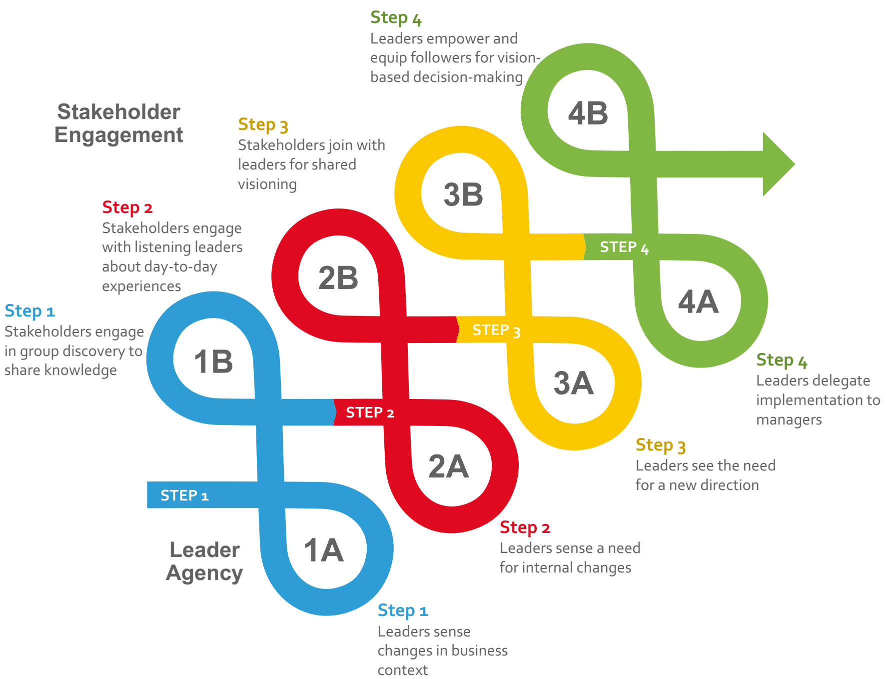


Fig. 5.3 Multi-loop visioning using leader agency and stakeholder engagement

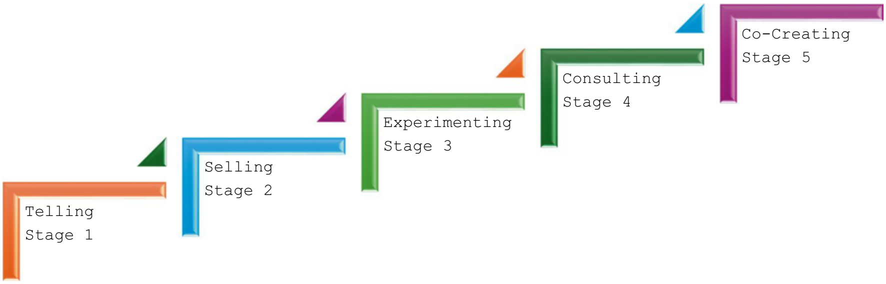


Fig. 5.4 Maturity levels of shared visioning (Senge et al., 1994)

based on urgency and the type of collective experience desired. Personal, follower, and organizational readiness should be considered also.

Telling represents the first starting point for shared visioning. The leader knows what the vision should be and compels others to share in their excitement. The consequences of resisting the new direction can be steep and include job termination. The organization's role is to follow the boss' vision. The stakes are high when a shared direction is conveyed through telling during a crisis. The organization's existence, the leader's job, and employees' livelihoods hang in the balance. Opposition and resistance can equal career suicide as well. The apparent strength in telling a vision is the potential to initiate immediate action. These strengths come at the expense of several weaknesses, including passive resistance, leader frustration, and positioning stakeholders as passive recipients. The urgency for followers derives from the boss' sense of urgency rather than a deeper understanding of the situation. Therefore, the leader may use force and coercion to demand compliance. Charismatic-transformational, authoritative, and transactional leadership approaches are most closely associated with telling.

Selling is the second starting point for shared visioning. The leader knows what the vision should be, understands the risks of demanding compliance, and needs to get to the "yes." Therefore, they enlist or enroll employees in vision development and realization. The organization's role is to buy in, commit to, and support the boss' vision—the lack of either presents an associated challenge. The time horizon for a vision sold is slightly longer than a vision told, but not by much. The leader, who encounters active and passive resistance from followers, may be inclined to use manipulation tactics and forced compliance to address a lack of buy-in. When unable to successfully enlist supporters, leaders may try to sell harder and even use the telling approach. Participatory and visionary leadership approaches have become tools in this mode.

Many organizations do not practice higher levels of shared visioning. Instead, they operate based on a future envisioned by the founder, who shared the vision using the telling or selling starting point. According to the situational leadership model (Hersey & Blanchard, 1982) and the shared visioning process (Senge et al., 1994), telling and selling approaches correlate with low follower and organizational readiness. The opposite is true for the three mature starting points.

Higher levels of shared vision call for a new mindset or a paradigm shift within the leader's life. The transition is simple in theory but arduous in praxis, particularly for Founder-CEOs. This new approach requires a leader to stop thinking about vision as a mandate and instead treat it as an innovation that can be accepted or rejected by members of the organization (Kohles et al., 2013; Rogers, 2003). In this case, vision becomes an experiment—a loosely held assumption or mental model designed to increase adoption and buy-in from the outset. This *modus operandi* requires a great deal of inner work, self-awareness, self-management (and overall emotional intelligence and formation!) on the part of a leader—especially for a leader who desires to be always in control. The concept of an experimental vision designed for internal market testing brings us to the other side of the shared vision continuum.

The third starting point is *testing*. At this stage, the leader has a general idea of what the vision should be and wants to gauge follower reactions before moving forward. The organization's response to the proposed future is of interest, and the leader wants to know what excites people. A medium to high capacity for personal mastery within the ranks yields better results than lower capacities. Good vision tests depend on followers' perspectives and willingness to be straightforward about current realities. The desired outcomes of this approach include acceptance, enthusiasm, and identification of stakeholder interests. Potential challenges include rejection, indifference, lack of energy, and unexpressed interests. Leaders proactively address resistance by inviting stakeholders to share their opinions, which helps them feel heard and increases the likelihood of open discussion and consideration of the proposed vision. In turn, leaders can use authentic responses to refine and redesign the vision (i.e., "re-versioning"). This approach resembles participative leadership and reflects design thinking principles. False affirmative responses can negatively impact accountability and progress. Because employees cannot share a full range of ideas and concerns in such an approach, it is essential to supplement the test with interventions such as focus groups to move the organization to its next stage. Testing, or experimenting, helps leaders bridge the chasm between solitary visioning activity that originates with the leader in the telling and selling modes and the more collective approaches. Vision testing introduces tension between the paradigm of a good enough vision and a vision statement. It also aligns with Steve Blank's (2013) perspective of a startup as a temporary organization where a founder's vision sparks venture development.

Consulting represents the fourth starting point for shared visioning. Before asking team members, "What vision do you recommend we adopt?" executive leaders and middle managers must face their implicit assumptions about top-down communication. If not, these underlying beliefs will surface during a conversation or facilitated session and play tug of war with realities on the ground level. Such realities hold that "the most significant elements of a vision are almost always local, anchored to a team, work unit, or place" (Senge et al., p. 322). Because the boss recognizes the impossibility of one person knowing all the answers, their role is to assemble a vision and determine associated content, direction, and next steps. The organization's role is to strengthen the future direction by providing creative input.

Receiving new ideas requires leaders to be willing to listen without prescribing solutions or becoming defensive. A vision shared in this manner thrives off recommendations and suggestions generated through full engagement in strategic thinking. Leaders and followers should fully consider the consequences of any recommendations to preempt future conflicts and surprises.

The consulting approach is unique as it begins “bringing together multiple visions in an organic, interdependent whole” instead of creating a vision in a typical top-down fashion (Senge et al., 1994, p. 322). The consulting approach comprises both potential risks and challenges, including the overwhelm associated with considering many options and the sheer volume of options that may exceed the boss’ capacity. Organizational members may perceive the act of vision creation as belonging outside of their purview. Additionally, a middle-of-the-road or “compromise vision” may emerge from the applied pressure to finish vision creation quickly, combined with a reluctance to alienate particular stakeholder groups. Hesitancy in these areas may cause leaders to revert to the testing approach while increasing their personal and organizational capacity for surfacing mental models underlying the recommendations.

Co-creating is the ultimate starting point for shared visioning. Leaders work with members in a collaborative process with the goal of creating the future—one that represents individual and collective aspirations. The organization collaborates with the boss to articulate a common sense of purpose and build a shared vision. This exercise is not pie-in-the-sky. Leaders and followers also work together to define points of primary importance in a team’s work. Associated challenges can include working through dilemmas, examining values, and making sense of an emergent hierarchy of meaning. Regardless, co-creating the preferred future allows followers to work toward what they desire to build rather than trading labor for a paycheck. Co-creation places members in a creative orientation, empowers stakeholders to make choices, and draws forth aspects of personal vision. The desire to shape the future actively and collectively serves as one indicator of readiness for this approach.

The 2008 reinvention of Starbucks represents the antithesis of the Viridian example mentioned at the beginning of this chapter. With founder Howard Schultz back at the helm, Starbucks co-created its future direction—they reinvented themselves and collaborated to create its future. Such a level of whole-group visioning helps to minimize and counteract antibodies. It also honors the social and intellectual capital of and between team members. Starbucks met its moment by deploying the proper intervention at the right time with the right approach to correct its course and transform its status quo after the Great Recession of 2007–09.

Vision unfolds in loops, phases, and progressions instead of linear patterns. Therefore, rewinding is possible even though time only moves forward. It does not involve time travel in terms of science fiction. Instead, leaders can revisit earlier stages of vision iteration, as explained in Chap. 3. Two stages are listed below: crystallization (Zone 6) and translation (Zone 5).

Vision Reflection

A vision has to be embedded in every facet of a business to be successful. The vision crystallizes into definite forms, and leaders convert the image of the preferred future into tangible forms. Vision reflection precedes and facilitates vision translation. Vision adoption centers on vision translation (Zone 5) and crystallization (Zone 6). This section proposes vision reflection as the beginning stage of the adoption process.

The process of light refraction offers a unique perspective on vision reflection. First, read the light refraction narrative in Fig. 5.5. Then, you can review how I recontextualized this process for organizational vision development and realization in Fig. 5.6.

Vision reflection marks the beginning of the adoption process.

Lines of Sight

Chapter 1 highlighted the importance of lines of sight in teaching an organization to see. The Vision Reflection and Translation narrative explains how organizations create sight lines. A vision could reflect the perspectives of some stakeholder groups but not others. All units of the organization must have a line of sight to get a glimpse of the big picture. This line must extend from where they are to where the vision is. Their position—which includes their job role and location within the organization—determines how they see things. A stakeholder's position determines their

Light Refraction Narrative

When ***a beam of light*** passes through a ***prism*** at an ***angle***, the ***waves*** making up the ***light*** slow down when passing through the ***glass***, returning to normal speed only after exiting, causing the ***white light*** to split into a ***rainbow of color*** when hitting the ***glass*** at an angle.

The ***angle*** of ***refraction*** for each ***wave*** depends on how much it ***slows down*** when hitting the ***glass***. That's why it helps to look at the ***waves*** one ***color*** at a time. The ***prism*** is set up ***at an angle and not perpendicular to the light***. This way, onlookers can ***see the constituent properties of each ray*** along with differences in the ***speed and direction*** of the ***rays*** within the ***prism***.

The ***rays/colors*** get separated when first entering the ***glass*** on an ***angle*** and they spread out even more when speeding up on an ***angle*** when they leave the ***glass***. They slow down by different amounts in the ***glass*** due to their different ***wavelengths*** – ***short wavelengths*** take longer to travel through glass because **light** ***interacts*** with ***electrons in molecules*** making up ***glass***. ***Longer wavelengths*** (e.g., red) ***interact*** less, and slow down less. ***Shorter wavelengths*** (e.g., violet) ***interact*** more, and slow down more. Hitting ***glass*** on an ***angle*** and different ***wavelengths interacting*** at different amounts with ***electrons*** in the ***glass***, makes ***light*** hitting a ***prism*** spread out into a beautiful ***spectrum of color.***

This prism analogy can function as a container for Vision360, and the light refraction narrative can transform into a vision reflection and translation narrative.

Fig. 5.5 Light refraction narrative

Vision Reflection and Translation Narrative

I have translated the Light Refraction Narrative into the language of vision, strategy, and organization development. The words in bold have been changed to fit the new narrative:

When ***a leader's new vision or preferred future*** passes through a ***container or crystallized structure*** *(e.g., organization, team, planning prism, BSC, whole group session)* with ***a distinct mission, purpose, or agenda***, the ***assumptions/values/components*** making up the ***vision*** slow down when passing through the ***container/prism*** *(e.g., whole group discovery session).* These ***components or values*** only return to normal speed after exiting, causing the ***collective vision*** to split into an ***array of shared perspectives*** when hitting the ***container*** at an angle.

The ***degree*** of ***transforming*** each ***perspective*** depends on how much it shows ***resistance*** (i.e., slows down) when hitting the ***container*** (e.g., prism). That's why it often helps to consider the ***perspectives*** of one ***department, team, and business*** unit at a time before fully exploring the relationships between them. For example, the ***container*** (e.g., planning prism) is set up ***with a specific purpose*** that ***enables the vision to be seen from its constituent vantage points***. Organizational actors can see differences in ***the velocity*** of each ***perspective*** within the ***container***.

The ***overlapping points of view*** get separated when the vision is engaged within the ***container*** according to the ***purpose,*** and they spread out even more when speeding up on a ***mission*** when they leave the ***container***. Due to different purviews, they slow down by various amounts in the ***container*** *(i.e., some groups work faster than others)*. Organizational members with ***narrower purviews*** **and shorter time horizons** normally take longer to travel through containers because they ***<u>interact</u>*** with people, processes, and systems in more ***depth*** and ***detail.*** Stakeholders with ***wider purviews and longer time horizons*** (e.g., the "C-suite") ***<u>interact</u>*** in less depth and detail and, therefore, slow down less. Team members with ***narrower purviews*** (e.g., violet or operations/service providers) ***<u>interact</u>*** more deeply and slow down more. Thus, interacting in a shared experience at varying levels with colleagues who have **different journeys, values, viewpoints, and time horizons** (e.g., **vision translation process**) causes a preferred future ***vision*** to hit the ***planning prism*** and diffuse throughout the organization in a **common, yet nuanced, direction**.

Fig. 5.6 Vision reflection and translation narrative

perspective. An individual contributor's perspective is more powerful than they may realize. It determines how you see things and is very unique to your experiences. How you see things partly determines what you focus on. Create lines of sight and team members will start to fall in line when they see what you have been saying all along.

A crystallized vision reflects and represents the multitude of perspectives within an organization. Using a combination of vision emergence and translation, leadership teams crystallize a big idea into strategies for implementation. The Balanced Scorecard (Kaplan & Norton, 1992), along with its four organizational perspectives—financial, customer, internal business processes, and learning and growth—is one of the most popular tools for doing so. Even more relevant for Vision 360 are the underlying assumptions of the BSC.

The paradigm of vision reflection bridges emergent visioning (Zone 4) and vision translation (Zone 5) using the containers for vision emergence. Values, occupational culture, and functional departments act as containers that provide multiple organizational perspectives, like the four vantage points offered through the Balanced Scorecard.

Insights on Preventing Generation Loss

I witnessed the importance of qualitative information that surfaces during such interactions during a team visioning session conducted with a relatively new venture. The team wanted to cover shared visioning and move into goal setting because it was a beginning-of-the-year session. After discussing personal vision and values, the conversation shifted and lost momentum as team members began considering growth goals. The group committed themselves to unpacking their core values. They encountered a roadblock when attempting to translate their values into a shared vision. Had we moved too quickly into translating vision into a goals system, the team would have missed an essential point of curiosity about their culture—their hesitancy to commit to stretch goals. Please understand this group had successfully established a thriving consulting firm. The team excelled with operational goals associated with the core business. However, goals that were more visionary and long-term gave them pause. This hesitancy was likely due to the life stage and the culture forged through their successes, combined with several personal and individual factors. At the end of the session, the team went the extra mile and courageously questioned the patterns derailing their shared visioning sessions. This team's shared vision was in a gestational period, being incubated and ultimately birthed through its values. Through this experience, the team created a beta version of their vision, even if it has not yet been formalized.

Big ideas lose their pizazz when reduced to linear strategies and plans in poorly executed attempts at translation. The essence of the idea can be lost in a sea of details and logistics. Olson and Eoyang (2001) warned against moving too quickly into translating vision into outcomes and goals, instead giving proper attention to exchanges in the system that hold the power for transformation. Such interactions put significant differences, or the gap, between the vision and reality on display. In bridging the gap, the appropriate levels of adaptability and richness at the source of the vision are placed on display. Such qualities are found in the interfaces between different containers within the organization. (See Chap. 7 for a list of containers for vision emergence.) Perceptive leaders use the richness and adaptability of a vision to increase its adoption.

Several considerations will prevent generation loss in the translation process. First, leaders should promote visual thinking to unleash team members' creativity and preserve the integrity of new ideas. The translation process becomes less rote and more dynamic as the team transforms the vision into a tangible form. George Cormack tinkered with the prototype for a nameless cereal, creating 36 iterations before learning how to prevent the flakes from turning to dust while inside the cereal box (General Mills, 2021). Once he had perfected the recipe, the parent company held an internal competition to name the cereal, and decision-makers chose the name "Wheaties." Visual thinking allows teams to get a product in the hands of potential users soon enough to invite and incorporate feedback on essential features to include. This form of rapid prototyping produces a minimum viable product or MVP. Product developers use rapid prototyping to fail forward, which ultimately increases their chances of successfully launching a new product to the mass market in the long term. This method is beneficial in high-stakes situations when the rate of failure is high. Visual thinking works for departmental and product visions as well as organizational visions.

Second, leaders should occasionally revisit the "why." The triggers that prompt a vision search infuse it with meaning. The vision could have emerged in response to purposeful planning for the future, giving leaders more time to invite diverse stakeholder perspectives. A crisis may have prompted the vision as organizational performance had hit an all-time low. A new leader may have taken over and imposed their values and vision onto a mature organization, causing the culture carriers to revolt. The backstory carries significant meaning and clues for the longevity of the current vision. All futures have a shelf-life.

Third, overly optimistic leadership cultures can negatively impact the translation process. Organizations that mandate employees view every situation with rose-colored glasses impede strategic thinking and restrict authentic feedback. Leadership expert Susan Scott calls this phenomenon "legislated optimism," which functions as a negative antibody in far too many organizations and leadership cultures (Scott, 2009). Vision is a new idea and is naturally associated with change. Team members cannot change their perspectives and routines overnight or on demand. Change takes time. Leaders who force acceptance may win in the short term, but the truth of how employees feel will eventually come to bear. Legislating optimism delays the reckoning day.

Replacing Concrete Plans with Crystallized Vision

Why did traditional strategic planning stop working? In the 1980s, the focus of leadership studies shifted to explore the reciprocal relationship between leaders and their followers. The leadership narrative became more inclusive of the idea that followers implement the strategy (Bennis, 1999; Kellerman, 2008; Kelley, 1988). Other difficulties included creating links between vision, strategy, action plans, and performance measures (O'Brien & Meadows, 2003). In the twenty-first-century strategy development initiatives, leaders began involving more people in the process, using cross-functional teams, and delegating select strategy-making activities to customer-facing team members (Mason, 2007). The idea of a leadership team simply creating and then managing strategy left more to be desired, so contemporary organizations have changed the way strategy is developed and implemented. This section will unpack two twenty-first-century approaches to crystallizing and translating vision into strategy. The first is emergent strategizing and the second is strategy-making as a learning process.

Emergent Strategizing

Strategy is the vehicle for turning a vision into action. Daft (2011) stated, "strategy provides direction for translating the vision into action and is the basis for the development of specific mechanisms to help the organization achieve its goals" (p.397). A poor understanding of what needs to be accomplished can render the translation of vision into goals (Sosik & Jung, 2018). Strategy fulfills its purpose when it effectively translates future vision into present action and falls short when it fails to do so.

The VUCA context increased complexity in the business environment and paved the way for emergent strategizing. Ackerman and Eden (2011) described emergent strategizing as "muddling through in a manner that reflects the culture of the organization—the habits of thinking and behaviors" (p. 112). The beauty of emergent strategy lies in its proximity to reality instead of being relegated to monthly, quarterly, and annual reviews (Davies & Davies, 2010). When leaders stop imposing vision and allow it to emerge, it is difficult to restrain the resulting creativity by forcing it into the box of traditional strategic planning. Emergent strategizing provides a viable alternative.

Goals System

What do the words "goals, vision, strategy, and resolutions" have in common? What implications do "behaviors and habits" share? What about "values?" The first set of words is closely associated with experiencing or achieving a new outcome. The second set represents the actions required to achieve new outcomes, such as goals and visions, or to maintain those that have already been accomplished. The word "values" deals with a person's underlying beliefs and assumptions that give life to their desired outcomes.

People set New Year's resolutions each year. Teams set goals all the time. Organizations may change or update their vision periodically. What many need to realize is that all of these outcomes and inputs are related. They are designed to work within a goals system. Each has a different function that relates to the other. When you isolate goals and separate them from vision and values, they become more challenging to achieve. When vision, goals, values, behaviors, and habits are placed within a system, individuals and organizations can reach them more easily. Values tell a leader if their team has set the right goal. Habits and behaviors will indicate if their vision is expected to move in the direction of the vision and strategy. The discipline needed to reach goals is walked out every day through employees' habits and behaviors.

The goals system represents one application of emergent strategizing. Ackerman and Eden (2011) explained how mature organizations can use vision reflection and an existing goals system to reverse engineer a vision statement. Every visioning session will not end with the creation of a vision statement; however, vision and mission statements are vital components of an organization's goals system.

Types of Values

Organizations learn to see using their values as a corrective lens. According to Hultman and Gellerman (2002), values can be classified in at least five ways: time orientation, needs satisfaction, degree of realization, effectiveness, and organizational levels. The time-orientation category includes *terminal* and *instrumental* values. Terminal values are long term, and instrumental values lead to the terminal values. Needs satisfaction values include *defensive* values that protect against perceived threats, *stabilizing* values that maintain the status quo and aid in adjusting to society, and *growth* values that foster progress or forward movement. The degree of realization values class includes *espoused*, *actual*, and *desired* values. Values can be considered *effective* or *ineffective*. They can also be classified at the *individual/personal*, *interpersonal*, *team*, and *organizational* levels.

On the one hand, vision is most closely associated with terminal and growth values due to its association with the future. On the other hand, the realization of a vision encompasses the entire range of values. Values also moderate the relationship between vision and ethical behavior.

Growth Strategy

Growth strategies place variance in organizational values on display. High-growth companies live out different values than firms with more stable growth. In a systematic review of 39 empirical studies examining high-growth firms (HGFs), Demir et al. (2017) identified five strategic drivers of high growth: human capital, strategy, human resource management, innovation, and capabilities. The values associated with these growth drivers will shape what opportunities an organization sees and perceives as a threat to its status quo.

Existing companies use a mix of values when planning for growth. The values shape the critical decisions about funding, hiring, and strategic priorities. Microsoft, IBM, and Amazon grew through market dominance. After about a decade of acquiring smaller startups, Facebook and Google decided to restructure their businesses. Both companies balanced stabilizing values with growth values by starting new parent companies and placing their signature brands under the umbrella. Facebook came under Meta Platforms‘umbrella, and Google became a subsidiary of Alphabet. The restructuring allowed both companies to pursue moonshot projects without putting the core business at risk in the short term. Such strategic moves have worked in more traditional industries for decades. Alcoa‘s series of restructuring is a most recent example. In April 2024, 3M spun off its healthcare division, giving birth to Solventum Corporation. As companies expand, growth strategies get more complicated. During lean times, companies often employ a retrenchment strategy rooted in defensive values. Starbucks used this strategy during the Great Recession when it closed several hundred stores that had previously opened during nearly a decade of global expansion. During a period of unprecedented growth, Blackberry (then known as Research in Motion) was blindsided by Apple’s aggressive growth strategy. Because Blackberry initially saw the iPhone as a minor threat, it didn't deploy the defensive values in time to protect the company from market share erosion. Former video giant Blockbuster passed on an acquisition of Netflix prior to the online streaming revolution. At the time, the benefits of Blockbuster's fee-based business model outweighed the risks of an acquisition. A new vision and the changes necessary for its realization can pose a threat to the stabilizing values currently supporting an organization's status quo—or at least change-averse team members can perceive a vision this way.

Other companies like Spanx and ActOne grew primarily due to bootstrapping. A disproportionate number of women and minority-owned businesses use self-funding strategies. In the last few years, more investors have started to fund businesses founded by underrepresented founders. Only in recent years has Spanx's CEO Sara Blakely used outside funding to fuel expansion.

Case Example: People-First Values at Starbucks

Howard Schultz has reprised his role at Starbucks twice. His encore performances have refocused Starbucks on its identity. A large part of Starbucks'identity was expressed by the retired president of Starbucks International, Howard Behar, who highlighted Starbucks' terminal value, declaring, "we're not in the coffee business serving people. We're in the people business serving coffee"(Schultz & Yang, 1997). People-focused core values aid Starbucks in staying focused on its true north while navigating uncertainties within the business environment.

Employees and customers can sense when a company's strategy centers on serving them. Unfortunately, the people strategy in too many companies is siloed within human resources. Starbucks' success centered on educating customers and partnering with employees to pursue a commonly held vision. Starbucks leaned into the expertise of its employees, who educated customers about the company's products. The authenticity of the product helped establish Starbucks as the customers' "third place"(Schultz & Yang, 1997, p. 118). I experienced this firsthand as a barista in 2011, memorizing more than 50 drink recipes. The training involved learning about maintaining superior quality standards that customers expect from the Starbucks experience. The training topics spanned ethical sourcing and coffee tasting to recommending dessert and breakfast items to complement chosen beverages.

Case Example: Scaling While Preserving Quality

Cooking for a family of four is vastly different than cooking for a dinner party. Advanced skills and larger containers are required to feed large groups. Even when cooking for eight people, my food doesn't taste the same. The chemistry of cooking slightly changes when the size and depth of the pans change, especially when baking desserts. The slightest diversion from the recipe can mean the difference between a fallen cake and a treat to be savored. When cooking for more people, experienced cooks consider an all-important question: “Can we translate from a small experiment to significant business without messing up the recipe?” (Liedtka & Ogilvie, 2011, p. 18). Leaders of high-growth startups encounter a similar dilemma. This question is on display in entrepreneurial restaurants. If the hottest new restaurant in town can grow while keeping the recipe intact, the owners position themselves for success. Most are not so lucky.

Food quality functions as an early indicator of change. Along with atmospheric factors and service quality, the quality of the food significantly determines the level of customer satisfaction (Erkmen & Hancer, 2019, p. 1481). Few restaurants bounce back after the food quality reaches a point of no return. Restaurateurs of every stripe face this problem. Quality issues are common in relatively new restaurants that attempt to scale following a successful launch. Established restaurants also undergo culinary leadership changes that can alter the recipes without a reliable system in place. With so many food delivery options through Doordash, GrubHub, and Uber Eats, restaurants cannot afford to let quality issues go unchecked.

A restaurant’s inability to preserve the quality of the recipe is a telltale sign of trouble. A haphazard change in recipes is often a telltale sign of staff turnover. New chefs can introduce different versions of a recipe and cause popular signature dishes to become unrecognizable. If other factors, such as the dine-in experience, start to slip, customers will take to Google or Yelp to express their dissatisfaction.

The problem of customer satisfaction through food quality preservation is more complex than it seems. Multiple factors determine a restaurant’s fate when owners attempt to scale. Increased expenses, supply chain management issues, and brand dilution can lead to failure. Fortunately, small actions can lead to successful outcomes. Restaurants should test their concept with a few small-scale events and collect feedback to iterate on their dishes (Hurley, n.d.). To minimize customer complaints, Hurley (n.d.) advised chefs to create food in the way customers consume it— “as a cultural and emotional experience.” It can be challenging for restaurants to maintain consistent quality standards. The litmus test is scaling without messing up the customer experience.

Strategy Making as a Learning Process

Ackerman & Eden (2011) and Hughes et al. (2014)Starting the shared vision journey with experiments allows for an initial vision to be tested through communication exchanges. This perspective relates to vision emergence, as discussed in Zone 4 of Chap. 3. Chapter 4 discussed the prominent role of thinking during vision conception when an organization learns to see. Vision conception is indeed a learning process that continues during the adoption phase through strategy making.

Vision +7-S Workshop

It's important to explore the gaps between vision and other parts of the organization. By measuring the gap, you begin to see the creative tension between where an organization is right now and where it wants to be in the future. I use the 7-S model to assess the gap between vision and reality. Of course, leaders can use this tool on their own, but then the organization would not learn to see—the leader would learn to see and then teach the organization what they saw. That has its place. However, for larger and more complex situations that have devoted time and energy to the learning process of strategy creation, the synergy that emerges from the group's insights is priceless.

McKinsey 7-S Framework Overview

Vision conception methods like strategic foresight bring vision out of the sky and into the realities of the business environment. Another way to test the vision on a strategic level is to perform a gap analysis. I have led workshops to help teams detect and explore *creative tension* by pitting a minimum viable vision (Vision 1.0) against McKinsey's 7-S model. In the late 1970s, two consultants, Tom Peters and Robert Waterman, created the 7-S model while working at the McKinsey and Company consulting firm. This organizational effectiveness framework centers around a basic premise of aligning seven internal aspects of an organization to increase its success. Where vision emerges, change is sure to follow. The 7-S model encourages analysts to ensure harmony among all parts of the organization. Using this model, internal and external experts can determine how well the organization has positioned itself to achieve its intended objective. In this case, that objective is to pursue and realize its future vision. The model has evolved along with best practices and new developments related to how experts perceive organizations as being connected to their future. The most notable change was the term "superordinate goals" being replaced by "shared values." This small change reflects a recurring theme of this book: the integration of follower perspectives into leadership studies.

Workshop Overview Using Viridian Case

After preliminaries, I start by grounding the workshop in four twenty-first-century visionary leadership principles. These principles reflect the symbiotic relationship between leaders and followers. First, stakeholders can accept or reject the vision. Second, after accepting a vision, followers must integrate it into their behaviors and decisions. Integration requires leaders to use reward systems to embed a vision at the level of an organization's culture. Third, a vision emerges from the culture more often than when teams create vision statements in a workshop. Fourth, grounding the vision in external and internal realities makes it more granular. The fourth principle is a sticking point and launch pad for the workshop.

The workshop places each 7-S dynamic inside of the futures wheel. Then, the facilitator explores one aspect of the model, starting with a description of the component. Next, the facilitator shares how the element is showing up at Viridian and in relationship to the founder's vision (Vision 1.0). Finally, participants get to weigh in. The facilitator helps participants perform a gap analysis between Vision 1.0 and the 7-S component in question. They think through first-, second-, and third-order changes that could emerge in response to Viridian's Vision 1.0.

7-S is a mental model that helps stakeholders to listen for gaps between vision and reality. The framework naturally leads strategic thinkers to seek a resolution between the preferred future and present realities. It brings vision into the present to do something about it right now. I use the Viridian case to teach this tool. Participants quickly relate to the narrative and build rapport using the contemporary issues from the case. Listening for gaps begins to unveil the creative tension and opportunities for vision to emerge. By the end of the workshop, participants can apply the skills and insights in their own companies.

Build Shared Understanding with Strategic Thinking

Strategy is closely associated with warfare and besting the competition. However, strategy-making requires more than simply translating a vision into winning tactics. Hughes et al. (2014) proposed strategy development as a learning process brought alive by strategic thinking competencies such as framing and sensemaking. Sanders (1998) considered strategic thinking:

> the obvious precursor to any strategy development or planning session. It begins with an exploration of the environment, an intuitive, visual, creative process that results in a synthesis of emerging themes, issues, patterns, connections, and opportunities. It has two major components: insight about the present and foresight about the future. (p.162)

Strategic thinking lies within the scope of strategic leadership, but it is distinct from strategic planning (Davies & Davies, 2010). Foresight expert Andy Hines (2006) explained that the acting phase of strategic foresight institutionalizes strategic thinking within organizations. To make the most of strategic thinking and foresight experiences, organizations should possess a collective openness and curiosity about the connection between its past, present, and future.

Approaching strategy-making as a learning process leads to shared understanding, which in turn opens the door to vision acceptance. As mentioned above, sensemaking, or making common sense, is a type of learning that takes place during strategy making. According to Hughes et al. (2014):

> Strategic leadership requires making common sense amid complex and ambiguous conditions. The dynamic challenges facing organizations today contribute to a common experience where stakeholders need more clarity about direction and alignment to counteract an overwhelming sense of disorganization and confusion. Strategic leadership involves making common sense amid just such chaotic conditions. It involves giving some coherence to what could otherwise feel like confusing and contradictory communications and signals at work. Like reframing, making common sense is particularly useful during the earlier stages of strategy as a learning process. (p.85)

Building shared understanding among groups can become increasingly difficult in the presence of barriers and obstacles. Making common sense becomes tricky when "separated across boundaries of rank or power, functions or expertise, organizational affiliation and commitment, demographics or geography" (Hughes et al., 2014, pp. 85–86). In this case, a cultural island strategy would help to distribute the power temporarily within a safe environment.

Counternarrative: Allow Vision to Emerge from the Culture

Far too many visionary leaders directly or indirectly impose a vision on their organization. Herein lies the problem. A company's culture will launch an attack on new threats to the status quo. A new vision fits that description unless allowed to emerge from the culture. If a leader's main challenge is getting people to "buy-in," the organization or team needs to rewind to an earlier stage of the Vision360 process to increase commitment through stakeholder involvement. Followers adopt visions they helped to create.

Gravitation Toward a Collective Approach

One way to avoid overusing top-down leadership is to use a collective approach, which is, by nature, multidirectional. And here's a secret—it's happening anyway! To take this approach, the visionary leader has to question their assumptions, including their need for autonomy and total control over every aspect of the business. Control gets replaced with agency, which a Vision360 leader uses to orchestrate the work and empower their team members to perform it. Twenty-first-century vision leaders take advantage of the force of nature, otherwise known as the collective approach.

The trademark of organizational visioning lies in its collective or social nature. In considering what makes leadership effective, Van Knippenberg and Stam (2014) proposed the importance of visionary leadership "concerns the definition of ends for a collective (i.e., the vision to pursue) and the attempt to persuade followers to contribute to the achievement of these ends as a collective interest" (p. 243). Naturally, the visionary leader functions as a social architect who constructs shared meaning and interprets current reality, motivating followers toward coordinated action (Bennis & Nanus, 2007). Communication creates this sense of understanding, and "shared perceptions of the vision are developed through leader-follower communication processes" (Kohles et al., 2012, p. 478). Visionary leadership has a collective focus, but it falls short of creating a truly shared visioning experience despite the complex nature of visioning and change requiring a joint approach.

Organizations accelerate their progress exponentially when teams come together to see, think, and learn. That is the nature of synergy. In Chap. 1, leaders were advised to rewind to involve more stakeholders in vision development and iteration. Gravity Payments' story from Chap. 1 illustrated the benefits of leaders engaging their organizations in collective group discovery processes. Compared to how Gravity Payments responded to the 2020 recession, Viridian could have achieved better results in critical areas such as knowledge management and employee retention. Due to an abundance of *polarities* and *redundancies*, leaders cannot fix systemic complexity with the same logic applied to fix problems (Anderson & Adams, 2016). That logic falls short of producing sustainable solutions and, in the worst cases, can make situations more complex.

Non-obvious solutions to current problems and polarities are too complex for one person to provide all the answers. Solving so-called "wicked problems" requires collective intelligence and group wisdom. Anderson and Adams (2016) highlighted a pressing market need for facilitators to master the skills necessary to help leaders and client organizations address complexity more effectively. Facilitators build mastery by increasing proficiency in whole group discovery, vision creation, strategy making (Ackerman & Eden, 2011; Block, 2011; Hughes et al., 2014; Wilkinson, 2004), business transformation (Heim, 2018), and balancing dialogic and diagnostic organization development methods (Bushe & Marshak, 2016). A foot-in-the-door strategy for facilitators is to share with organizational decision-makers the benefits of employing a stakeholder approach for vision and strategy development. Professional facilitators structure sessions to match the complexity in the stakeholder groups with the complexity found in the environment, ask questions that draw out answers from participants, and provide containers to capture their perceptions. Their process ensures the group achieves the desired, and often a few unexpected, learning outcomes. To take the collective approach, a visionary leader has to update their personal operating system by adopting slightly different beliefs about leadership and being open to trying new ways of shepherding their teams to the point of vision acceptance.

Disclaimer: Increased Diversity Equals Increased Complexity

Achieving buy-in and consensus on future direction is critical to vision adoption. The evolution of strategic planning lends insights into how organizations respond to increased complexity in the external environment. The complexity does not disappear, but the energy is transferred upon entering the organization, which must deal with it accordingly. The way a whole group session is managed determines whether complexity is handled in productive or nonproductive ways. Because of the evolution in strategy and planning, leaders are "involving more people in the process, delegating to those closest to the customers and using cross-functional teams" (Mason, 2007, p. 15). On the one hand, organizational visioning and strategy development are likely more effective from a collective approach as, in many cases, dissenting perspectives from stakeholders offer untapped insights needed for effective decision-making. On the other hand, increasing the number of stakeholders involved heightens the level of complexity associated with the process (Ackerman & Eden, 2011). Internal and external facilitators help teams to navigate this paradox of vision adoption so that the value of shared visioning outweighs the costs associated with complexity.

Translation: Infusing the Vision with Shared Meaning

When entering an organization, leadership dynamics grow more complex than they do in theory. Things get complicated when considering where each group is on the Vision Journey. Things get even more complex when considering where the leader needs them to be for the organization to move in the desired direction. The visionary leader understands each department, team, and project has its own Vision360 map, as does the whole organization.

Given such complexities, leaders must find a way to bring stakeholders and organizational components together. Leaders can use vision to infuse a company with meaning. In describing the five principles of holographic design, Morgan (2006) provided a perfect way to think about vision in the context of translation and communication. He advised building the whole into the parts. Let us import that principle into visionary leadership through the lens of vision communication.

In the translation zone, leaders should use their agency to encode the vision into the parts of the organization. People will begin to speak a dialect of the same language—vision language. This process starts at the beginning of adoption as vision is reflected in the strategy, operations, and every other part of the organization. Picture the organization as both a pyramid and a network. In the pyramid, information moves vertically, up and down the chain of command. In a network, information moves through the linkages in more of a horizontal fashion. Organizational actors create meaning as information flows back and forth between them via communication channels.

Accretion of Meaning

The science of visionary leadership revolves around vision communication. The communication of a vision implies it has been at least conceived and created in the mind of the visionary (Van Knippenberg & Stam, 2014). The visionary's challenge is sparking free-flowing, accurate knowledge exchanges about the organization's big idea—even if it is tentative. The spontaneous exchanges between system components will facilitate the making of shared meaning, which is the desired outcome of vision emergence, translation, and crystallization of Zones four, five, and six.

Multidirectional communication approaches reflect the dynamics of twenty-first-century organizations that are constantly in motion. This section will outline the outside-in, bottom-up, inside-out, top-down, one-to-many, and few-to-many directional approaches.

In the earlier sections, the goal is to direct information from the lower tiers to the upper tiers of the pyramid in a bottom-up approach and from the fringes of the network to its hubs in an outside-in approach (Fig. 5.7). The opposite is true in the

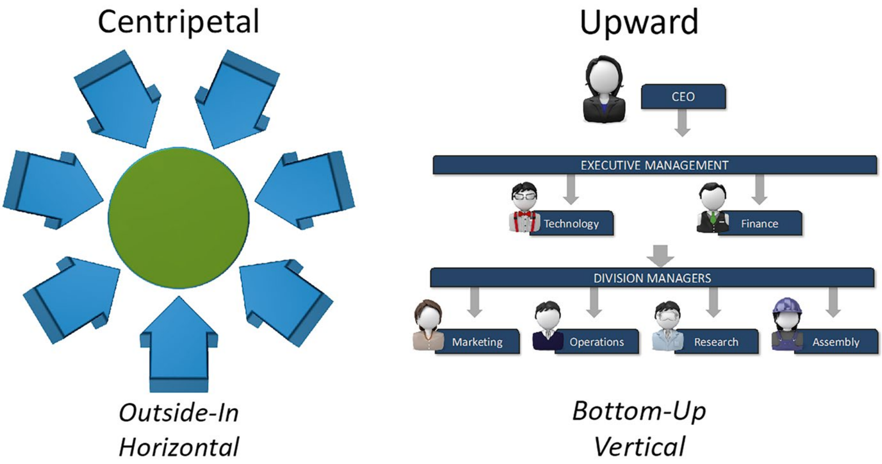


Fig. 5.7 Accretion of meaning

latter sections, where the objective is to move information and knowledge in the direction of the decision-makers and influencers.

Upward Communication

Prior to the COVID-19 pandemic, I ran a half-day communication and feedback workshop for an education company. The 20-person team had initiated a change initiative to transform their communication culture. Institutionalizing a process for effective two-way feedback between managers and employees had failed repeatedly. The Millennial and Gen Z team members were uncomfortable providing upward feedback to their managers. The leadership culture espoused a value of managing upwardly, but over three-fourths of the staff members were unable to do that. Managers needed to have ground-level information from customer- and student-facing employees. The lack of shared knowledge had started to impact the organization's performance negatively, and top managers were unable to make accurate decisions in a timely manner.

Failure of upward communication *Bottom-up* or upward communication exchanges are ripe for vision emergence. When upward communication fails to reach top and middle-tier managers, however, it becomes more challenging to improve organizational performance (Schein, 2017, p. 118). Senior leaders often feel at least two degrees of separation from the front-line and end-users due to layers of bureaucracy, being shielded from the ground truth, or negligence (Baldoni, 2003). Younger employees can be reluctant, and sometimes unwilling, to provide upward feedback. Their hesitance tracks back to a looming threat of retaliation from managers who have the power to reward or punish them (Hackman & Johnson, 2013). This threat can be real or imagined, but giving upward feedback can cause uncertainty and anxiety, especially for employees who lack psychological safety within the company culture.

Gen Z and Millennial employees who tap into their sources of influence end up flipping this power dynamic in their favor. Sure, Boomer, Gen X, and early Millennial bosses have position power. On the contrary, late Millennial and Gen Z employees can use the expertise they have gained on social media and other online platforms as a power base. They can use such power to depersonalize and professionalize their upward communication experience. One Gen X manager shared anecdotes of their younger employees who use feedback sessions as an unbridled opportunity to "tell it like it is." This approach is counterproductive. In such cases, entry-level team members should support upward feedback of a negative nature with facts gathered from inside knowledge of the organization, personal work experience, or physical proof (e.g., sharing stories of unhappy customers) (Hackman & Johnson, 2013, p. 175). Giving upward feedback should not be used as an employee's "moment in the sun" but as a chance to add value to their organization and their careers.

Social media provides sources of information for individual contributors to share with their leaders. Such knowledge gathering is a common practice in software development and software-as-a-service, better known as SaaS). Developers use feedback solicited and collected on social media to improve their programs (Bajic & Lyons, 2011). Despite its challenges, social media can bestow attributes of leadership to influencers with no formal authority in their job roles (Moorley & Chinn, 2016, p. 517). For instance, communication managers who engaged in blogging activities were rated higher in communication expertise and knowledge by their followers (Jiang et al., 2017). In a study on social media use in nursing leadership, Moorley and Chinn (2016) found that formal leaders adopted a top-down approach using hierarchical power. Informal leaders derived power through their ability to connect with others, build consensus on shared purpose, use emotional connection for sensemaking, and engage followers in grassroots creativity and co-creation through a relationship-based approach. These examples show that managers have position power, but many entry-level employees have sources of influence derived from social media.

Centripetal Communication

Social media interactions begin moving in an upward direction when a person in the organization chart redirects its destination. Until that point, the direction of social media interactions would appear more horizontal than vertical. They move between the fringes and hubs of the organization's network. *Outside-in* communication starts on the fringes of the organization and moves toward the center of the network. It empowers the foresight process that begins with happenings in the business environment and that could impact the organization. Leaders who have adopted a stakeholder approach consider more perspectives than just those of their employees and managers. They also gather the perspectives of their customers, distributors, vendors, and community members.

Case Example: Empathy in the Automotive Industry

The competitive landscape of automotive sales is anticipated to shift radically over the next ten years. Deloitte (2020) reported emerging trends within the automotive industry will likely continue to disrupt traditional automotive sales channels. This disruption is expected to cause automobile manufacturers to "sell directly through digital user touchpoints that are becoming increasingly relevant" (Deloitte, 2020, p. 34). Tesla popularized this trend, which traditional and online-only car dealerships have adopted. Dealerships have improved the sales experience; however, a select few have mastered the end-to-end user experience needed to win the competition with online platforms. Businesses in many industries are using empathy to understand the end user's journey during the early stages of design.

Empathy generates tangible results when appropriately used by designers. University of Virginia professor and best-selling author Jeanne Liedtka shared the story of Cynthia—a young, single mother who ordered customized M&Ms. as a special surprise for her five-year-old son's birthday party (DardenMBA, 2012). She made significant financial sacrifices to make sure her son's birthday was special. Here is the problem. The shipping company delivered his custom party items two days late. A company manager saw this as a learning opportunity and used Cynthia's story to build empathy between his employees and the customers they serve. It is easier for teams to empathize with a person or persona than with a nameless face (Liedtka & Ogilvie, 2011). Hence, use cases have become more common.

Empathizing with customers requires a heightened sense of awareness and management of one's own emotions. Goleman et al. (2004) proposed that "empathy builds on self-management, but that means expressing emotions as appropriate, not stifling them" (p.50). The plaid-jacket car salesmen of 20 years ago were more prone to manipulating customers' emotions than being in touch with their own. In this case, a lack of emotional intelligence (EQ) would be a barrier to empathy.

Customer Visits and User Feedback Loops

Design thinking has changed the way companies produce new products and revamp old ones. Let's be honest. What entrepreneur wants to build a product that no one wants to buy? To prevent ideas and products from ending up in the Adoption Pit, organizations preempt such customer resistance using empathy. To be in the moment with a customer or client takes pre-work to capture the correct information. Accepting customer responses at face value without asking probing questions prevents the design team from understanding the task a customer seeks to complete (McQuarrie, 2008). Interviewers should ask probing questions to draw out as much information as possible. The customer who gives one- and two-word answers will prompt a skilled interviewer to probe for deeper insights. McQuarrie's (2008) discussion guide helps design teams to think through customer perceptions of current offerings, desired enhancements, back-end issues, and the purchasing decision process. The interview format and assignment of roles (i.e., moderator, listener, and observer) also make the process more effective. A prepared and organized interviewer will likely experience more creative discoveries. They will hear what the customer is not saying. This is the key to making great products: anticipating the client's needs and providing the best solution before they know what it should be.

The Role of Social Media in Centripetal Communication

Virtual customer visits gained popularity as a cost-effective alternative to in-person visits. Since the late 1990s, Microsoft and IBM have used online discussion forums and virtual product design centers to involve customers in product development and support (Nambisan & Baron, 2009). During the height of the pandemic, event planners harnessed online technology to explore venues and source events for later in the year (Social Tables, n.d.). Real estate agents also gave virtual tours to international buyers in response to physical distancing rules and travel bans. These tours helped overseas prospects to cut down on the costs and time commitments associated with travel.

Social media-based communities provide outlets for customer feedback while influencing customers' intentions to repurchase products (Ho & Wang, 2015). Organizations with thriving online communities assign a team member to moderating comments and addressing customer complaints. A point person must own the task and the process.

Social Media and Authentic Leadership Communication

Leadership is a form of influence. According to Avolio et al.'s (2000) theory of E-leadership, organizational leaders can influence the "attitudes, feelings, thinking, behavior and/or performance" of individuals or groups of stakeholders using a social influence process.

Despite the limitations, organizations are using social media to strengthen brand image and overall perceptions of goodwill. For instance, social media allows CEOs to share messages and information directly with the public, unlike in traditional media channels. Men and Tsai (2016) proposed social media as a "critical tool for leadership communication, listening, branding, and engagement" that can bring stakeholders in closer proximity to the CEO (p.939). A well-thought-out social media presence increases the likelihood that customers will perceive a chief executive as caring, approachable, and friendly (Men & Tsai, 2016). CEOs who induced deeper engagement with and active participation from the public were "perceived as more authentic and approachable" and consequently helped to enhance the relationship between their organization and the public by engendering trust and satisfaction (Men & Tsai, p. 939). The influences of social media and group processes accelerate the acceptance or rejection of ideas. This phenomenon is most commonly known as "going viral."

Leaders can interface with the general public and their virtual teams using social media and online platforms. Much like face-to-face communication, social media interaction facilitates authentic communication with real-time interactions of a conversational and personal nature (Men & Tsai, 2016). CEOs who build a strong media presence solicit feedback and listen to the needs of the public while openly communicating in authentic and intimate ways (Men & Tsai). Social media enables leaders to build community and trusting relationships, accomplish complex tasks, and gain real-time information that can be used to understand the organization's environment (Jiang et al., 2017). Leaders of small and medium businesses use social media to manage their reputations, minimize the spread of misinformation, and communicate a shared vision to reestablish trust during times of crisis (Hackman & Johnson, 2013; Jiang et al.; Ott & Theunissen, 2015). Social media and online platforms empower leaders to manage their businesses in ways unimaginable just two decades ago.

In a world of Facebook, Snapchat, and TikTok feeds, remember that replacing a face-to-face conversation is next to impossible. The richer the communication channel, the more information is conveyed during interactions. Face-to-face interactions carry the richest amount of information, including words, voice tone, facial expressions, and body language. In virtual settings, some of the richness of facial and body language is lost. Phone calls lose the visuals of body language altogether. Messages can be misconstrued through email and text as the receiver can misinterpret the sender's tone of voice. Email and text are also asynchronous, and a delay in response can carry meaning for the receiver that the sender may not have encoded. When seeking pure, unadulterated, authentic experiences, a face-to-face in-person experience is a leader's best bet when the situation allows.

Diffusion of Meaning

Vision creation and communication do not automate successful vision adoption. Communication happens throughout the day-to-day operation of any organization, and two-way communication reflects the symbiotic relationship between leaders and followers. When organizational leaders regard vision as an innovation (Kohles et al., 2013), their perspective triggers a different purpose for communication: to diffuse a vision throughout the organization. Rogers (2003) defined diffusion as a process by which "an innovation is communicated through certain channels over time among the members of a social system" (p.5, emphasis added). This definition contains four relevant components for Vision360: (1) vision functions as an innovation, (2) vision must be communicated, (3) the communication takes place through specific channels over time, not one time, and (4) members of a social system givers and receivers of vision-related messages. This entire book addresses the first component of Rogers' definition. Chapters 8 and 9 will address the organization's social system. This section will deal with components two and three of Roger's definition of diffusion.

The most common direction for diffusing meaning through an organization is *top-down*. A top-down approach reflects hierarchy and stems from a need to control an organization for performance and effectiveness. Such control perpetuates the organization's existence and avoids crises. Ironically, visionary leaders tend to mandate vision in crises as well. So, top-down communication is often necessary but not always the best approach to take. Organizations have more direct control when dealing with internal stakeholders—employees, team leaders, and managers—than external stakeholders such as independent contractors, customers, investors, community members, and government agencies. A leader's ability to exercise top-down control is tested, especially when dealing with external stakeholders. Leaders generally prioritize influence, and managers prioritize control. Diffusing meaning is more an exercise of influence than control.

Inside-out communication starts within the leader and extends to their inner circle, organizational unit, enterprise, and finally, the business environment. Leaders begin with their inner work and inner game (Anderson & Adams, 2016). The inside-out approach is where leader agency begins. At the enterprise level, inside-out leadership starts at the heart of the organization with its shared identity and strategic direction. It sees itself as creating win-win situations for its stakeholders and the company. By leading in this way, leaders reinforce enduring values that support the direction, transform the culture, and avoid releasing negative antibodies to counteract a perceived threat to the status quo. By learning how these dynamics work together, organizations institutionalize shared meaning into company culture.

Granularity, Big Data, and Shared Vision

Have you ever heard someone say, "Jenny has an eagle's eye for detail?" The funny thing about eagles is that they can see small details from incredibly long distances. Imagine being able to spot a rabbit from two miles away. Not everyone has an eagle's eye for vision. Data helps to color a visionary organization's language to paint a more granular picture for those who have trouble grasping the big picture. Some stakeholders are not top-down thinkers—they think from the bottom up. Data brings the vision into their line of sight.

Knowledge Formation

Think back to Sosa's accretion theory of ideation presented in Chap. 4. The same principle applies to the formation of knowledge. In an era of big data capabilities, it helps to think of knowledge forming in multiple stages. According to Mische (2018), *raw data* is collected in stage one but it lacks structure and form. Quants verify, refine, and form the first-order data into consistent data. In stage two, data scientists assemble *formed data*, placing it into a logical structure. At this stage, the data appears formal, structured, complete, and defined. Data is converted into *information* in the third stage as analysts infuse it with meaning, form, and definition. Analysts begin to make sense of the data. They place it into a context and give it a purpose to explain relationships of causality, correlation, or random occurrence. In stage four, data and information are transformed into *knowledge* through synthesis, consolidation, and conditioning. The question of how to use this newly created knowledge is revisited. In the fifth stage, knowledge combines with biases, beliefs, hopes, dreams, and personal life experiences to produce *wisdom*. At this final stage, whoever will present the data pulls on their context and perspective. They draw from a wealth of experience to consider what has worked versus what has failed. They also unpack why and how things failed in a quest to transform knowledge into wisdom through a process of continual learning, application, and relearning.

Data Analysis, Presentation, and Storytelling Skills

Data adds granularity to stories, especially when the presenter has reached the wisdom stage of knowledge. Oliver Wendell Holmes referred to this point as "simplicity on the far side of complexity." To tell a compelling story, a presenter has to translate data into terms that anyone can understand. Visionary and data analytics leaders figure out how to present the data in a user-friendly way. Smith (2018) likened the crafting of a numbers-driven narrative to that of a traditional story. Universal storytelling techniques—structure, resolution, conflict, emotions, and surprises—apply in both cases. Emotional intelligence, starting with awareness of one's feelings and extending outward to consider likely audience reactions, makes narrative creation easier. Because pure statistical reasoning fails to generate meaning, Denning (2007) advised data leaders to revisit why they are analyzing the numbers, to begin with, recommend actions based on the statistical analyses, and consider other non-quantitative factors that should influence the decision.

Shared Language and Meaning

The processes leading to creating a collective vision infuse organizations with a shared language and common understanding, in turn producing a unifying and inspirational effect. Organizational members must develop a common language, and their ability to share knowledge depends on the "commonality of vocabulary, conceptual knowledge, and experience between individual specialists" (Grant, 1996, p. 380). When combined with a shared language, a shared social identification can translate into positive outcomes, especially with cross-national acquisitions (Reiche et al., 2015). The common language should grow at the intersection of the organization's past, present, and future to avoid alienating key stakeholders and having the vision regarded as too aspirational.

Developing shared understanding can be challenging "among groups separated across boundaries of rank or power, functions or expertise, organizational affiliation and commitment, demographics or geography" (Hughes et al., 2014, p. 85). However, shared visioning helps CEOs of larger firms increase communication across hierarchical boundaries like occupational cultures due to a common corporate language. In a study of 574 Japanese middle managers within functional departments of different foreign subsidiaries, shared visioning was found to mediate the relationship between corporate language proficiency and reverse knowledge transfer from local subsidiaries to the global headquarters (Peltokorpi & Yamao, 2017). Shared vision promotes more effective knowledge and information sharing by providing a mutual frame of reference (Grant, 1996; Peltokorpi & Yamao). A shared vision also increases the likelihood for organizational members to share and exchange resources (Tsai & Ghoshal, 1998). One could argue that company culture and the status quo become so ingrained mainly due to the robust process of creating a shared dynamic.

Vision is diffused throughout the organization using translation, communication, and emergence. If conducted successfully, diffusion results in employees and managers adopting the vision. The diffusion subphase of the Vision360 process contains the communication tenet of visionary leadership. Diffusion starts in the adoption phase and continues throughout the organizational transformation, development, change, and integration phases.

By nature, vision is a new idea associated with change and growth. When vision is introduced in an organizational context, leaders are advised to increase their visibility and communication to facilitate team members' adjustment to new situations. Open, ongoing two-way communication can help prevent conditions that evolve into unbridled conflict and unforeseen crises in organizations. Vision communication should be revelatory or insightful to deter organizational members from casting off self-restraint (Proverbs 29:18a) and encourage them to pursue something that supersedes their self-interest. A vision co-created by one person or a change initiative solely by a small group of top leaders can be perceived to non-verbally convey a message rooted in the self-interest of executive leadership. When the vision means something, leaders rarely have to tell followers the "what" and the "how"; instead, they surround themselves with the answers—with the vision. Such an environment allows them to draw their own conclusions and make their own decisions. Their choices are fed back into the system to improve the vision iteration process.

Vision Assimilation

When leaders repeatedly communicate and cast the vision to stakeholders within a social system, a shared language develops, encoded with a commonly held meaning. Both the shared language and meaning parlay over to vision adoption and eventually reflect the degree to which stakeholders accept or reject the vision. The technical term for wide-scale acceptance is vision assimilation, which is defined as "the degree to which a vision is owned and shared by organization members" (O'Connell et al., 2011, p. 104). Shared visioning culminates with vision assimilation, where the vision is accepted as shared, evidenced by its adoption.[2]

A study conducted by Dvir et al. (2004) found CEOs pursue vision acceptance among their employees in four ways. Using *procedural ownership*, CEOs develop employee ownership of the vision through training and workshops. Using *hierarchical partnerships*, senior managers maintain ownership of vision

[2] The term "assimilation" could be problematic given potentially negative cross-cultural associations. "Degree of sharedness" and "acceptance" are alternative terms.

development while engaging others in the process. In the *execution* model, workers carry out a vision owned by a few top managers. In the *sharedness* approach, assimilation is generated through the multidirectional interactions of a group process (Dvir et al.; O'Connell et al.). Technically speaking, the level of vision assimilation reflects the effectiveness of the shared visioning process.

Researchers have measured shared vision in numerous ways, including the extent to which others shared their vision, the degree of similarity between leaders' and members' vision attributes, and the extent to which stakeholders are satisfied with the organizational vision (O'Connell et al., 2011). Although strategies should reflect an organization's vision, measuring strategy alone does not work. There must be a high-level measure of effectiveness or validity that ensures that organizational leaders are not simply measuring strategy in a vacuum for strategy's sake.[3]

Leaders should assess the degree of uptake and sense of ownership of the vision. Several leading indicators increase the chances individuals and groups of stakeholders will accept a vision. One indicator, perception of net gain, includes defining a vision and **persuading** followers it is the best course of action. Four conditions are necessary for followers to perceive the type of net gain that leads to vision adoption. Kohles et al. (2013) proposed:

> To the extent that followers 1) perceive that the vision has **a relative advantage over existing ideas**, 2) **high compatibility** with the organization's **existing values**, 3) it is easy to **try without incurring a high risk of recrimination**, and 4) is readily **observable and understandable**, the more likely they will perceive it **as applicable to their jobs** and the greater the commitment to the organization. (pp. 479, emphasis added)

If organizational leaders are yet to begin persuading followers of net gain by this point in the vision iteration cycle, it is time to rewind using the insights from this chapter.

Vision acceptance depends on stakeholders' perception, and not an illusion, of net gain. According to Cady and Milz (2016), the desire (D) and vision (V) for change, the first steps toward change (F), and supporting mechanisms to enable change (S) must be greater than the resistance to change (R). The equation reads $D + V + F + S > R$. In the vision iteration cycle, leaders work to increase the factors on the first side of the equation. Doing so converts change resistance into change readiness.

Much attention is devoted to strategy alignment, but leaders should also spend time increasing vision attunement (Goleman et al., 2004). When followers are attuned to a vision, they have an emotional connection. This attachment starts in the reflection phase. The section on vision reflection talked about how the vision should reflect the perspectives of departments and teams to connect to their realities. By

[3] Research on the validity of Balanced Scorecard (BSC) and other progress monitoring software would help in the feasibility analysis for the planning prism. (See earlier section on "Vision Translation.") The product/process may be marketed and sold as "vision integration" tracking software or executive dashboard with benefits comparable to those of other software packages. Another differentiator would be the use of vision, strategic leadership, and strategic foresight language.

casting vision, leaders create lines of sight where followers can see themselves in the organization's future. Sight lines incorporate multiple points of view—all of which reflect the vision. An individual component to vision reflection also exists. People want to see their personal and professional lives reflected and accounted for in the collective vision. They want to see themselves in the organization's future. Remote work options, promotion pathways, meaningful work, and corporate social responsibility are ways that organizations strike the right chord with their workforce. Each of these represents followers' needs for self-actualization. When a vision touches those needs, it stands a chance of being accepted.

Adoption is not an afterthought. Getting a vision accepted by a critical mass of people requires much engagement, planning, and forethought. Assimilation involves assessing the degree to which the vision is shared and, therefore, owned by organizational members. The next step is to examine the extent to which employees integrate or embed the vision into their work behaviors and decisions—starting with the senior leader. There is one other thing between the vision and status quo—the intertwined systems and operations better known as the organization.

Summary

Vision translation and crystallization are necessary precursors to strategy-making. However, when a Founder-CEO or senior manager "shares" the vision by telling or selling it, that action unleashes organizational antibodies to defend the status quo. A stellar idea can quickly fall into the Adoption Pit when leaders fail to consider vision adoption adequately. These six truths shed light on the arduous and often elusive path to widespread acceptance.

- On ground level, vision acceptance cannot be mandated. Followers have the option of accepting or rejecting the vision.
- Creating a truly shared vision requires organizations to rewind or start earlier in the vision development process.
- Making sure the vision reflects diverse stakeholder perspectives helps leaders to increase buy-in and avoid the need to mandate acceptance.
- Vision translation works alongside the emergence process, where strategic leadership teams translate a crystallized vision into strategy.
- A crystallized vision reflects and represents the multitude of perspectives within an organization. A crystallized plan is one that stakeholders can see the vision through.

  A shared language and meaning develops when leaders repeatedly communicate the vision to stakeholders within a social system. Both dynamics parlay over to vision adoption and reflect the degree to which stakeholders accept or reject the vision.
- Through translation, communication, and emergence, vision is diffused throughout the organization. If successful, employees and managers adopt the vision.

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Emerging Organizations and Entrepreneurial Teams

6

Organizations in the Rideshare, AI, FinTech, AdTech, and CivTech verticals are emerging in diverse ways in the twenty-first century by carving out market spaces, forging entire industries, and creating entirely new categories. Founders are venturing out differently than in the twentieth century through incubators, venture studios, accelerators, and corporate ventures. Gig work has also popularized the one-person business and an increasing number of workers own their jobs. One cannot forget the types and classifications—small and medium businesses, middle market companies, and corporate enterprises. Last but certainly not least, startups can grow to become unicorns and gazelles and camels (oh my!). This chapter starts by mapping the startup landscape.

Mapping the Startup Landscape

The startup landscape is nestled within the complexities of the business environment and alongside established firms. The Organisation for Economic Co-operation and Development, or OECD, defines an enterprise as "a legal entity possessing the right to conduct business on its own, for example, to enter into contracts, own property, incur liabilities, and establish bank accounts" (OECD, 2021). Their definition includes corporations, quasi-corporations, non-profit institutions, and unincorporated businesses. Organizations are classified using various methods. Government agencies and business ranking lists often classify enterprises according to their size, with the most common criteria being the number of people employed. According to OECD (2021), small and medium-sized enterprises (SMEs) employ less than 250 people. SMEs are subdivided into microenterprises (with fewer than ten employees), small enterprises (with 10–49 employees), and medium-sized enterprises (with 50–249 employees). Large enterprises employ 250 or more people. Other classification factors include age, revenue, and life stage.

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Startups

Startups are commonly classified according to their business models, industries served, vertical markets of their product, investment stage, and valuation. Business models include business-to-business (B2B), business-to-consumer (B2C), business-to-business-to-consumer (B2B2C), business-to-government (B2G), and consumer-to-business (C2B). Customer-to-customer (C2C) and peer-to-peer (P2P) e-commerce transactions power the marketplace platform model. With their unique business model in mind, startups whittle down the list of industries served. Each industry fits within a sector of the economy, and each sector ladders up to one of eleven supersectors. The supersectors are divided into two classes: goods-producing industries and service-producing industries.

A startup's product fits within a vertical market that mirrors the US Bureau of Labor Statistics' (BLS) list of industries. Each vertical becomes further subdivided and broken down into niches. One accelerator I worked with listed 60 vertical markets for founders to choose from when applying. Finally, the investment stages include incubation, pre-seed, and seed stages, followed by Series A through E funding rounds. At times, founders may add a bridge round in between stages. Startups are classified based on valuation if they have reached unicorn status.

Unicorn Startups

Classifying unicorn startups based on their market valuation is an emerging trend within the business landscape. However, what exactly is a unicorn startup? Aileen Lee, an investor, and founder of Cowboy Ventures, coined the term "unicorn" to describe 39 US-based software companies founded within the previous ten-year period and "valued at over $1 billion by public and private market investors" (Lee, 2013). Startups that qualified were deemed members of what Lee's team called the "Unicorn Club."

A unicorn startup has achieved a valuation of over $1 billion.

The Internet has allowed businesses to scale at unprecedented rates that approach infinitum. New designations for valuation have emerged, including a "decacorn," which is worth over $10 billion, and "hectocorns," which are valued at over $100 billion. Former unicorns and Fortune 500 companies are increasingly investing in potential unicorns. The number of unicorns has increased by over 3000%, growing from 39 in 2013 to 1230 in 2024. Both trends will likely continue as the investment into and acquisition of unicorns helps larger tech companies mitigate the risk of disruption.

Unicorns transform during a period of high growth and intense pressure. If you have made it this far through this chapter, you are probably familiar with the phrase "zero to launch." The launch analogy is embedded in startup culture along with its associated lexicon. Founding teams frequently use the term "runway," which subconsciously evokes images of a straight line. Because vision is iterative, new venture launches incorporate loops of iteration and curvilinear journeys. High-growth companies take an accelerated journey through multiple loops. Imagine an upward spiral. The first loop is "zero to launch," followed by the second loop of expansion, the third loop called scaling, and the fourth loop is the exit. Related funding stages coincide with each loop. Despite an overuse of rocket images and runway analogies, startups travel in loops on the road to legitimacy. Unicorns launch on the runway while iterating like crazy.

Firms targeting small and medium businesses are using data from CBInsights and Crunchbase to analyze the speed of unicorn growth. For example, Zenbusiness classified the speed of unicorns by industry, birth year, and demographics such as country of origin and founder's gender. Fleximize categorized unicorns by the time it took to reach a $1B valuation. Their study found that only four companies have achieved the designation in under a year and twenty within two years of incorporation (Fleximize, n.d.). These startups are reaching the billion-dollar mark at increasingly fast rates. More unicorns exist than there were 10 years ago, and they are moving at a much quicker pace.

High-Growth Firms

Only a handful of companies have become unicorns, but the publication of Inc Magazine's annual Inc5000 list suggests that businesses are growing faster each year. High-growth firms (HGFs) and gazelles, which have different classifications from unicorns, typically pursue these designations. Inc5000 companies represent a specific type of high-growth firm that qualifies based on verifiable revenue data, location, and ownership factors (Li et al., 2016). Before exploring the definitions for HGFs and gazelles, let us make this easy to remember. Unicorns and HGFs are types of startups. A gazelle is a type of high-growth firm.

What is a high-growth firm? The Organisation for Economic Co-operation and Development (OECD) defines high-growth firms (HGFs) as having ten or more employees and an "average annualized growth greater than 20% per year over a 3-year period, as measured by employment levels or [company] turnover" (Clayton et al., 2013). Using the simplest type of indicator of high growth, the OECD defines high-growth firms according to a primary and secondary qualification. First, HGFs satisfy a predetermined threshold distinguishing their growth rate. Second, the HGF must be above a specific size "to mitigate any small enterprise growth bias" (European Communities/OECD, 2008, p. 61). Gazelles are "the subset of high-growth enterprises which are up to five years old….with average annualized growth greater than 20% per annum, over a three year period" (European Communities/OECD, p. 63).

Why are HGFs important? High growth business tend to manufacture jobs more quickly than established companies. Clayton et al. (2013) confirmed that economists and policymakers regard young and small businesses as a vital source of job growth because firms with fewer than 500 employees "account for about two-thirds of net jobs created." This is important because "employment growth is a key indicator of labor market performance" (Clayton et al., 2013). When considering firms that will likely generate new jobs, policymakers think of entrepreneurs who seek to find an untapped niche and grow their business exponentially (Clayton et al.). Small firms can be young or old, but the more established firms are not notable generators of jobs.

Fortune 500 Companies

Fortune 500 companies have different qualifications to meet. Inclusion is limited to the largest 500 public and private US companies, and the list is ranked based on revenue (Rogelberg, 2024). To qualify for consideration, a company must "be for-profit, publicly traded or privately held, and be a US-based entity with financial statements filed with a US government agency" (Semczuk, 2024). When the conversation shifts to discussing Fortune 500 companies like Uber and PayPal, it is essential to keep these criteria in mind. Seven companies from the 2023 Fortune 500 companies —Alphabet, Meta Platforms, Tesla, Uber, Netflix, Paypal, and Airbnb— are *former* unicorns. (The first three companies listed made Fortune 50, and Alphabet made Fortune 10.) *Current* unicorns include ByteDance, Open AI, SpaceX, Canva, Miro, Grammarly, and Notion. Such companies are the equivalents of household names within startup communities. Unicorns are to the startup world what Fortune500s are in corporate America and a handful of former unicorns have made the Fortune 500 list.

Startup Trend 1: Corporate (and University) Ventures

Corporate venturing is an alternative to transforming an entire business—a way to reduce risk, enter new industries or market spaces, and minimize the effects of VUCA. Innovation and organizational transformation consultant Matthew Heim served as a beta reader for this book project. A comment made in his review of the manuscript described the role of corporate venturing so eloquently that it bears repeating. Heim explained:

> Today, many startups are created by consumer insights collected by large corporations. These large companies then spin off an R&D project into a startup, [and] then incubate it until the "product" is ready to be spun back into the company. This spin-out/spin-in model has accelerated over the past 12 years and is a common practice....The other model is where a corporation searches for a capability within the startup community [and] then funds the development with exclusivity rights to the product or technology. This is how Crunchbase, Owler, and CB Insights came about. (Heim, 2022)

Startup Trend 2: More New Businesses, Younger Firms

The emergence of visionary leadership theory coincided with a downturn in corporate longevity. In the late 1970s, the average tenure of S&P 500 companies was 30–35 years and decreased to around 20 years by 1990 (Gittleson, 2012; Viguerie et al., 2021). Figure 6.1 illustrates the trend starting in the 1920s and ending in 2012. This decrease in corporate life expectancy points to the likelihood that organizational scientists contextualized visionary leadership for existing firms.

The resurgence of visionary leadership coincides with an uptick in new business applications (Fig. 6.1). New business applications in the United States soared in the months following the onset of the COVID-19 pandemic and subsequent lockdowns. The U.S. Census Bureau reported over 545,000 applications received in July 2020 compared to 280,000 in July 2019 (United States Census Bureau, n.d.). The trend has continued following the pandemic, with an average of 450,000 applications in 2021, 423,000 in 2022, and 457,000 in 2023. The presence of more entrepreneurial businesses means more face time with visionary leaders and founders. Teams are testing vision in more founder-led companies than at any time in history.

Independent Startups and Corporate Ventures

Uncertainty in the business environment frightens those who like to play it safe. However, the need for change awakens a risk-taker's entrepreneurial spirit and causes them to start something new. Ventures take myriad forms, but they boil down to two fundamental categories. For the sake of convenience, the first category is labeled Type A, and the second category is Type B. The Type A classification includes the independent venture and Type B, the entrepreneurial team within an

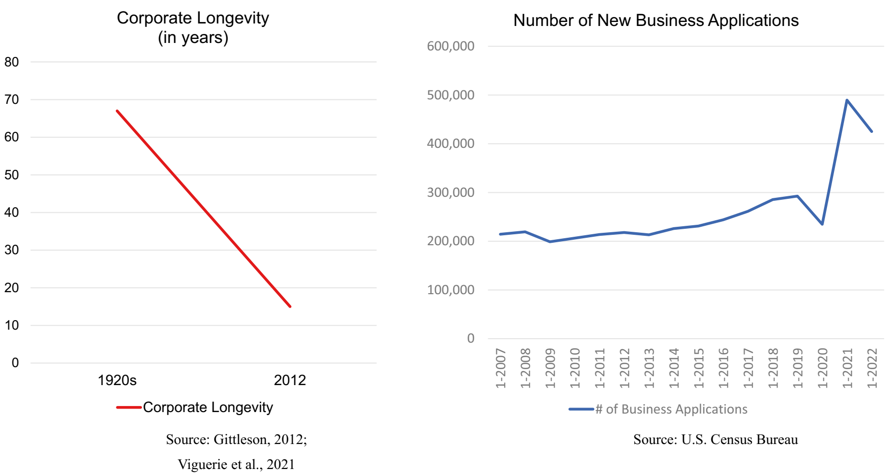

Fig. 6.1 Startup Trend 2

existing organization. Type A organizations are independent ventures that emerge directly from the business environment when a founder or group of founders start a new organization. Type B organizations emerge when the innovation efforts of existing companies push an entrepreneurial team to start a new business to explore marketplace possibilities while mitigating the risk of associating with a volatile new venture. 3M's recent healthcare spinoff, Solventum, fits this description. Generally, corporations and universities spin out Type B organizations to capitalize on marketplace opportunities unrelated to their core business. Both types are classified as new ventures, but they take different paths before the public will perceive them as legitimate businesses.

The Road to Organizational Emergence

Founder-CEOs are the epitome of visionary leaders. Unicorn startups and high-growth firms are the epitome of emerging organizations—each attained the much-coveted legitimacy associated with new ventures. Startups enter a process of organizational emergence when a leader casts a vision or overarching goal. The emergence process can last much longer than anticipated, but today's investors are less patient than 3M's co-founders. Twenty-first-century investors do not wait 14 years for a financial return. Thus, the emergence process often begins long before founders assemble to turn the idea into an organization. Founding teams engage in organizational emergence activities to reach a point of legitimacy.

Defining Organizational Emergence and Legitimacy

Emergence and legitimacy represent two of the most important legs of the startup journey. Organizational emergence is the process of transforming a new venture into a viable and operational business, often marked by a transition point such as positive cash flow (Perry et al., 2011). Such an inflection point indicates a successful initial experiment and provides a launchpad for future development (Perry et al.). At this stage, a venture becomes legitimate in the eyes of relevant stakeholders. New venture legitimacy is "a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions" (Suchman, 1995, p. 574). Legitimacy is the touchstone of organizational emergence. New ventures endure the process of emergence to attain the desired outcome of legitimacy.

Legitimacy and Resource Attainment

Insights from open systems and complexity theories magnify the evolution of new venture legitimacy and organizational emergence over the last 50 years. Tornikoski and Newbert (2007) suggested two types of legitimacy—strategic and confirming legitimacy—will propel a business to emerge from the business environment, while others fight for their lives. *Strategic legitimacy* involves the actions undertaken by a fledging business and *confirming legitimacy* concerns the firm's characteristics (Tornikoski & Newbert, 2007). Drawing from entrepreneurship literature, Tornikoski and Newbert (2007) proposed that if nascent organizations could convince the gate-keepers of resources of their operational and production capabilities, relevant stake-holders would perceive them as legitimate. The authors referenced four dimensions of organizations outlined by Gartner (1985) that may confer legitimacy onto new organizations and ultimately attract external resources. The *individual* entrepreneur should exhibit trustworthiness, and other factors such as their skills, abilities, personal characteristics, education, work history, and industry-specific experience correlate to positive chances of survival (Tornikoski & Newbert, 2007). Individual-level attributes are insufficient to legitimize a business. Due to the presence of multiple stakeholders in many firms, *organizational*-level characteristics such as credentials, industry competence, educational experience, and professional history of the founding/management team combine to create organizational capital, which weighs heavily on external perceptions of legitimacy. Organizational emergence activities lead to public perceptions of legitimacy, which in turn lead to resource attainment.

Twentieth-Century Organizational Emergence

What is the gap between twentieth- and twenty-first-century startups? When it comes to emergence, a twentieth-century venture went through a slightly different process than a twenty-first-century startup to earn a stamp of approval. The entrepreneurship literature discussed four cornerstones of organizational emergence: "the demonstration of a specific (entrepreneurial) intention, establishing boundaries, acquiring resources, and engagement in exchanges (Katz & Gartner, 1988)" (Baum et al., 2020, p. 41). The organizational emergence process converges with the pursuit of traction as new ventures develop their idea, create a business plan, acquire funding, and recruit team members (Baum et al.). The *business environment* and market conditions influenced the process founding teams took to officially emerge as viable organizations (Tornikoski & Newbert, 2007). As these external conditions began to change, founders and startups faced more uncertainty and complexity.

VUCA proved to be a game-changer in the entrepreneurial space, and the road to new venture legitimacy began to evolve into what it is today. How do companies move so fast? They lean into the VUCA world. When a leader introduces a vision into an existing business, its pursuit implies "movement toward a goal, an idealized state, or a vision of what should be, and movement away from present conditions, beliefs, or attitudes" (Rothwell et al., 2016, p. 16). It also initiates a process of organization development, transformation, and change. In this case, the culture deploys organizational antibodies to take down any disruption to the status quo unless it deems the associated changes as nonthreatening. But what happens when leaders present a vision within a relatively new venture? When an idea is introduced as a new vision, the leaders are still moving toward a preferred future and away from present conditions. The process happens differently. So, what does it take to legitimize a nascent venture in the eyes of prospective twenty-first-century stakeholders?

The Need to Recontextualize Visionary Leadership

The visionary leadership approach emerged at a time in the United States' history when the manufacturing era was coming to an end. Firms were repositioning to compete in an increasingly globalized strategic landscape. We are not talking about new businesses. The locus for visionary and transformational leadership was within existing companies. Even now, a search for "transformational leadership + entrepreneurship" does not yield many (if any) articles on startups. Instead, search results produce more articles on corporate entrepreneurship. Visionary leadership is a core component of transformational leadership theory. Judging by the volume of academic literature on the topic, the visionary approach to leadership was intended to revitalize established businesses. A handful of recent studies have examined how entrepreneurs mobilize the transformational leadership style, along with its associated skills, behaviors, and impact on the organization. However, a lack of scholarship exists where visionary leadership intersects entrepreneurship, startups, high-growth firms (HGFs), and small-to-medium enterprises (SMEs). The deficit of scholarship at this intersection is problematic, especially considering twenty-first-century workforce trends such as the gig economy, remote work, and a focus on collective and individual health. Visionary leadership developed in a twentieth-century context, but it is being refitted and retooled to meet the demands of the twenty-first century—the needs of startup organizations, chief among them.

Twenty-First-Century Organizational Emergence

The best-told story of organizational emergence in the twentieth century is from 3M. The problem is that 3M took over 10 years to become a legitimate business. The backstories of twentieth-century companies reveal noticeable similarities and differences with what startups do today. Twenty-first-century visionary leaders have paired related skills, such as design thinking, to achieve more distance in less time. Current and former unicorns like Uber, Zappos, and Airbnb increased their velocity through experimentation. The most significant difference is acceleration. Companies like 3M and Blackberry could have used an accelerator, having taken more than a decade to achieve legitimacy.

The degree to which organizational emergence has changed over the last 120 years is staggering. For instance, 3M went from zero to $1,000,000 in 14 years. (That sum was worth over $27,000,000 in 2023.) In comparison, SurveyMonkey was founded in 1999 and achieved a billion-dollar valuation 12 years later. Some baby unicorns are racing to a $1 Billion valuation in a fraction of that time. Jet.com wins the award for the fastest unicorn emergence on record having reached a $1 Billion valuation four months after the company was officially founded (Fleximize, n.d.). Twenty-first-century unicorn startups are becoming billion-dollar companies in a fraction of the time it took for organizations to emerge a century ago. These companies are traveling further and faster. Today's startups have learned to make mistakes faster, more intentionally, and as part of a growth system. Today's unicorn startups stand on the shoulders of visionary leaders and innovation forerunners of a previous era.

Let the Vision Search Begin

For years, leaders have treated startups like existing businesses. Recently, however, principles of entrepreneurial management (Blank, 2013) propose an altogether different assumption. Startups provide an internal reflection of an external VUCA environment. The task of the founding team is to harness these conditions by leveraging experiments to combat the notably high level of ambiguity in the startup world (Bennett & Lemoine, 2014). These emergent organizations survive by leaning into VUCA conditions. In a study surveying 137 software executives, Latham (2009) found that larger companies responded to recessionary conditions with cost-cutting measures, but startups adapted to market conditions using revenue-generating strategies such as market segmentation tactics. When completed successfully, viable companies emerge out of chaotic and complex situations.

MYTH: A startup is just a smaller version of a large company.

New ventures operating in a VUCA context rarely succeed under the same assumptions as established businesses (Blank, 2013). Exhibit 1.1 highlights the main differences between traditional organizations and startups. According to Blank and Dorf (2020), a startup is "*not a smaller version of a large company*. A startup is a temporary organization in search of a scalable, repeatable, profitable business model" (p. xvii). Blank and Dorf (2020) further explained:

> On the day the company starts, there is very limited customer input. All the startup has is a vision of what the problem, product, and solution seem to be. Unfortunately, it's either a vision or a hallucination. The company doesn't know who its initial customers are or what features they'll want. (p. 60)

The new ventures' vision search has begun.

On the road to becoming a legitimate business, leaders establish cultures and set up paths of least resistance that help the burgeoning business to survive and ultimately thrive. As organizations age and scale, they begin to do more things in less time. Managers equip the organization to think and act more efficiently. The corporate venturing subsection describes the spin-out/spin-in process that corporations have adopted to help internal ventures avoid the effects of bureaucracy and efficiency thinking that can terminate a promising venture prematurely. A vision search in an established organization takes on a different form than an independent startup.

Pivotal Moments Can Spark Product Visions

What if a would-be entrepreneur does not have a product, market, or customer segment to start? What if they have an idea, transforming experience, or aha moment? At this point, they may begin searching for a vision without a clear intention. Therefore, a vision search may start with customers, a product idea, an existing business, a mission, purpose, goals, strategy, a hunch, an opportunity, or an idea. The visionary searches for a preferred future based on one of these elements.

New Venture Legitimacy in the Twenty-First Century

By studying the emergence journeys and unique backstories of unicorns, we learn how startups became legitimate businesses. Each billion-dollar business began as a Type A or B startup, as described earlier. Before attracting significant investment capital or achieving such a valuation, each unicorn startup went through the organizational emergence process to become a legitimate business.

Increase Investment Readiness

Legitimacy is a critical outcome for new ventures. The journey to get there is anything but a straight path. A startup can engage in an array of activities in pursuit of emergence, and the founder can feel like their position has not changed at all. A quick scan of LinkedIn profiles shows that some founders start a business due to a layoff or the need for self-fulfillment. They spend a few years in the startup world only to reenter corporate America with a wide array of new skills, a broader perspective of business, and a higher price point for their salaries. These types of stories of personal development have become more common in the past 10 years. Founders start a business to pursue a career vision, and during the iteration process, the vision ages out, and the founder returns to corporate life.

Nine Categories of Legitimacy

Although the statistics may vary, one thing is for sure—the failure rate for new businesses is high. The most consistent statistic is that nine out of ten businesses fail in the long run. That means nine ventures call it quits as one sings a chorus of MC Hammer's 1991 hit "Too Legit to Quit." (I strongly and suddenly feel the need to digress.) Regardless of their fate, founding teams encounter many challenges when transforming a new venture into a sustainable business. Accelerators and incubators help early-stage ventures to overcome common hurdles. Solving the challenges has one goal: funding. All roads lead to investors. It is essential to take Dr. Steven R. Covey's advice and "begin with the end in mind."

In a joint article entitled "Considering a Startup Investment? Look at these 13 Signs of Legitimacy," 13 Forbes Finance Council members listed multiple indicators investors use to assess new venture legitimacy (Forbes Finance Council, 2022). The author regrouped the items and sprinkled in insights gained from venture scouting, founder interviews, and investor conversations. If you are a current or future founder, quickly assess your venture in each of the nine areas of investment readiness. Ask yourself, "how can I work with my team to strengthen our position in this area?"

Note: Investment readiness is an extension, and possibly even a function, of founder readiness. If a founder increases their readiness, the organization will follow suit. Therefore, the content of this section and the next is sandwiched in between the characteristics and readiness of the founder.

Founders

An investor's perception of new venture legitimacy revolves around their interactions with the founder. Cynthia Hemingway of Fourlane, Inc. explained that early investors are essentially investing in the vision of the founder and the leadership team (Forbes Finance Council, 2022). As a result, she looks for high emotional intelligence, drive, and the founder's motivation to mold or shape the vision through various stages of development. This idea alludes to the principle of testing or experimenting with the founder's vision as a starting point for shared visioning. The founder needs to express the willingness to let team members test their big idea. If the founder is unwilling, they will not perceive the net gain afforded by allowing team members to test the vision with fresh ideas. Chances are high that team members' insights will bring about the need to iterate on the vision. And sometimes, a pivot will be in order. The evidence gathered through experimentation will lead founders to know if and when a pivot is necessary (see Table 6.2 which lists ten types of pivots). The founder's track record speaks volumes to an investor. Even if they have not previously founded a company, investors want to know that founders have grit, humility, and intelligence—the internal qualities to press through tough times.

Team

For an investor to perceive a founding team's potential, the founder must first perceive and maximize the potential of their leadership team. They should also be prepared to overcome challenges like connecting with mentors, recruiting co-founders and executives, and hiring staff members for specific functional areas. The management team should not only have the required skills to perform the tasks but also the internal mettle forged through high-stakes leadership. Things will change on a dime, and the leadership team needs to facilitate the change to ensure that the work continues. A significant mistake founders make is hiring people just like them.

Instead, the chief executive should select team members who complement and supplement their skill set and who they enjoy working with. Investors, individual contributors, and leaders should have a background and experience that puts the startup further ahead on the road to legitimacy.

Intangibles

At the beginning of my master's journey, I worked with a staffing firm in central Maryland to learn about employee motivation and engagement. I interviewed the leadership team and a few of the new employees in the back office. When I asked the CEO about what motivated people to come to work, she responded with "their paycheck." When asked the same question, most of the back-office staff responded with "the open, relaxed culture." The employees had grown tired of the stuffiness of corporate America. Any funded company can pay its workforce—an underfunded startup trades in intangibles, at least partially. The startup provides a unique culture, vision, and sense of mission. The early joiners supply energy, passion, and a willingness to go above and beyond the call of duty.

Product

Designers engage in visual thinking and rapid prototyping to produce a minimum viable product (MVP). Technology expert Ken Morris provided a seven-step roadmap for startups to develop their MVPs. He advised startups to validate the idea, define the product, design, prototype, develop the product, launch and gather feedback, iterate, enhance, and scale (Morris, 2024). The process of iterating products and platforms in partnership with potential allows the organization to learn together. Potential users provide their perspectives on the essential components to include in the design, along with proverbial "bells and whistles." Use cases begin to emerge along with an ideal customer profile. The exchanges between users and designers reflect the emergence dynamic that undergirds the Vision360 model. By engaging the MVP process, startup teams develop the customers and market while building a shared understanding of the product vision.

Market

With an MVP created, the startup faces market-related challenges. Founding teams research the market size using the TAM-SAM-SOM model. TAM is an abbreviation for Total Addressable Market; SAM stands for Serviceable Available Market; and SOM is an acronym for Serviceable Obtainable Market. I have met with many early-stage founders who are excited about their TAM. Mara Garcia of Phonexa Holdings, LLC, warned founders of the danger of overestimating their market size. On the flip side, she advised startups to avoid niches and products that will not allow the business to scale even if they could outpace their competition (Forbes Finance Council, 2022). Investors like to fund startups that have strategically positioned themselves in large and growing markets.

Customers

New ventures spring up on the cutting edge of VUCA conditions. Regardless of their initial situation, startups begin with a search. Steve Blank's juxtaposition of customer development with design thinking highlights this point. While lecturing Columbia University's Business School students, Blank proposed that customer development begins with a product idea, followed by a search for customers (Columbia Entrepreneurship, 2015). Design thinking in established businesses, on the other hand, begins with a customer or customer segment and then searches for a product. In this search, an independent startup makes "good-enough" decisions in a quest to achieve product-market fit (PMF). The time to reach PMF varies. GitHub achieved it in less than one year, while it took about four-and-a-half years for Slack and Miro to feel confident they had found their ideal customers (Rachitsky, 2023). Aaron Spool of Eventus Advisory Group recommended that investors speak with at least two of a startup's active customers who are paying the full price for the product (Forbes Finance Council, 2022). They will provide authentic feedback about the product and their plans for future use.

Traction

A startup builds traction as it moves through the vision iteration process. Venture capital investor Jonathan Crowder of Intelis Capital strongly recommends that founders seek Pitch-Investor Fit (PIF) in a continual quest for investment thesis alignment (Crowder, 2023). Pre-seed round investors confer legitimacy onto a new venture, which, if stewarded appropriately, leads to more legitimacy. Venture Capital investor Adam Ned considers both monetary and non-monetary sources of traction when evaluating early-stage startup applications to LvlUp Ventures. In addition to paying customers, indicators of early traction include a solid MVP, evidence of product-market fit, case studies, pilot, letters of intent (LOI), and a waitlist of customers. Investors fund MVPs, not just ideas. Existing partnerships with major companies and prominent people also show evidence of traction. As startups mature and build momentum, the need for growth strategies increases, especially in areas of advertising, marketing, business development, finance, and operations.

Operations

If culture and vision represent the intangibles, then physical operations represent the tangibles. I have introduced countless founders to a handful of investors from my professional network. If my description of the startup intrigues them, the first question investors ask the founder is, "can you send me your pitch deck?" A founder's pitch deck is a crucial component of their data room. When examining a startup's data room, Zain Yaqub, founder of ThinkFISH, looks for specific items related to pitching, marketing, financial projection, intellectual property holdings, market research, sales process and data, staffing, technology, and government compliance/legal documentation. The data room backs up the track record every venture claims to have. The information should be accurate, reliable, and logical. Nick Chandi or ForwardAI strongly recommends investors check for red flags in cash flow areas, including outstanding client payments, evidence of being overextended, and underspending in mission-critical areas (Forbes Finance Council, 2022). Resource management and lean startup practices are an ongoing challenge for new ventures.

Capital Investment
In the six months following the closure of Newchip Accelerator, I met with about 30 founders in the database. In a cold email, I stated my desire to discuss their fundraising strategy—which was one of the twelve challenges they selected during their onboarding process. Prior to drafting the email, it was essential to shore up a list of angel investors, venture capital firms, family offices, crowdsourcing, and corporate ventures in my network. One challenge very few founders selected was "co-founder conflicts over equity division." Peter Goldstein of Exchange Listing LLC advised founders to be aware of capital investments received to date and manage prior investments with potential future investors (Forbes Finance Council, 2022). He highlighted the investors, structure, and valuation as critical to the future success—liquidity and return on investment—of the enterprise. Financial services firm Fidelity Investments manages cap tables and data rooms pro-bono for startups that have raised less than $1 million and have less than 25 people in the cap table.

Trend: De-risking a Startup Using Corporate Venture Capital

Established businesses are lending their credibility, legitimacy, and investment dollars to de-risk startups. Corporate venture capital, or CVC, has emerged as a hybrid risk management strategy and fundraising method. A recent study conducted by Global Corporate Venturing found that corporate investors decrease a startup's risk of failure by about 50% (Palmer, 2023). The study also found that corporate-backed startups increase their exit multiple during an acquisition or IPO. Nineteen percent of startup funding rounds now include a corporate investor—the rewards of which include practical business support, access to testing labs, novel distribution channels, and introductions to potential customers (Palmer). As of March 2024, Google Ventures—the corporate investment arm of the parent company Alphabet—backs 32 out of 1230 current unicorns (CB Insights, 2024). Other corporate investors on the 2024 list included Nintendo, American Express Ventures, Bloomberg Beta, Coinbase Ventures, Slack Fund, Alibaba Group, PayPal Ventures, Salesforce Ventures, Comcast Ventures, Dell Technologies Capital, BMW iVentures, Lockheed Martin Ventures, and Visa Ventures. CVC is gaining traction with founders, and a few corporations are going on to acquire the startups they fund. When it comes to de-risking a venture, CVC is one popular method among many.

Founders Take Risks

Founders are risk-takers, but even their risk tolerance has limits because no founder wants to lose their dream. In many cases, a founder's business vision funds their dreams. To increase their level of readiness, it is crucial to help the founder overcome the resistance to allowing team members to test their initial vision. A founder who prepares to allow their people to test their big idea is a founder ready to start sharing their vision in a new way.

An early-stage founder's focus is on getting their vision airborne. The leadership team helps the founder chart the course. The technical team figures out how to build a rocket from the plans drawn by the engineering and design team. The investment team determines if the idea will scale to produce a substantial return.

Founders are risk-takers with little to no time for touch-feely vision stuff. Founders are also reluctant to give up on their vision even under the direst circumstances. They keep focused on the big picture using a 360-degree scope of vision. The visionary leader's job is to remain focused on the big picture of maintaining a well-funded and growing enterprise. So when it comes to vision, a startup founder's subconscious knee-jerk response usually sounds like this:

> I'm trying to launch a viable, profitable business with not much runway while trying to fundraise, go-to-market, develop an MVP. I don't have time for that touchy-feel vision stuff.

Blind spots can tank a fledging business, and external threats in the economy can leave founders without enough runway to survive. Recently, I heard about an internal conflict that alienated a group of SaaS co-founders, costing them valuable time, hard-won traction, and, ultimately, their business. The founder-CEO made a unilateral decision based on market trends but the co-founders silently disagreed while moving against the decision. The co-founders' official truth was "yes, sure, we agree." However, they harbored their disagreement until the startup became a house divided. Within a year, the company dissolved.

An organizational vision is often assembled during one-off experiences, culminating in a concise statement. Complexity theory questions this approach. Vision in a complex system emerges through everyday interactions, unplanned experiences, and amid change (Olson & Eoyang, 2001). This view stands in stark contrast to the perception that vision is "pie in the sky" and disconnected from organizational realities. When vision touches the ground, stakeholders may disagree with the direction and share dissenting views. Just as founders are tested in the shark tank daily, the process of organizational emergence tests the founder's vision.

Principle 7:
Entrepreneurial teams de-risk new ventures by testing the founder's vision.

Understanding Founders' Resistance to Testing Their Vision

One thousand two hundred and thirty is the number of current unicorns in 2024 as listed by CB Insights. This figure represents countless founders with visions of startup success. The founder will realize their product vision only if the budding organization mitigates the risk of failure. De-risking a startup is ultimately the founder's decision. You may ask, "what founder wouldn't want to decrease the risk of failure to increase the chances of success?" The obvious answer is that every founder wants this outcome. The non-obvious answer is more complicated. On the ground level, a founder's willingness to trade control for success hinders them more than their ability and desire to succeed. Here is the backstory.

A founder's role evolves during the life cycle of a business. Their ability to relinquish appropriate control of the startup largely impacts valuation, especially after the first 3 years (Wasserman, 2017). Why is giving up adequate control difficult for founders, even if it makes logical sense? A startup originates in the mind of a founder with their picture of what personal success looks like, and then for the business, as an extension of themselves. Their vision closely relates to their core values like freedom, fulfillment, control, autonomy, financial success, high status, and upward mobility. The list goes on and on. Founders also have a vision for life after their exit if they plan to divest from the business. These outcomes include keeping control of the company, selling the business (or part of it) for the highest price possible, and steering the company in the right direction by advising or passing the business on to future generations. Tech startup founders may also dream of an IPO, merger, acquisition, and the much-ballyhooed billion-dollar exit.

Antibody: Resistance from the Founder

A business vision is highly personal to a founder. For many founders, starting a business is their dream. They have been dreaming about launching out for years. So, their dream is very close to their heart. It is not necessarily a vision yet but a personal dream. And even when they put together a product or service and achieve a measure of success, the business is still experienced as a dream at first. Followers and even co-founders need to know this from the start: When it comes to allowing someone to test their business vision, the dream and the business vision are intertwined. Their reasons for launching into business will vary. However, each founder has something their business is supposed to accomplish for them on a personal level. If it is their first rodeo, they may have a hard time letting go and allowing followers to test their vision. It all depends on their perception of net gain. By letting followers experiment with the vision, will the founder be better or worse off?

Chapter 1 explained that founders' syndrome is a common condition where business operations revolve around the founder's personality. Founderitis, as it is often called, is considered "a management weakness and leadership disorder [with the potential to affect] every entrepreneur envisioning and planning a long-term journey for his/her established business" (Boustani & Boustani, 2017, p. 519). Founders' syndrome is the path organizations default to when founders do not let their people experiment with their vision—when they view their perspective on the future as the sole outcome of the business and not one of many possible futures. When founder's syndrome sets into an organization, the team is not at liberty to perform even the slightest deviation from what the founder has prescribed. This constraint hinders the team's creativity—stopping creative ideas before they start to percolate. It is the aggregation and accumulation of such ideas and knowledge that lead to the accretion of vision—a phenomenon that is essential to building a shared vision.

Founders' Autonomy: A Driver of Entrepreneurial Behavior

It is critical to grasp how autonomy drives entrepreneurial behavior to understand leadership in startups and fast-growing companies. Most founder-CEOs conceptualize their businesses while working a full-time job and in response to personal reasons, professional frustrations, or a desire to serve customers differently.

Case Example: Conflicting Growth Visions for Early-Stage Starbucks

In *Pour Your Heart into It*, former CEO Howard Schultz recounts the story of Starbucks' founding. In 1971, Jerry Baldwin, Zev Siegl, and Gordon Bowker co-founded Starbucks Coffee Company. Jerry, who served as the company's president, had a vision for expanding the company. He was also on "a mission to educate consumers about the joys of world-class coffee, roasted and brewed the way it should be" (Schultz & Yang, 1997, p. 27). Despite Baldwin's vision, neither he nor his business partners sought to build a business empire. They co-founded Starbucks because of their passion for coffee and tea and their desire to give Seattle access to the best of these products. In a series of conversations, Jerry shared his vision for Starbucks with Howard Schultz, including a desire to expand beyond Seattle, starting with Portland, Oregon. Howard also shared his vision for expansion with Jerry, Gordon, and their silent partner, Steve Donovan. Howard envisioned Starbucks expanding to dozens or even hundreds of stores and its name becoming "synonymous with great coffee—a brand that guaranteed world-class quality" (Schultz & Yang, p. 41).

Jerry, Zev, and Gordon appeared to agree with Howard and shared his excitement until they talked it over with the other partners. They were concerned about disruptive change following a new direction, along with a potential culture clash and lack of fit with Howard's energy and leadership style (Schultz & Yang, 1997). The founders of Starbucks Coffee Company ended up declining Howard's offer, and he responded by starting Il Giornale. In an ironic twist of fate, the co-founders of the original Starbucks decided to invest in his venture. They shared Howard's vision, but they did not want to change their business to match Schultz's entrepreneurial dream. A few years later, the co-founders wanted to sell, Howard acquired and transformed the company, and the rest is history.

The boundary for the co-founder's needs for significance in this situation extended no further than their passion and business operations. Had Starbucks Coffee's co-owners followed Howard's vision and transformed the original company into a global brand, they would have inevitably ended up in a power struggle over the identity and direction of the company, and the story could have ended much differently. They were not blinded to the opportunity Howard presented and waited for a unique occasion to engage. Starbucks' case teaches a lesson on balancing a founder's initial vision with a vision for expansion without giving up control of the company.

Control: The Root of Autonomy

Control is rooted in a founder's need for autonomy. Autonomy motivates an entrepreneur to start and run a business and serves as a source of personal satisfaction (Van Gelderen et al., 2020). In the early years, the company centers on the founder-CEO's vision, but the entrepreneur's personality and vision prove insufficient for enduring success (Ng, 2020). Due to the emotional attachment to their businesses and underlying threats, it can be difficult for entrepreneurs to entertain notions of shared visioning without prompts from an outside influence.

Recall the decision-making bottleneck created at Viridian once the founder-CEO reclaimed control of all external stakeholder communications. The effects of reorganizing the reporting structures caused his middle managers to wait for him to make decisions that were formerly within their power and purview. Three general forms of power exist in organizations. *Power over* is represented by implicit or explicit dominance, *power from* which resembles "the ability to resist the power of others by effectively fending off their unwanted demands; and *power to* takes the form of empowerment or sharing power to give individuals more autonomy within specific realms of operations" (Hollander & Offermann, 1990, p. 179). A company's success hinges on a founder-CEO's willingness to see beyond controlling every facet of the business and detect the need to empower employees, not just for decision-making but for personal and collective growth.

Sometimes, founders need a carrot. They need motivation to overcome the resistance they feel and to relinquish control over some aspects of vision development and iteration. If not, they will fall into what go-to-market expert Robert Kaminski called "the vision trap." Early-stage startups fall into the vision trap when vision marketing leads to failure (Kaminski, 2024). Kaminski tells the story of a founder who temporarily locks themselves away to build v1.0 of a new product. They build traction with the new clunky product, first among their tech enthusiast peers, then through word of mouth, and finally by securing venture capital for their seed round. The funding allows the founder to share their vision and early traction with future thinking leaders at other tech companies who fall in love with the product. The founders are convinced their product is the next big thing. So, they invest more money into sales and marketing to reach the mass market. Then, they receive the shock of their lives when the mass market does not fall in love with the concept of the product. Convinced these new folks "just don't get it," the founders sink more money into marketing and sales to increase brand awareness. They attend industry conferences. They refresh their brand with a new logo and continue expanding. Unfortunately, revenue stagnates and thus begins the downward spiral (The vision trap is closely related to the Adoption Pit from Chap. 5).

Paradigm Shift: From "Me-First" to "People-First"

Kaminski warns founders to beware of the vision trap, saying, "you can't market the mass market the same way you market early adopters. Those who understand this and are willing to put their vision aside will win. Those who don't and would rather ride their vision into the sunset will fail" (Kaminski). The founder who refuses to question their assumption that their vision is the only way will risk losing their vision in the long term. The founder who authorizes team members to iterate on their vision stands a greater chance of success. It is a principle of life and servant leadership. The person who clings to their life will lose it; the one who sacrifices their life for the right reason will find it (Matthew 10:39). A founder's vision is a source of life. The highest reason to sacrifice one's life is so that another may find theirs. This level of sacrifice is one of the highest purposes of vision. One proverb takes this notion a step further by proposing that without the revelatory nature of a vision, people will cast caution to the wind, run wild, and run the risk of an early demise (Proverbs 29:18). At its core, vision is not for the visionary—it is for the people.

I had the pleasure of speaking with Jeremy Stein, who worked as a former manager at Madden Games. I talked with Jeremy when he was in the early stages of standing up a gaming venture. The conversation with Jeremy bridged the gap between the two sets of values a founder moves in between. These values can be summed up in two terms: me-first and people-first. Jeremy explained that his motivation for wanting to start his own venture was that he valued the autonomy to execute his people-first vision and values through proven leadership. This paradigm shift reflects a critical perspective many founders adopt on their Vision Journey. I have personally watched many founders make the shift from autonomy to customer-centricity to employee-centricity. They shift from a "me first" mentality to a "people first" mentality. This change in a leader's perspective happens gradually and then suddenly. Zone one of Chap. 3 discusses a founder's transition from customer-first to people-first. That change of mind was a force multiplier for his business.

Two Approaches to Test the Founder's Vision

When a new reality challenges or conflicts with the founder's big idea, it is possible to test the founder's vision. In startups, a founder typically starts with a product vision. This idea is full of the founder's assumptions about the market, product design, and ability to acquire resources. Not all of these assumptions have been stress-tested. In their advice to founders of lean startups, Blank and Dorf (2020) gave instructions on how to deconstruct the founder's vision and test its underlying assumptions. Many new ventures do this using an MVP to start.

The Minimum Viable Product (MVP)

Ambiguity—the fourth component of VUCA—rules the day in an early-stage venture. When founders, CEOs, and Top Management Teams lean into VUCA conditions, they can apply visionary solutions to reduce ambiguity. Michael Schrage's (2016) rapid innovation methodology promotes experiments to deal with countless unknowns a scrappy startup will face. Experimentation has proven beneficial in testing the founders' vision for startups (Blank & Dorf, 2020). The Lean Startup Movement (Blank, 2013; Ries, 2011) and the resulting methodology prove the idea of testing the founder's vision is more of an experimentation process than a euphemism. Experimentation improves a new venture's information-gathering and knowledge-sharing capabilities.

Testing the vision empowers startups to turn the tide on VUCA. Blank and Dorf (2020) described the journey an early-stage venture takes on the road to emergence. The entrepreneurship experts offered the following narrative:

> On the day the company starts, there is very limited customer input. All the startup has is a vision of what the problem, product, and solution seem to be. Unfortunately, it's either a vision or a hallucination. The company doesn't know who its initial customers are or what features they'll want. (Blank & Dorf, 2020, p. 60)

At this point, entrepreneurial teams start down one of three paths: the full-feature product pathway, the delay and deploy pathway, and the minimum viable product (MVP) pathway (Table 6.1). The MVP option is a more productive approach where the design team "develop[s] the core features of the product (incrementally and iteratively with agile engineering methods), with the feature list driven by the vision and experience of the company's founders" (Blank & Dorf, 2020, p. 61). The development of an MVP is iterative. Founders usually know when it is time for a full pivot.

Table 6.1 Three pathways for product development

	Full-feature product pathway	Delay and deploy pathway	Minimum viable product (MVP) pathway
Actions	Develop a full-featured first release of the product. Include all features on the founders' wish lists.	Delay product development and deploy the customer development team on a search for customers who can provide sufficient feedback	Generate immediate feedback from potential customers using a minimum viable product (MVP). This method tests whether the team understood the customer's problem well enough to identify and include key elements of the solution in the prototype
Risks	Time, cash, engineering, and design efforts are invested with minimal return because the product features do not match their wants and needs—they will not use them. The startup did not allow customers to share in developing the product vision	Delaying product development costs time. Without a product, founders depend on customers' imaginations for feedback	The MVP de-risks the product development process. However, the number of needed iterations and pivots can exceed a startup's runway

Source: Blank and Dorf (2020)

Art of the Pivot

The business world often borrows terms from the tech industry. One of those terms is "pivot." Ries (2011) defined a pivot as "a structured course correction designed to test a new fundamental hypothesis about the product, strategy, and engine of growth" (p. 149). Pivoting and agile have become buzzwords, but despite co-opting the term, business leaders do not always use it correctly. Eric Ries made this clear in *The Lean Startup*. Professionals often refer to pivoting when they mean "iterating" (Ries, 2011). The word "pivot" has become synonymous with responding to needed change, and it represents a specific type of change. McDonald and Gao (2019) proposed comparing strategic reorientations, or pivots, to the scientific method, where "ventures pinpoint a customer problem to solve, test hypotheses about potential product solutions…learn from market feedback…and determine whether and how to revise the product for a new target segment" (p. 1289).[1] Blank and Dorf (2020) defined a pivot as "a substantive change in one or more of the nine boxes of the business model canvas" and an iteration as "minor changes to the business model components" (p. 34). They referred to nine building blocks of Osterwalder and Pigneur's (2010) business model generation process: customer segments, value propositions, channels, customer relationships, revenue streams, key resources, key activities, key partnerships, and cost structure. A startup can pivot its business models while staying true to the enduring vision.

Pivotal Moments

For a new venture to pivot without meeting resistance, the founder(s) must experience a pivotal moment. For almost two decades, I have specialized in walking with visionaries during such times. Usually, these epiphanies center on starting a business or weighing the pros and cons of embarking on a daring dream for the future. Within the context of developmental coaching, Clancy and Binkert (2017) defined pivoting as "a key moment in coaching when clients come to a new realization," essentially equating pivotal moments with "aha moments" and "epiphanies" (p. 40). By experiencing pivotal moments, founders can create a mindset shift toward positive experiences, such as solutions and the outcomes they desire, and away from problems and undesirable effects. Coaches, mentors, and trusted advisors help them minimize resistance to shared visioning and increase their readiness.

Pivots as Strategic Change

Pivoting is certainly not a one-off event. Although it is uncertain whether a founder's pivotal moments lead to organization-wide pivots (i.e., course corrections),

[1] The term "iteration" is defined in more disciplines than business and startup world. Oxford's Dictionary of Physics defined iteration as "the process of successive approximations used as a technique for solving a mathematical problem. The technique can be used manually but is widely used by computers" ("Iteration," 2019a). Similarly, the Dictionary of Mechanical Engineering defined iteration as "the process of finding a solution to an equation, or set of equations, by successive approximations" ("Iteration," 2019b).

studies suggest a correlation may exist. When examining strategic decisions at risk for change in entrepreneurial energy and cleantech firms, Kirtley and O'Mahony (2020) found that "decision-makers chose to change their strategies only after new information conflicted with or expanded their beliefs" (p. 1). Moreover, their research discovered strategic reorientations did not follow a single decision, but the strategy elements were added or subtracted incrementally over time, accumulating into a pivot. Changing strategies following a solitary decision was a rare occurrence, not status quo. Kirtley and O'Mahony further advised:

> A pivot is the first major strategic change many startups face. Rather than make wholesale change with one decision, firms incrementally exit or add a single element to their strategies. A firm pivots and reorients their strategic direction by reallocating or restructuring the firm's activities, resources, and attention through an accumulated series of decisions to address the ongoing stream of problems and opportunities early-stage firms confront. (pp. 1–2)

This author believes that entire businesses can and do reach pivotal moments. These moments can happen when negative emotions are running high (Oh, the irony!). Moments of truth become miracles in their own right—especially when revenue is winding down and relationships are breaking down. Situations can seem pretty bad at times, but like a category-five hurricane, there is peace in the eye of the storm. That sense of peace is often found in the decision to pivot.

Case Example: Pivots at Early-Stage 3M

The founding of 3M illustrates how an early-stage company survived by leaning into the uncertainties of the mining and manufacturing industry to achieve organizational emergence in the early twentieth century. The story of 3M demonstrates the use of sandpaper as a minimum viable product (MVP), iterating both the product and the business model multiple times, all in pursuit of vision development and realization. 3M's story reveals many pivots and iterations on its twelve-year journey to become a legitimate business. The co-founders and investors pivoted and persevered when all evidence pointed to the contrary. The recounting of 3M's early days illuminates lean startup principles, even where it diverges from the methodology—anachronistically speaking, of course.

While 3M's case does not match each principle of the lean startup on the nose, it does check the box on a few of the ten types of pivots (Ries, 2011) used by new ventures (Table 6.2). A cursory examination of 3M's early story suggests the founders used a combination of pivots when transforming the venture from a supplier of raw materials to a grinding wheel manufacturer to a maker of sandpaper. If the founders had demonstrated an undying commitment to mining and supplying corundum, the company would likely have folded.

Founding a startup carries many unknowns, and risk is baked into a new venture. There are ways to minimize that risk to increase investment readiness, chances of short-term viability, and likelihood of long-term success. Founders can decrease risks for a nascent venture in many ways, including experimentation, lean startup and design thinking methodologies, accelerators, incubators, and corporate venture

Table 6.2 Ten types of pivots

Pivot name	Description
Zoom-in pivot	A single product feature becomes the entire product
Zoom-out pivot	An entire previous product becomes a single feature of a significantly larger product—a reverse of the zoom-in pivot
Customer segment pivot	The product addresses a customer problem but not for the initially intended customer. Such cases partially confirm the product hypothesis, just for a different customer group than anticipated
Customer need pivot	The startup becomes well-acquainted with customers, revealing two insights: (1) the solution for an initial problem is not very important to the customer and (2) building customer relationships reveals problems the customers want to be solved. Discovering new customer needs may require a new product or repositioning an existing product
Platform pivot	The offering changes from an application (i.e., a stand-alone app) to a platform
Business architecture pivot	A startup begins with one business architecture model and switches to the other. These include (1) the high margin/low volume (complex systems model) associated with business-to-business (B2B) or enterprise sales cycles and (2) low margin, high volume (volume operations model) associated with consumer products
Value capture pivot	This pivot changes the way a company captures value
Engine of growth pivot	To achieve faster or more profitable growth, a company changes to one of the three types of growth models: viral, sticky, and paid
Channel pivot	A company changes the sales or distribution channel after realizing "the same basic solution could be delivered through a different channel with greater effectiveness" (p. 176)
Technology pivot	More common in established businesses, this pivot involves "a sustaining innovation or incremental improvement designed to appeal to and retain an existing customer base" (p. 176)

Source: Ries (2011)

capital. Add some point, the vision for the established organization will expand beyond the product vision. The next chapter gives insights into how organizations navigate vision creation and emergence.

Summary

Existing businesses transform when vision is introduced, but startups emerge. Successfully stress testing the initial vision builds the velocity needed to get a new venture off the ground. New ventures experiment to create a shared vision. Here are six insights from this chapter:

- When vision is introduced, existing businesses transform, but start-ups emerge.
- Startups are the embodiment of emerging organizations, and founder-CEOs are the epitome of visionary leaders.
- The process of organizational emergence tests the founder's vision.

- Founders who green-light experimentation with their initial vision position their organizations to increase investment readiness and ultimately achieve legitimacy.
- 3M's story illustrates an in-depth example of organizational emergence over more than a decade.
- Fast-growing startups reach a point where the organization outgrows the founder's vision. Founders who evolve with their businesses are more likely to experience longevity.

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7 Vision Creation and Emergence

Many organizations engage in a visioning process, hoping to produce a vision statement shared by all stakeholders. In a new venture, the visionary often braves the vision creation process alone. In larger organizations like Tesla, top management teams will come up with a succinct vision statement and use it to chart their course. These are common practices for vision development.

Vision Statement of Tesla:

To create the most compelling car company of the twenty-first century by driving the world's transition to electric vehicles.[1]

Mission Statement of Tesla:

To accelerate the world's transition to sustainable energy.

In reality, the creation of a vision looks more like the right side of Fig. 7.1 than the left side. In Tesla's case, its mission statement reflects an obstacle encountered on the road to realization. In any case, the creation process is a gradual journey that builds up to a vision-creation or direction-setting session. The culminating experience represents both an end and a new beginning, but the vision emergence process never ends. The journey can leave founders of new ventures with conflicting thoughts like, "Why does it seem like the vision is changing? We don't even have a vision statement. Wait, why *don't* we have a vision statement yet?" Leaders of existing businesses can also be left pondering, "we have a vision statement but is it outdated? Should we change it?" Vision can change, but in established ventures, it changes less often than in startups.

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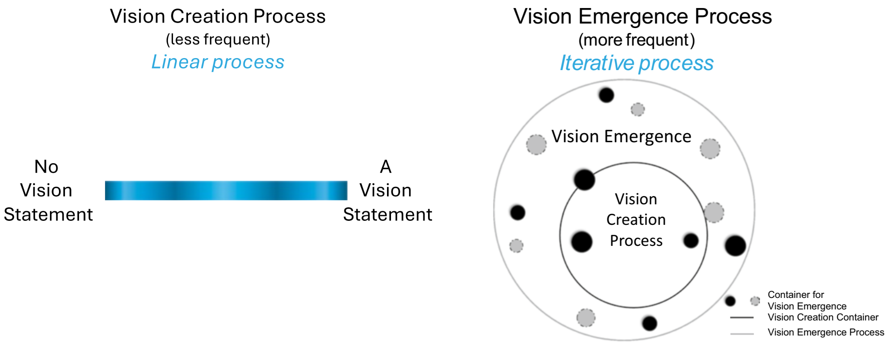

Fig. 7.1 Vision creation and emergence

New ventures start with a product vision. Team members iterate on this vision, and after a few cycles and a pivot or two, Vision 1.0 soon becomes Vision 1.4. When such companies scale, the vision will expand and likely become Vision 2.0. As companies grow and step into their preferred future, the vision must evolve for them to stay relevant to an increasing swath of stakeholder groups. Not every visioning session will end with a pithy vision statement (Srinivasan, 2014). Why not? The answer to this question is revealed in the guiding principles for this chapter.

Principle 8:
Emergent and shared visioning practices are upending the traditional vision creation paradigm.

Before unpacking this statement, it is important to give some preliminary information about vision and vision statements.

Pragmatic Definition of Vision

Vision plays multiple roles in organizational life. It connects the present and future, energizes the workforce, generates commitment for stakeholders to go the extra mile, infuses work with meaning, and establishes standards of excellence for team members to give their best (Daft, 2011). A powerful, compelling vision appeals to a broad audience, is widely shared, helps organizations navigate change, elicits faith, hope, and belief, and defines the organization's long-term direction, journey, and destination (Daft). Vision is personal yet collective, lofty yet specific, and strategic yet not quite considered strategy (Anderson & Adams, 2016). Vision is inspirational.

Because leaders cope with the future using various mental models, a vision emerges in unexpected ways. For example, when requesting mission statements in a survey of large Canadian firms, Baetz and Bart (1996) received documents with commonly used titles, including values, vision, beliefs, principles, strategic intent, and strategic direction. Such studies caused Kantabutra and Avery (2002) to choose a pragmatic definition of vision. They surveyed business literature and noticed researchers and practitioners conflated and intertwined future-related concepts. Therefore, they recommended a practical approach to defining the term "vision" based on two factors: (1) the nuanced way individual leaders develop their vision (e.g., rationally and objectively versus intuitively and subjectively) and (2) the variation in the leader's style, vision content, and surrounding context (Kantabutra & Avery, 2003). Future direction can emerge from many sources, particularly in the early stages of a venture. Baum et al. (1998) examined vision in entrepreneurial firms as defined by individual leaders "because it was the leader's actual vision that guided [their] choices and actions" (p. 44). If leaders banish vision to a statement or its creation to a closed-door, once-in-a-blue-moon session, then they miss the opportunity to see vision emerge daily in spontaneous interactions.

On Vision Statements

Vision statement creation generates much attention in business literature. An abundance of literature details conducting visioning sessions (Heim, 2007; Senge et al., 1994), creating a vision statement as a strategy facilitation exercise (Ackerman & Eden, 2011; Wilkinson, 2011), and corporate visioning (Liteman et al., 2006; Srinivasan, 2014). Vision statements are well-established best practices supported by research on attributes and content that compelling visions share.

When it comes to vision statement creation, two factors are related to performance: vision content and attributes. Vision *content* reflects what an organization sees and does not see. The verbiage contained in the statement mirrors the shared mental model of the organization (Baum et al., 1998; Kantabutra & Avery, 2009) and the desired strategic positioning of the business (Kantabutra, 2008). This strategic content may highlight products, services, markets, and ideals (Kantabutra, 2008; Westley & Mintzberg, 1989). This strategic component can function as the central image driving the vision (Kantabutra, 2008). Vision content varies depending on the organization's industry, type of business, and competitive environment, which is diverse and specific to the organization and industry (Kantabutra). Content also varies depending on the firm's life stage (e.g., whether the vision is introduced in a new venture or an established business) (Baum et al., 1998; Ruvio et al., 2010). An early iteration of a vision "may reflect a leader's personal values yet emerge in a way that defies logical explanation" (O'Connell et al., 2011, p. 106). In other words, entrepreneurs often blur the lines between their individual values and their organizational vision.

When looking across vision statements for multiple organizations, similarities became apparent. Based on leadership and business strategy literature, Kantabutra (2005) synthesized seven commonly shared vision *attributes*: brevity, clarity, future orientation, stability, challenge, abstractness, and desirability or ability to inspire. A vision statement should be brief, clear, and future-oriented. It should also be abstract and general enough to withstand changes in the business environment, challenge people to do their best, represent a general idea instead of a specific achievement, and be attractive and inspirational to followers (Kantabutra & Avery, 2002). Kantabutra and Avery (2009) argued that attributes and content within a shared vision held among stakeholders should be common because "both reflect a common future between leader and followers who interpret the shared vision in their own ways and act within their roles and responsibilities to turn the shared vision into reality" (p. 12). The seven attributes "interactively create a significant impact on overall organizational performance initially through follower satisfaction" (Kantabutra, 2005, p. 126). Most importantly, the vision statement should represent a vision understood and not merely memorized by a critical mass of organizational members.

Good enough visions are under-researched. These are initial visions and big ideas that are in a state of becoming. New ventures iterate product visions, and organizations in transition refine change visions into viable, resonant statements of future intent. The process can take some time while groups gradually ready themselves for a vision creation workshop. In a whole group vision creation process, facilitators create a shared experience to draw out individual vision. They aggregate the results. The individuals can see themselves in the organization's future through the content and attributes of the shared vision. The process becomes more complex as more people are involved. This process is the "how" of vision creation: to formulate a statement of future intent, organizations go through the vision creation process. Now, a founder may say, "My organization is new. It is not ready to go all the way just yet. How does an organization prepare a big idea to become a formalized vision statement?"

Visions undergo a process of emergence that increases readiness for formalization. In the crème de la crème of vision creation experiences, a whole group engages in a sense-making and sense-giving process. Initial visions are created and tested for minimum viability outside of and within a visioning session. Leaders want to make sure the vision touches the present situation and pulls the organization into the future ahead of its competition. Does it bring the organization to its leading edge for the foreseeable future? Does it consider the human capital and the unique DNA of the organization? These are considerations leadership teams make when preparing to create formal statements.

The Traditional Paradigm Upended

Static Vision Versus Dynamic Vision

Vision statements should be the culmination of a dynamic process of vision emergence. A vision developed according to CAS principles is dynamic, not static. When vision emerges, statements can grow out of a shared collective reality where a team can bridge the gap between the statement and current reality "to connect its own personal expression of vision and values to the emerging vision in the organization" (Olson & Eoyang, 2001, p. 74). Emergent and shared visioning are upending traditional visionary leadership, and a pragmatic, leader-centered definitional approach to vision leads to a bigger idea: Emergent vision is birthed from the creative tension between future vision and current reality.

Case Example: Creative Tension in 3M's Early Days

The breadth of vision in the early days of 3M helped produce the creative tension needed to overcome obstacles that would have stopped less ambitious visionaries in their tracks. From its inception, 3M was a learning organization. The founders entered an industry and market space they were largely unfamiliar with, aside from observations of a perceived customer need (3M, 2002). Using foresight, one of 3Ms earliest investors, Edgar Ober, saw the future based on the economic position of the United States in the early twentieth century and detected opportunities beyond the scope of what he could readily define.

3M began with a good enough vision, and the founding team experimented with making it a reality. Therefore, it was important for founders to perceive mistakes as ways to learn. With learning came patience for the founders, joiners, and especially the initial investors. Based on their values, the founding team also afforded managers the opportunity and space to learn. It was hardly a choice for 3M's founders. Learning and patience came with the territory.

This learning orientation was one of the critical values that has driven innovation at 3M for over a century. 3M's innovation and learning culture began with a broad, long-term, loosely conceived vision that provided the space and freedom for managers and leaders to maneuver within an innovative culture to produce breakthrough ideas and cutting-edge technologies. The creative tension gave rise to a globally renowned innovation culture that 3M has sustained for well over 100 years.

> Emergent vision is birthed from the *creative tension* between future vision and current reality.

Creative Tension and Organizational Learning

Vision is an innovative concept when introduced into an organization. By nature, vision provides new directions, inspires an openness to new ideas, and helps leaders and followers see differently. Innovation journeys are "typically characterized by tensions, paradoxes, contradictions, and dilemmas" (Coco et al., 2020, p. 104). Such conditions function similarly to the wind shear created by opposing winds of a tornado (Simon, 2019). Paradoxical situations generate the organizational equivalent of wind shear needed to begin turning the wheels of innovation. Leaders who harness contradictory conditions created by a convergence of an organization's past, present, and future can create a climate conducive for a shared vision to grow. The secret to leveraging the gap between the present and the future is found within the idea of creative tension.

> Emergent vision is birthed from the *creative tension* between future vision and current reality.

Paradoxical conditions produce creative tension. Senge et al. (1994) coined the term creative tension in reference to a person "learning to keep both a personal vision and a clear picture of current reality before us" (p. 195). The introduction of a compelling vision generates this tension. Literature on organizational learning suggests that expressions of creative tension and conflict, including continual questioning, inquiry, disequilibrium, and challenges to the status quo, are necessary for sparking productivity, creativity, and innovation (Afzalur Rahim, 2002; Luthans et al., 1995). Leaders hold the reins of creativity and constraint in a healthy tension to help an organization explore the paradox between its status quo and preferred future.

The Power of Creative Tension

The absence of creative tension implies a lack of vision or a poor grasp of reality. Without creative tension, stakeholders can perceive vision as disconnected from organizational realities. When untethered to some form of reality, vision can be seen as "pie in the sky," having precious little to do with where the organization is today. It is difficult to take the first step into a future disconnected from reality. The chasm is too vast, and people will not commit to its pursuit. In such cases, leaders clarify and increase commitment by determining how the vision fits with the marketplace environment and business operations (Olson & Eoyang, 2001). As rule five of emergent visioning states, the vision should be anchored in current realities but not limited by them (see Fig. 7.3). Although Chap. 5 discussed external conditions, their consideration does not stop after vision conception. Leaders should constantly scan the environment and evaluate the organization's response.

The ancient prophet Habakkuk provides a case study of the outside-in approach to vision conception. While church leaders often relate Habakkuk's experience to vision creation, his prophetic senses were tuned into vision and foresight, both of which focus on the future, but neither at the exclusion of history nor present activity. The oracle centers on Yahweh's instructions to "write the vision and make it plain" (Habakkuk 2:2), a departure from the traditional method of dealing with prophecy by speaking it. Habakkuk's vision originated with significant events he detected outside of his unit of analysis: the people of ancient Israel, of which he was a member. The burden felt for his people originated from the injustice and oppression he witnessed while the ancient kingdom of Judah was under Babylonian rule.

Because vision lies on the boundary between the internal and external dynamics, scanning must continue throughout the Vision360 process. Internal dynamics represent another set of realities to consider. Tools like the 7-S model (Waterman et al., 1980) help leaders guide the teams in analyzing gaps between the preferred future and current conditions of the business in areas including skills, leadership competencies, strategy, and shared values. By identifying these areas, leaders can think through changes they will need to make in response to an emerging vision.

Counternarrative: Vision, Culture, and Antibodies

"The fearless leader took the stage and painted a picture of the future. The people left inspired and carried out the vision without delay. And they all lived happily ever after," said No One. Ever.

The story usually follows a different narrative—one that scales mountains, fords rivers, and meanders through the valleys. The actual account includes a counternarrative that sounds more like this:

> The fearless leader took the stage and cast a vision for the future. Some people left on an emotional high. They "got it" immediately. The majority left confused and needed clarification. Most people had questions. What would change? What would stay the same? How would the changes affect my job? (Notice the questions ask "would" instead of "will." In their minds, vision is a scenario, not a sure thing. Even if the leader mandates acceptance, the vision may or may not happen due to so many moving parts.) Before the leader can address many of the questions, people start talking about the changes around the water cooler. They ask each other what they think. They will employ the consulting starting point for shared visioning, even if their leader has not. Pretty soon, a promising vision has made a sharp left turn toward the Adoption Pit. Such a fate does not befall every vision. It does happen enough for one to wonder, "Why?"

Insight: New Ideas Are Potential Threats

Company culture has become synonymous with employee happiness and satisfaction, but culture represents much more than a feel-good, relaxed environment. Founders and early joiners establish a culture by forging through the business environment while organizing internal work to forge best practices. The first section of Chap. 8 will go more in-depth, but new organizations have become established in this way. Cultures form long before most employees join organizations.

Fast forward 15 or 20 years later. The organization has succeeded in scaling the company and has realized its vision set more than a decade prior. Who pings the culture? Who alerts the status quo? These elements will continue as is until a leader decides the culture needs to realign with the company's future direction. Any idea that comes up against the culture will meet resistance. The more misaligned the idea, the more resistance it will meet all the way up to a level five, World War III type of conflict.

Vision is a big idea—and a *new* idea. Management professor Jeff Kohles and his colleagues proposed that vision is an innovative concept that can either be accepted or rejected by an organization. When a leader introduces vision, the culture will initially appraise it as an external threat unless trained to treat it differently. Anything new—ideas, vision, change, strategy—is perceived as a potential threat. In biological terms, these invaders are treated as antigens.

Auto Immune Analogy for Internal Threats

The human body treats bacteria, viruses, allergens, and other antigens as invaders when they enter the human body. The organization is a collective body. It also views foreign substances—misaligned values, unconventional practices, and untested ideas—as external threats when they originate outside of itself. An example of an external threat is a company that sends a double agent to spy on a competitor and gather information about their next move. The two companies are rivals; they have always been rivals, and they will always be—can you guess?—yes, rivals. Do you know any companies that fit this description? The SWOT analysis—used to assess strengths, weaknesses, opportunities, and threats—provides a framework for developing the skill to neutralize the impact of perceived threats. The external threat is a problem that's relatively easy to understand and solve.

The problem comes in when the culture of the established organization starts fighting a change within the organization as if it's an unmitigated external threat from the business environment. In this case, the organization begins attacking itself. In biology, this is akin to when a patient has an autoimmune condition such as lupus, rheumatoid arthritis, or celiac disease. Vision is treated as a threat that is imposed on the organization from the inside—by well-meaning executives and top management teams. The culture deploys antibodies to fight the imposed/unshared vision, which it considers an antigen. Why? Because the vision threatens the status quo (i.e., the culture) and, in turn, the body or the organization turns on itself. This internal fight causes all types of problems. Then, the question becomes, "how do we prevent an organization from attacking new things?" Teach it how to see new ideas differently (Table 7.1).

The quick answer is to have new ideas, even big ideas, emerge from the organization's culture. This response hearkens back to a principle from Chap. 5. It is almost like you're tricking the culture into thinking that the "new thing" was its own idea. (Assistants will use this strategy with narcissistic bosses.) Just like a human body can manufacture antibodies to fight perceived antigens and pathogens, a company culture can manufacture antibodies that support a change in direction and prevent the eventual demise of the company. Ideas are manufactured just like antibodies to fight antigens and gain immunity against them.

What are best practices? The most effective strategy in an organizational setting is a shared experience where every major stakeholder group is represented. That way, the organization perceives this new initiative to be derived or created on the inside—as a component *of* the culture—and not from the outside, thus posing a threat *to* the culture. Brainstorming, design thinking, and visualization all represent

Table 7.1 Immunity table

Condition	Description	Response
Immunity	The body's defense against an *external* threat	Deploy antibodies
Autoimmunity	The body's defense against perceived *internal* threats	Deploy antibodies

positive antibodies to combat the forces of entropy that take down organizations each year. Innovation experts have written books on these topics.

When an organization has learned to see, leaders can allow vision to emerge. When vision emerges, it does so informally—spontaneously. Leaders cannot control this process and still reap the full benefits of vision emergence. The leader must allow the organization to create new things internally by having it grow out of the culture instead of standing in opposition to it.

Case Example: Cities Skylines

The popular strategy game Cities Skylines emerged within the context of user experience (UX). In 2013, the gaming community was reeling from its much anticipated but unsuccessful launch of SimCity. Finnish-based game development studio Colossal Order listened to how the desire for a new city simulation experience began to emerge from the gaming community. By listening to user feedback, Colossal Order crafted Cities Skylines as a city simulator's dream game, considering both the must-haves and unmet expectations shared by serious gamers. To date, the estimated revenues of City Skylines exceed $250 million. The product vision emerged in response to the developer's commitment to listen to the *gaming community*—specifically the players. The timing was also correct. The gaming community had much to say about their unmet expectations in the wake of Maxis' and Electronic Arts' launch of SimCity (2013). The leaders of Colossal Order listened, delivered a superior experience, and iterated the game—including the gaming community in the development of Cities: Skylines.

Visionary organizations create spaces and even capitalize on existing spaces—existing containers (Fig. 7.2). One of those containers is the user experience. One must be able to collect user feedback and see beyond their complaints to detect unmet expectations and market opportunities.

To maximize insights collected from the users' experiences, it helps to leave the office (whenever possible) and talk to team members, customers, and other stakeholders. This is a chance to build trust by giving voice to their concerns. A leader who acts with any other motive will be spotted. Followers can smell ploys a mile away. They can pick up on a whiff of insincerity before they can identify what's going on—ask employees whose companies have recently been acquired. They feel the rumblings of mergers and acquisitions way before the ink dries on the formal purchase agreement.

So, leader, when you go out, be prepared to hear them, listen objectively in the moment, and reflect on their feedback. You are literally going through a personalized data collection process. Don't move into analysis mode while you're listening to them. Just collect the data. If collected objectively, the data will represent their perspectives and add levels of granularity to your vision through use cases and stories.

Containers for Vision Emergence

Cultural values take center stage in the NUMMI example, illustrating culture change as one container for vision emergence. Several other containers are listed below.

The following group settings are ripe for vision emergence:

- statement creation (e.g., vision, purpose, mission, values)
- strategic foresight and scenario planning
- strategic thinking
- any whole group collaborative process
- issues management workshops

Closely related disciplines often contain collective vision-related insights, such as:

- values
- purpose
- strategy making
- strategic planning
- technological advances
- trends and disruptors
- design thinking
- creativity
- innovation
- organization development, change, and transformation
- structure and design (and sub-organizational visions)
- culture
- personal vision
- discussion involving differences in leader-follower time-orientation (i.e., present, past, and future orientation)
- governance
- engagement, well-being, and work-life balance
- meaningful work
- succession planning and management
- human resource management
- leadership and talent development
- any discussion on development and growth

Fig. 7.2 Containers for vision emergence

The Visionary Leadership Paradigm Shift

Chapter 5 discussed shared visioning at length. It explained the "why" behind the need for shared visioning and the need for adoption. The role of values in relation to a preferred future was also discussed. Core values are deeply connected to organizational identity. To borrow a concept from Craig Van Gelder, an organization does what it is.[2] Vision emerges from an organization's DNA—from its identity, purpose, and collective destiny. An organization's unique identity shapes the way its members do everything—even visioning. So why should leaders, especially Founder-CEOs, build a shared vision with their internal and external stakeholders? What are the benefits?

[2] Van Gelder originally stated, "the church does what it is and organizes what it does." Both churches and organizations are collective bodies of individuals, therefore the phrase has been recontextualized to fit the purposes of this book. For more information, see Van Gelder, C. (2007). The ministry of the missional church: A community led by the spirit. Baker.

The Development of Shared Visions

I witnessed the power of shared visioning as an independent contractor for a church that had merged two congregations 20 years prior. During my first nine months there, members of the congregation were fully entrenched in a Level 4 conflict, evidenced by low attendance, turnover of critical employees and volunteers, and an ousting of the pastor. During the next 12 months, with heavy intervention by the denomination, the leadership team worked with the general body to create a common direction. This initiative resulted in higher morale, healthier use of conflict, and increased engagement of staff and volunteers.

Burt Nanus wrote the initial book on visionary leadership and emphasized the importance of vision as a unifying agent. He explained that a lack of alignment and absence of shared direction would cause an organization to be pulled apart by myriad opposing forces and conflicting interests (Nanus, 1992). The process of building a shared strategic direction solves misalignment and infighting issues if people are willing to sit down, listen to, and show respect for the experiences of others. Aligning stakeholder groups allows organizations to allocate appropriate resources to growth while mitigating potential risks posed by internal actors and external forces.

Shared visioning has salient benefits and value for organizations. Some authors emphasize the importance of vision being "jointly owned, shared, or assimilated by organization members" (O'Connell et al., 2011, p. 117). So, what is a shared vision, and why is it important? Amassing personal vision into organizational vision calls for a shared visioning process (Senge et al., 1994). Shared visioning is a process leading to the outcome of a shared vision—a product tested in the adoption phase. Pearce and Ensley (2004) explained that shared vision is "a common mental model of the future state of the team or its tasks that provides the basis for action within the team" (pp. 260–261). This definition is logical because vision is recognized as a cognitive construct (Kantabutra, 2008; Strange & Mumford, 2005). A vision's power is "most completely unleashed when it is successfully institutionalized as a guiding principle, with a common image of the future owned by all important actors" (O'Connell et al., p. 117). The co-creation of a shared team vision represents a core process of new ventures started by a team of entrepreneurs (Hensel & Visser, 2019). Founding teams may move through this process together, but in some cases, this co-creation process needs to be repeated more often at later stages of the organization.

What Is the Role of Individual Vision in Organizational Settings?

The "organizational visioning" construct (O'Connell et al., 2011) associates visionary leadership with creating, communicating, and adopting a written vision. However, the role of personal and organizational vision is "less clear and more complex than much of the literature suggests" (Davidson, 2005, p. 151). Viewed using Maslow's (1943) theory of human motivation and the associated hierarchy of needs, individual vision contributes to employees' self-actualization needs. Shared vision contributes to team members' need to communicate with others to contribute to a collective sense of belonging. Citing the example of Dr. King's "I Have a Dream" speech, leadership expert Jim Kouzes explained, "any vision statement that really resonates…was latent and evident in the people. [Leaders] can draw it out or recognize that it is already there" (Kouzes, personal conversation). Building a shared vision begins with recognizing team members' dreams that often lie dormant and suppressed by individual and organizational norms. Hughes et al. (2014) refer to latent vision as "implicit aspirations," which, unlike official vision or (core) values statements, are not formalized components of organizational identity (pp. 75–76). By bringing personal vision into the picture, leaders can help team members avoid emotional detachment (Senge et al., 1994) and become attuned to the vision (Goleman et al., 2004). After all, team members must learn to see as individuals before attempting to see as a collective. An inability of stakeholders to see things from a personal perspective could hinder the organizational visioning process and keep a shared vision at bay.

How can leaders make sure others buy in? Visioning sessions with the top management teams or even a solo session with the CEO share one thing: their visions are represented in the final product. The representation of personal vision is critical to achieving acceptance and moving through the adoption phase to vision integration. Leaders must ensure stakeholders' overlapping hopes and dreams are represented in the collective vision. The old mandate was "implement this vision or reconsider your future with this company." The new mandate is "everyone must leave their fingerprints on the organization's future. We want future generations to know you made an impact."

The Value and Benefits of Shared Vision

"Why should my company spend time to develop a shared vision?" This is a fair question, considering in some respects, vision has gained a less-than-stellar reputation. Davidson (2005) proposed several reasons visioning has earned a bad name. First, organization vision statements contain "lofty, poorly defined language" at the expense of illustrating how the vision will be realized through goals and required behaviors that will guide daily movement toward the destination (p. 150). Second, managers can regard future thinking as "touchy-feely" due to a preference for conducting analysis with concrete data rather than using the imagination in a future-oriented way. Third, some leaders experience an "underlying ambivalence about how a vision functions in complex organizations" (Davidson, p. 150). In each case, vision can seem nebulous, and its value is disconnected from everyday activity.

There are several benefits to establishing a shared vision. Even though the effect of vision on performance is not fully understood, especially in small business contexts (Jing et al., 2014), the link between shared vision and high performance is well-established in business literature (Kantabutra & Avery, 2009). Moreover, shared vision positively impacts the performance of entrepreneurial firms (Chi-hsiang, 2015), workgroups (Fellnhofer et al., 2016), and corporate ventures (Van

Doorn et al., 2013). García-Morales et al. (2006) found a positive relationship between shared vision, organizational learning, and organizational innovation. Their results suggested that shared visioning supports organizational learning and innovation “if many people become committed to a shared vision because it reflects their own vision” (García-Morales et al., 2006, p. 33). Rote memorization is quite different from vision reflection, as discussed in Chap. 5.

> The formulation of a good enough vision statement should reflect group insights—bringing the learning process to a **crescendo**, not a conclusion.

The Crescendo of Vision Creation

When it comes to an organization learning to see, understanding the vision is more important than remembering a pithy statement. Committing a vision statement to memory neither ensures follower commitment nor the alignment and support of existing organizational structures. True learning and internalization of the vision overrule rote memorization. The unifying and inspirational effect of collective visioning leads to the development of shared language and understanding, allowing team members to see beyond the inconveniences resulting from changing their routines. Davila et al. (2006) emphasized the importance of a shared vision to create “alignment in the organization resulting from a shared understanding of what is important for the organization (as opposed to what is important for my part of the organization)” (Davila et al., 2006, p. 212). A shared understanding of organizational goals allows senders and receivers of knowledge to decrease misunderstandings when discussing company-specific practices and routines (Reiche et al., 2015; Tsai & Ghoshal, 1998). Shared vision impacts learning through shared understanding, which counteracts the uncertainty component of VUCA. Additionally, Dionne et al. (2004) posited that creating a shared vision may positively impact team cohesion and partially mediate the relationship between a leader’s idealized influence and inspirational motivation and team performance. Shared vision may link to multiple components of transformational leadership.

Because people want to be involved in the vision development process, they will not work as enthusiastically toward something they did not help create (Kouzes & Posner, 2017). Ideally, leaders would collaborate with other stakeholders in shared visioning and strategy-making. Given that shared visioning is a key to high performance, why don’t more leaders do it?

Limitations around time, budgets, ability, and readiness often prevent leaders from co-creating a future direction. Time and budgetary constraints cause a departure from the shared visioning ideal, and leaders frequently settle for less participatory methods. For example, level one shared visioning (i.e., telling) can be brought on by a crisis in which the organization lacks the necessary time for selling or other participatory methods. Furthermore, such cases result from scotoma and the lack of 360-degree, vision-related leadership practices such as horizon scanning and trend recognition. By design or default, organizations can end up with a good enough vision.

Organizational Visioning

To truly understand the "how" of collective visioning, it is critical to delineate the multiple ways it occurs. In a previous chapter, we discussed the five starting points for shared visioning (Senge et al., 1994). As a founder shares their product vision with early customers, they accumulate a following. Customers who "get it" tell others. Each loop implies a different number of stakeholders involved, ranging from the lone visionary to the whole organization.

O'Connell et al. (2011) identified four ways visioning occurs in a way that integrates the "who" factor. In the *first approach*, a leader single-handedly creates the vision and conveys it directly to followers. In the *second approach*, a key leader and a group of top managers create the vision and communicate it to followers. In the first two approaches, the single leader or leadership team can tell or sell the vision to followers. The method of choice is closely related to the urgency of the problem triggering the vision search.

Hopefully, leaders have engaged or listened to followers' concerns and ideas before communicating the vision. This is not always the case. Davidson (2005) described a recurring stumbling block organizations encounter when attempting to develop a collective vision to set the stage for organizational change or alignment, saying:

> The vision statements may be shared by a few leaders or by those who generated them but not by others in the organization. People seldom reference the elements of the vision when making day-to-day decisions or when developing goals or work plans. Vision statements sound great but do not perform a useful function that makes a performance difference. (p. 150)

This recurring stumbling block prompts the need for a checkpoint during the emerging vision process. It incites the question, "is the vision truly shared?"

When a vision stops at the upper echelons of an organization, it is not truly shared. Because organizational vision is not created in a vacuum, leaders should spend time talking and listening to a cross-section of stakeholders before crafting a vision (Bennis & Nanus, 2007; Hackman & Johnson, 2013; Kouzes & Posner, 2017). Personal visions reach critical mass when they "cohere in a common sense of purpose within a community," touch the moral character of a strong mission, and engage organizational members to pursue something unique that supersedes both their immediate self-interest and productivity targets (Kantabutra & Avery, 2009, p. 11). In the *third approach*, leaders and followers work together "in a sense-making and sense-giving process" to co-create a preferred image of the future. The vision is gradually modified through iteration in response to leader-member exchanges (Gioia & Chittipeddi, 1991).

I began to awaken and become interested in organization development right around the time Starbucks launched its aggressive growth strategy. Stores popped up everywhere. But around 2006, I detected a decline in quality. After stepping into a local store in central Virginia, I gradually sensed that the store's atmosphere had drastically changed. The smell of burnt cheese had replaced the aroma of Arabica beans. Kitschy stuffed animals and compact disks filled the makeshift aisle leading to the cash register. I remember walking into a store and being completely disoriented with the changes that were characteristically *not* Starbucks' quality. The customer experience changed during that era—first slightly, then suddenly. With the help of the organizational transformation consulting firm SY Partners, Starbucks' Founder-CEO Howard Schultz rallied the troops to turn around the company. Although at the helm, there was no way Schultz could achieve this feat alone. It required all hands on deck.

In the *fourth approach*, the whole organization immerses itself in a large group collaborative process to develop a vision (O'Connell et al., 2011). Group collaborative visioning typically happens in one of two ways. The first uses a task force model, and the second involves engaging an entire organization or a significant portion in the process (e.g., Starbucks' reinvention initiative upon Howard Schultz's return as CEO). Whole group sessions develop and build commitment to a shared vision (Sosik & Jung, 2018). A group format is the optimal vision emergence container, and it is where the emergence process naturally leads if properly accommodated and not truncated.

"Gauging Readiness for Shared Visioning"
Is your organization ready to co-create? Or is the vision still emerging? If the vision is still in the early stages of emergence, it may not be time to co-create a vision statement. However, that doesn't mean the organization would not benefit from a group process that moves the vision emergence process closer to the creation session.

Iterating Vision

Vision is iterative. Startups and new ventures are living proof. Watching an entrepreneur conceptualize their vision, learn how to convey it to others in a way that inspires them to buy in, and then seeing how their founding team experiments with their vision places the iteration process on full display. However, many founding entrepreneurs stop progressing through the five stages of vision iteration after the testing phase. Future research should examine the vision journey of founder-CEOs who make it to the consulting and co-creation stages of shared visioning.

"Good enough vision" is synonymous with vision iteration. Olson and Eoyang (2001) recognized "the impossibility of a clear and explicit vision of the future in an inherently unpredictable system" (p. 74). Instead, leaders should shepherd the vision to an acceptable state (i.e., the quality of a beta test) and then start moving and acting "and watching for patterns and direction to emerge" (Olson & Eoyang, 2001, p. 74). The need to build visions from the bottom-up and for stakeholders to engage in the co-creation process becomes more critical as the company expands, workers age, and members of the founding team move on to work in other companies. Olson and Eoyang (2001) proposed:

> Developing a vision in a CAS requires understanding the present dynamics and letting system members build possibilities for the future. Vision emerges from the space where order and disorder cross over in the rich interplay of experiences, thoughts, and connections of system agents. (p. 73)

As the agents and experiences increase, so does the complexity. If not careful, the vision of the people will outgrow the founder's capacity or willingness to aggregate diverse perspectives.

Vision Emergence: A New Paradigm

The journey toward a shared future is far from linear. Ironically, the literature on the meandering process of vision emergence is scarce. What better way to learn from organizations than through the backstories of proven companies? The story of 3M is a story of vision emergence ranging from the initiation of a vision accretion cycle to the assembly of a "good enough vision."

Case Example: Strategic Change at Early-Stage 3M

Three years into the venture, 3M's limitations began to overshadow its strengths. First, the founders lacked the know-how to build a mining and manufacturing company. They perceived an opportunity and went after it. Second, 3M's raw materials were unavailable in the United States. The founding team originally intended to mine corundum in Northern Minnesota. Corundum is "a mineral used to make high-quality grinding wheels; however, the mine produced anorthosite, a relatively soft low-grade ore, a mineral the founders used to make sandpaper instead, thus preserving the company (Garud et al., 2011, p. 742). This discovery was more than a disappointment. It required a business model pivot. Third, on-hand cash was low due to the high-risk nature of their industry coupled with unforeseen situations and unmet expectations. Lastly, they still needed to get a product to market (3M, 2002, p. 5).

By the time 3M figured out how to solve the first set of challenges, new troubles arose. To solve production challenges, they decided to import the raw material, garnet, and construct a new sandpaper plant in St. Paul. By the relocation to St. Paul in 1910, the laundry list of limitations—"First, a worthless mineral, then virtually no sales, poor product quality and formidable competition" would dominate the weaknesses and threats section of their SWOT analysis (3M, 2002, pp. 5–6). When they moved into their new two-story plant, the main floor collapsed, sending every carton, bag, and container plunging to form a giant heap in the basement. The story went on similarly for about a decade before they emerged from break-even as a profitable business. 3M's early story is one of vision emergence.

Vision Emergence and Creation Can Co-exist

Businesses are born through organizational emergence. Leaders harness the complexity of VUCA to a degree, but there is no way to predict exactly what will go wrong, who will buy-in, and how much time implementation will require (Burke, 2018; Olson & Eoyang, 2001). Because the end state in complex adaptive systems (CAS) is challenging to predict, Olson and Eoyang (2001) recommended the image of emergence where "each moment moves into the next to define new options and possibilities. Every beginning is indeed an ending, and every ending is a beginning…. each point in time as contributing something vital to the flow of reality" (p. 75). In some form, the process of emergence continues throughout the lifecycle of a business.

The principles associated with complex adaptive systems shed new light on traditional visionary leadership theory. Olson and Eoyang (2001) recontextualized visioning in light of spontaneous self-organization among decentralized parts of a system. In this context, a vision emerges from the fringes of a system (e.g., in a bottom-up manner in hierarchies)—from interactions and relationships among the system's parts. Thus, vision often originates with stakeholders, not the top leader (Bennis & Nanus, 2007). Initially, an organization's preferred future emerges from countless conversations between organizational actors. The vision also breaks forth when observing the interactions between internal and external components of the system.

The seeds of vision statements are planted early. They sprout up out of a collective reality filled with shared experiences. A compelling vision emerges in partial response to conditions that triggered it (O'Connell et al., 2011). Therefore, the top leader's responsibility is to synthesize individuals' hopes for the future with external business conditions to decipher the collective vision. Therefore, the parameters of the preferred future are continually shifting—especially in the leader's mind while taking the information from these exchanges. Developing a vision in this context "requires understanding the present dynamics and letting system members build possibilities for the future" (Olson & Eoyang, 2001, p. 73). In a truly shared visioning experience, organizational members build bridges between personal and collective vision on multiple organizational tiers. A leader or leadership group uses their agency to bridge the gaps between the emerging vision and the collective reality "to connect [their] own personal expression of vision and values to the emerging vision in the organization" (Olson & Eoyang, 2001, p. 74). Companies with high levels of trust between leaders and followers are primed for vision to break forth.

The formulation of a good enough vision statement should reflect group insights—bringing the learning process to a crescendo, not a conclusion. Organizations learn to see as a collective unit through shared visioning as they consider diverse stakeholder perspectives. They learn to see and, therefore, understand through vision emergence. In this process, leaders and team members assemble an iteration of their collective vision. The emerging vision is not always finalized in the vision creation stage. Instead, it continues on the road to adoption as leaders figure out how to take action while allowing vision to continue emerging. (The answer is found in "creative tension.") This type of self-organization goes hand in hand with learning.

Containers for Vision Emergence

Vision can break forth in unexpected ways and innumerable contexts whenever a preferable future intersects with current realities. Such interactions keep the vision grounded while simultaneously allowing it to emerge. The practical expressions and reflections of vision—ways leaders and followers think about vision—function as contexts, or "containers," for vision emergence.

American business culture gave rise to the notion of creating or formulating a vision statement. The idea that visions are assembled in a one-time exercise is a product of context. The visioning process is contextualized mainly from a Western worldview and married to the values of corporate America. Eastern business culture approaches visioning from an emergent approach, and the vision statement session is only one type of container for vision emergence. Just as vision can emerge from values (i.e., values provide the context for vision), visionary leadership theory emerged from American business values. As illustrated in the NUMMI example, clashing cultures represent conflicting values and ideologies. When left unresolved, such conflict can place global ventures in jeopardy.

Personal Reflection: Can Vision Emerge in Chaos?

One spring afternoon, I heard a school security officer yelling down the hall for a few seventh graders to go to class. None of the students were given passes. In fact, only two out of more than 30 classes walked in straight lines. Many staff members spent more time at each other's throats than being proactive.

When some of my peers learned where I worked, they looked at me like they had seen a ghost. I asked them, "what's wrong?" They would always respond, "you know that's the worst school in the county, right?"

This scene was from my first full-time job. When I was hired, this kindergarten through eighth-grade academy was in the middle of a transformation. In previous years, it functioned as a middle school housing grades six through eight. Over the summer, it transitioned into an academy housing nine grades plus pre-kindergarten students. A change in leadership, withdrawal from a previous academic program, and the establishment of a school-wide Title I program made for a tense work environment. Thankfully, my direct supervisor was the primary change agent at the school. She oversaw our team in starting and rolling out the Title I program. It was through this experience I learned what emergent vision looks like.

Vision can emerge when you are surrounded by complete chaos—if you can see your present situation and then see beyond it.

Chaotic situations surround people—leaders, managers, and team members alike—with images of what they do not want for their future. Chaos pulls at the decision-maker within. The inner decision-maker has to choose this point. Either the individual can give into the conditions and culture that surround them, or they can view the conditions as negative examples and search for positive examples that affirm what they really want in life. In other words, feeling dizzy in the whirlwind of a chaotic situation can force a decision-maker to choose what they really want in life. Velocity is made up of speed and direction. Instead of slowing down, ask yourself, "how can I change direction?"

Jim Kouzes once pointed out that before leaders and employees can contribute to the shared visioning process, they need to gain clarity on their personal vision for the future. What does that tell us? First, it is easy for a leader to confuse their personal vision with a business vision when their vision is poorly defined. It's like the CEO who sees himself and his business as being "one in the same" instead of seeing the business as an extension of himself. Second, employees who cannot see will have trouble contributing to the visioning process.

How does one eke out a vision in the midst of a chaotic situation? It comes down to changing the way you see things. Here are three tips:

Change your perspective. Patterns emerge even in chaos. In the above example, I combed the building for team members who thought outside of the box and connected with a lifelong friend and mentor. Without adequate funding, the school could not afford textbooks, and we had to improvise. She taught me how to teach without textbooks. Visualization techniques came in handy when teaching rambunctious second graders how to apply the rules of symmetry!

Affirm your values. Every day was an adventure when employed at the school. On days when my world had spun off its axis, I would process my thoughts and feelings through journaling. Little did I realize my journals contained an argument. I was literally writing about the reality of my situation, then I would argue against it. Each argument defended my core values—such as integrity, professionalism, and respect—principles that I seek to live out even to this day.

Take the opposite action. I will never forget the day I decided to actively counteract the culture of the school—to swim upstream. I refused to let the culture change me, and I decided to affect it. One morning during breakfast, I saw a 3rd grade student laughing to himself. I mean, he was literally one step away from literally ROTFL. I walked up to him and curiously asked, "Javonte, are you alright?" He started pointing to an older gentleman wearing traditional Indian attire and said, "he's wearing a dress!" After sizing up the situation, I realized Javonte had little exposure to people from other countries. I do not consider myself a cultural expert, and even less so fifteen years ago. So I conveyed basic knowledge of Indian culture and explained to Javonte: "in his culture, what he is wearing now is just like the clothes you would wear to church...like a suit and tie." Javonte immediately stopped laughing, dropped his head a little, and continued eating his breakfast. At that point, Javonte's vision—or his perspective—was enlarged. He could see things differently.

An old proverb says, "where there is no vision, people cast off restraint." At their worst, certain team members will run amok without the hope of a better future. Or, at best, they will keep doing what they're doing until it doesn't work anymore. But visionaries do things a little differently. I once heard someone say, "If I cannot help myself, how in the world can I help someone else?" Consider this alternative perspective. When vision is tested in chaos, you can enlarge your own vision by helping another person to clarify theirs. When you've reached your wits end, it could be a new beginning. Go ahead and make the decision to write the next chapter. The choice is yours to make.

The NUMMI Story

In the early 1980s, General Motors (GM) realized it was losing market share to Toyota and approached its most fierce competitor to propose a joint venture (Cameron & Quinn, 2011). GM hoped to fix its performance record, but Toyota hoped to gain experience by opening a plant in the American market. The shuttered GM plant located in Fremont, California, known for its toxic culture, was suggested as the site for the venture. Toyota agreed to GM's proposition under one condition: Toyota's managers would operate the plant. Thus, New United Motor Manufacturing, Inc. (NUMMI) was founded.

Toyota's production system made it easy to recognize and solve problems and learn from mistakes (Shook, 2010). In under a year, Japanese managers turned around the plant with many of the same workers by changing assumptions about problem-solving and making mistakes, which positively impacted employee behavior. Toyota's management team turned the plant around by instilling learning-centered values, empowering employees, increasing their sense of ownership, and providing management support for problem-solving and improving product quality (Cameron & Quinn, 2011; Shook, 2010). Through these actions, Toyota's managers decreased absenteeism by 18%, eliminated unresolved grievances and strikes, increased productivity, and reduced costs (Cameron & Quinn; Shook). Toyota's management culture and associated values were the primary reasons they could turn around employee performance despite barriers to profitability.

Although the joint venture illustrates a successful culture change in response to an organizational crisis, NUMMI had as much to do with values as it had to do with vision. Japanese managers are generally more introspective, nurturing, and others-oriented than American managers, who stereotypically demonstrate qualities associated with talkativeness, insensitivity, and impulsive, direct, and individual-oriented behaviors (David & David, 2015; Morgan, 2006). Moreover, the concept of *Wa* is as critical to Japanese business as *guanxi* (saving face) to Chinese culture and individualism to American culture (David & David; Henslin, 2014). Therefore, Japanese management culture works to ensure group loyalty and consensus, and Japanese managers "evaluate the potential attractiveness of alternative business decisions in terms of the long-term effect on the group's Wa" (David & David, p. 339). GM's managers wanted to remain competitive within their industry, which caused an openness to a new way of operating and the group-oriented values found in Japanese management culture. Such values and assumptions change very slowly, if at all, outside of a major jolt to the system or pressures from outside influences (Burke, 2011). The NUMMI situation imposed both.

Vision Emerged Through Cultural Values at NUMMI

Strikingly absent from the NUMMI story is the mention of a vision statement despite the level of vision integration accomplished. When the plant closed in 2010, the NUMMI mission statement read, “Through teamwork, safely build the highest quality vehicles at the lowest possible cost to benefit our customers, team members, community, and shareholders” (NUMMI, n.d.). The company’s core values were described as five cornerstones of “teamwork, equity, involvement, mutual trust and respect, and safety” (NUMMI).

The NUMMI joint venture provides an example of a vision emerging through core values. The multiple preferred futures at play in the NUMMI situation—those of the Toyota and GM corporations, the United Auto Workers union, and the individual Fremont plant workers—emerged from the Japanese management values instilled when the plant reopened. GM could not have turned around the Fremont plant apart from the moderating force of Toyota’s management culture. The guiding principles of the Toyota managers made room for the diverse and sometimes conflicting visions of the influential stakeholder groups.

Organizational Identity and Time Orientation in Vision360 Leadership

An organization’s identity is anchored and bounded in time. The central, distinctive, and enduring elements of an organization (Albert & Whetten, 1993, as cited in Whetten, 2006) contain “a temporal orientation of past (i.e., who we used to be), present (i.e., who we are), and future (i.e., who we want to become)” (Boal & Hooijberg, 2000, p. 527). However, past, present, and future converge “in the vision of the leader and the articulation for change” (Boal & Hooijberg, 2000, p. 527). The past and present also shape the realities for a preferred future to emerge.

Conventional strategic planning frames the future as a continuation of the past. Traditional leadership literature assumes “organizations and leaders face knowable futures.” From this vantage point, leaders take action in the present in an attempt to reduce complexity and uncertainty, control the future, and direct followers to follow pathways leading to prescribed future states (Plowman et al., 2007). This perspective provides a sense of certainty, albeit false. Leaders anticipate, shape, and enable the future in complex systems rather than control it (Plowman et al.). Deep knowledge of external conditions and the organization’s identity and situation helps leaders avoid pie-in-the-sky visioning exercises.

Vision and strategy sessions are effective ways to ground the vision in both external and internal realities and awaken an organization to the need for transformation and change. Strategic foresight activities help aggregate collective intel that firms can use to map external realities. Scenario planning, horizon scanning, and forecasting are commonly used futuring activities.

The founder needs to envision the organization in the *future*, recognize, anticipate, and think about vision iteration phases. In addition to envisioning the future organization, founders should also imagine their role continuing into the foreseeable future and what it will require to remain in their desired position at a different stage of the game. Knowing this will help determine if they are willing to put in the work to become what the organization will need in the long term. Founder-CEOs especially must anticipate the future and take an inner journey to evolve, simultaneously turning an organization into its future self. This happens through a mix of development-related activities, including personal, executive, follower, leadership, and organization development. Development is the topic of Chap. 8.

Contrary to foresight activities, vision and strategy sessions ground a preferred future in a company's identity and internal realities. In an interview discussing factors involved in successful change initiatives, a future-oriented president of a small Ohioan manufacturing company shared a visioning strategy she uses with her 18-person team. The vision has transformed over the last few years, and she did not realize that her team had not gotten the opportunity to share in its creation. She knew where the company was headed but realized she needed to improve the communication of this direction.

In response, the company president began facilitating open discussions about guardrails, assisting team members in setting boundaries that would get them closer to their vision to avoid taking divergent paths. The small business team analyzed HBR cold case reviews to detect where organizations deviated from the path leading to their preferred future. Finally, they began to role-play by randomly selecting team members' names from a hat. These team members stepped into the role of CEO and would explain the company's vision from their perspective and in their own words. The CEO got to hear what was important to team members about the vision for the company. The role-playing activity led to conversations about sales strategies to achieve the vision. Employees began to ask, "How does the vision translate to me?" The president also started holding meetings with the director of engineering to figure out how to translate the vision to the team and through their daily work. She is convinced that these activities will accelerate their progress. This case illustrates that the leader's task is to lay the groundwork for the Vision360 model and create a healthy tension between agency and emergence. Experimenting with the vision allowed the company president to listen to stakeholders' perspectives and gain an understanding of where they stood in reference to vision adoption and integration.

A leader's fundamental duty is to capture what followers sense, feel, hear, and detect going on around them, integrate it with their deepest desires, and translate it into something coherent and meaningful for the entire organization. They often construct this type of meaning through a unifying vision. How leaders use their agency relates to their leadership style and the degree to which they have modified the approach to accommodate follower preferences and the specific organizational situation. Organizations that adopt a multidirectional approach to visioning simultaneously mobilize outside-in and inside-out leadership approaches. Firms that adopt an emergent approach to visioning open themselves up to new ideas—no matter what position a stakeholder occupies, their vision can be heard. These organizations embrace leader agency and self-organization, creating a balanced approach to vision development and realization. The multidirectional perspective also contains the outside-in approach to visioning, as related to foresight.

> …our future prosperity depends on the quality of our collective imaginations.
> —*Eric Ries*

Orchestration: A Function of Leader Agency

Organizational antibodies attack innovative ideas when they perceive them as an imminent threat to the culture and status quo. For a vision to contribute to peak performance, it is crucial to minimize the appearance of negative antibodies. Leaders who orchestrate vision emergence minimize the unnecessary deployment of negative antibodies against a preferred future. The organization perceives the new, big idea as part of itself—not as a threat to its existence. The presence of a shared vision causes the common understanding needed to align people, structures, and systems. When people understand what changes the vision will cause, and what will stay the same, leaders can minimize the appearance and impact of organizational antibodies (Davila et al., 2006). Developing such a sense of understanding requires collective learning, as a lack of such common knowledge can result in unwarranted attacks on innovation efforts.

Balancing Emergence with Self-organization

At first glance, leader agency and vision emergence appear to be opposites. Still, each plays a vital role in stitching the vision development and realization process together over the long term. On the one hand, the leader intentionally moves the organization in a different direction. Change agency is introduced by creating a vision and sustaining it by keeping it in front of everyone. In a hierarchical structure, this happens from the top down. In a networked organization, change agency occurs from the inside out (i.e., starting at the hub and moving toward the fringes).

On the other hand, the vision emerges from interactions and relationships among the parts of the whole system. Emergence happens from the bottom-up in a hierarchical structure. In a networked structure, it occurs from the outside in. Vision does not always originate with the top leader. It can arise from a leader's conversations with followers and from observing the interactions between actors and components within the system. The parameters of the vision change constantly, but vision is generally realized through a combination of leader agency and emergence as organizations move through the four phases and nine zones of Vision360.

Emergence and leadership share a symbiotic relationship. Vision emerges from interactions between components and actors within the organizational system and requires leadership to be fulfilled. Leaders, in turn, provide opportunities for vision to break forth spontaneously. In the visionary leadership paradigm, leaders exercise agency through communication, often telling and selling a vision.

Typically, visionary leaders work alone or with their top management team (TMT) to search for and ultimately assemble a vision. This process often culminates with the creation of a vision statement. Sometimes, it does not—and that's okay. Vision creation functions as a culmination experience—not just a scheduled session—within the emergence process (Fig. 7.3).

The accretion principles introduced in Chap. 4 apply to the vision emergence process. On a total system level, vision accretion deals with how vision accumulates and becomes coherent over time using bits of data in the form of graphics, images, ideas, insights, and gleanings. On the one hand, isolated bits of data fail to provide the highest levels of knowledge. On the other hand, combining and refining different forms of data with individual and group wisdom can produce relevant insights for the future direction of an organization. In the conception phase, ideas about the future begin to stick together in a cohesive way. In the adoption phase, vision is infused with meaning through engaging internal and external stakeholders in a

5 Ground Rules of Emergent Visioning

1. **Vision should be "good enough."**
2. Brenda Zimmerman, an expert on complexity science, proposed this idea. Instead of working toward a perfect word-smithed vision statement, develop the vision enough to take action and experiment with it. Rather than pursuing perfection, work towards assembling a complete picture that reflects the perspectives of all stakeholder groups.
3. **Personal vision matters.**
4. Reflecting on individual vision in group settings helps team members and leaders avoid detachment, build commitment, and increase buy-in and ownership. Personal vision is the springboard for creating shared meaning and understanding within companies.
5. **No vision outweighs another.**
6. Historically, a visionary leader's big idea has carried more weight than any other future-thinking idea in a collective. For emergent visioning to work, leaders should level the playing field to ensure participants feel safe enough to share their true aspirations. Sometimes, they reveal their thoughts by first unpacking what they want less and more of in their daily experience. The negative visions (i.e., what they do not want to see) should be validated, as well as positive visions. It is also critical for them to feel comfortable sharing without fear of recourse. Lastly, the facilitator should convey to participants that power, status, and position are suspended while in this session. Individual perspectives carry equal weight and will be aggregated, not by job level, but according to specific methods and related criteria (e.g., thematic analysis).
7. **Vision is connected to reality, not limited by reality**. Conditions in the internal and external environment shape the realities organizational members face each day. A vision stifled by reality is a vision under the attack of antibodies deployed by the culture to preserve the status quo. Examining current situations using an appreciative approach reframes reality in a future-oriented way.
8. **Vision emerges in conversations and system interactions**. The containers for vision emergence (Exhibit 6.1) really come into play here. Organizational actors dialogue about the realities, time horizons, and constraints they face while seeking to perform their roles in a system of systems. In analyzing the way components of the system interact, stakeholders create solutions to initiate and accommodate future growth.

Fig. 7.3 Five ground rules of emergent visioning back-and-forth sense-making process. Here, the feedback collected is compared to the organization's initial strategic intent and turned into semi-formalized knowledge. In the creation phase, leaders pursue the formalization of a vision statement. In each of these phases, a vision emerges—first in the form of an initial vision that team members test out. Over time and with much refinement, that initial vision is condensed into a vision statement. If leaders rush the process or exclude stakeholder groups from the process, they will compromise its meaning. Such vision statements sound hollow and fail to resonate with team members and customers on an emotional level.

Summary

Vision is created. Vision emerges. Both statements are factual. Vision creation is not a linear path and a vision statement grows out of the emergence, conception, and adoption processes. During each process, stakeholder and systems interaction infuse the vision with a slightly different meaning. Without going through meaningful emergence activities, the vision statement will be a hollow, word smithed document. A team may formalize its emerging vision or volley the big idea between the creation and earlier phases of the Vision360 framework. Leaders work to figure out "how do we produce a formal statement while maintaining the fluidity of vision emergence?"

This chapter discussed the relationships between vision emergence and vision creation and delineated what emergence looks like. Using the containers for vision emergence, leaders can rewind to create a shared visioning experience without recreating a vision each time.

Here are the six takeaways and a dash extra.

- The idea that visions are assembled in a one-time exercise is a product of American business culture context. The visioning process is contextualized mainly from a Western worldview and married to the values of corporate America.
- In reality, vision breaks forth in unexpected ways emerging from the creative tension between future vision and current reality.
- Typically, visionary leaders work alone or with their top management team (TMT) to search for and ultimately assemble a vision. This process often culminates in the creation of a vision statement, but sometimes, it does not.
- Time and budgetary constraints cause a departure from the shared visioning ideal, and leaders often settle for less participatory methods. Organizations can end up with a good enough vision.
- Reimagining an organization's future using shared visioning methods can serve as an early intervention strategy to minimize disruption during transformational periods.
- Vision and strategy sessions are effective ways to ground the vision in both external and internal realities and awaken an organization to the need for transformation and change.
- Organizations engage in the vision creation process to formulate a collective vision. Shared visioning has salient benefits for organizations and links to high performance.

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Part III

Integrating the Vision into the Organization

If your organization has made it to this side of the model, you have created enough buy-in to avoid the Adoption Pit. Once a vision reaches the integration stage, it should not take team members by surprise. Ideally, stakeholders have co-created it, at some level, with company leaders *and* have bought into it along the way. Integration assumes followers have been involved in meaningful ways in the conceptualization, creation, and adoption phases. Often, leaders find that translating the vision into everyday employee behaviors is the missing link between development and realization. Implementation requires more than simply translating vision into strategy and action plans. The decisions followers make in their day-to-day experience reflect their level of acceptance of the new direction. Their beliefs also determine the type of actions taken.

Vision integration and emergence do intersect. Kohles et al. (2013) explored:

> Employees' perceptions of the bidirectional leader-follower processes that may facilitate or hinder vision integration over time among organizational members, recognizing there are both planned and spontaneous channels in which ideas are communicated and diffused throughout an organization. (p.468)

When leaders decide to embed vision into multiple layers of organizational life, they face two challenges. Kohles et al. (2012) proposed that vision makes a difference when leaders and followers successfully communicate it throughout the organization and institutionalize it as a guiding principle. In short, two critical success factors concerning a shared vision are (1) communication and (2) institutionalization.

Vision integration translates what Hines (2021) termed "big 'V' visioning" into "small 'v' visioning." Because vision integration represents a gap in the literature, I will take this time to explain what is known about the concept before delving into Chap. 8. Kohles et al. (2012) defined vision integration as "the extent to which followers perceive that they actually use the vision as a guiding framework to make sense of the uncertainties inherent in daily organizational life" (p.477). By shaping this perception in the early phases of vision development, leaders influence and increase stakeholders perceiving the utility of vision and avoid it appearing disconnected from their work. The hallmark of vision integration rests in considering organizational vision from the followers' perspective and what motivates them to embed vision into their behaviors to drive decision-making.

After reading the literature on this vital back-end process, it became clear that the vision integration stage carries several assumptions and implications. First, vision integration is the final bridge in connecting vision with reality. Second, integration can improve the practical use of vision. Third, the vision integration construct covers "behavioral movement in the direction of the vision" (Burke, 2018, p. 163). Fourth, integration depends partly on creating a vision-friendly context within the organization. Fifth, symbiotic processes and interactions between leaders and followers facilitate or hinder integration (Kohles et al., 2013). Finally, integration connects the acts of diffusing a new vision with tapping into team members' knowledge, skills, creativity, and other sources of power on the individual level (Kohles, 2001). Vision integration is the ultimate test and expression of self-organizing behavior. Vision integration tests the effectiveness of the balance between leader agency and emergence. Therefore, this section attempts to assemble research and best practices related to the integration phase according to the principles of the Vision360 model.

The translation of vision into forward-moving behaviors and principled decisions is largely missing in academic research (Kohles, 2001). In this part, visionary leaders and followers will explore the path to vision integration. Chapter 8 opens on the vision-culture battlefield and proposes strategies organizations can use to changes its status quo—the social and functional systems that make it tick. This chapter discusses popular leadership approaches and provides tips for leadership style modification. Chapter 9 will contextualize employee engagement and empowerment for vision integration. Furthermore, it will emphasize the need for employees to use vision as a guiding framework to navigate organizational realities, adopt new vision-enhancing behaviors, and make more intentional decisions. So, what happens when a vision is realized? Chapter 10 reconnects the four phases of Vision360 to the VUCA environment through vision iteration. This final chapter highlights the ongoing nature of vision emergence, development, and realization, using the March of Dimes as an example. As entrepreneurs and leaders realize their visions, new horizons emerge that inspire organizations to set new goals and sustain the velocity of vision iteration.

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Optimizing and Transforming Organizations

8

When the artist formerly known as "Prince" changed his stage name to an unpronounceable symbol, his decision sent shockwaves through his fanbase and the music community. Symbols can speak volumes, and a picture is worth a thousand words. The same is true for Vision→←Culture.

The "Vision→←Culture" Force Field

Remember, vision is a big idea. When the word "idea" is substituted for "vision," suddenly, this force field represents an ever-present dynamic in organizational life. Vision is also an innovation. The status quo is on *en garde* against any threat to the vision. This battle creates a palpable tension in the atmosphere. Sometimes, a visionary leader could feel like shouting, "Mayday!" as their big idea comes under siege. The tension can escalate to levels only felt during geo-political military conflicts, leaving an executive to wonder, "Why are my employees resisting the change vision so much?" (Fig. 8.1).

An emerging leader may wonder, "How could an employee ever see my vision as a threat?" This is where units of analysis and time orientation kick in. A new vision threatens the old vision and the infrastructure supporting it. The old vision has been integrated into an organization's present culture. It is the reality. Team members and leaders have formed routines that detect and defend against threats, as the immune system defends the human body. A new vision threatens to upend this reality and turn each misaligned routine on its head. Force fields can quickly turn into battlefields. Cultures become hostile to protect the status quo—especially if not unfrozen to the threat of immunity at the idea stage, as advised in earlier chapters. The vision is not a threat within itself; however, the change accompanying it can cause apprehension.

Therefore, this chapter comes with a disclaimer. Leaders be forewarned—if the "vision as a threat" counternarrative has not been handled before introducing a

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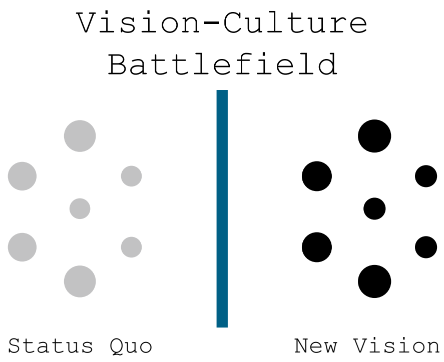

Fig. 8.1 Vision-culture battlefield

change initiative, the counternarrative will turn into the main narrative and barge through the noise to stand front and center. Leaders must optimize and transform the organization for vision emergence and integration. First, the leader needs to disarm the organizational culture, as it has been trained to protect the status quo from all threats, foreign and domestic.

How Cultures Develop in New Ventures

Vision and culture wars do not occur out of the blue. Understanding the origin of the conflict is essential to understanding the present dynamics, including how to move forward. I have witnessed die-hard followers risk their reputations and overall well-being for causes they believe in. So, by now, you may be asking, “Why does the culture protect the status quo at all costs?” The answer starts with wisdom passed down from an expert.

In over 50 years of studying organization development, organizational culture scholar Edgar Schein witnessed sweeping changes in the field. One thing that remained constant was the general cycle of culture formation. Citing the histories of Fortune 500 companies like Apple, Facebook, and Hewlett Packard, Schein (2017) noted a similar pathway to cultural evolution that ultimately led to organizational emergence. He proposed that company cultures emerge, evolve, and survive in the following ways:

1. A single entrepreneur or small group of founders wants to do something different and decides to start a business.
2. They iterate the product and business vision, changing their personal and professional lives to accommodate their desire to pursue this new direction.
3. Their business culture begins to emerge and evolve, but it survives if a) those changes produce collective success and b) the group adopts the leader’s vision and values (or if they build a shared vision).

4. Success depends on their ability to solve two problems: external adaptation and internal integration—the former ensures survival, and the latter increases coordination.
5. By adapting to the external environment and coordinating the internal organization, the visionary-turned-leader creates the status quo, better known as "the way we do things around here."
6. The status quo becomes the company culture, helping the visionary organization achieve adaptation and integration.
7. Eventually, changes in the external environment threaten "the way we do things around here" and reveal the company's vulnerabilities.

Remember, leaders and joiners created the status quo by examining the external and internal environments and devising best practices. So, when the variables in that equation change, the organization must adapt to accommodate the new situation. VUCA has amplified the intricacies of this high-level and somewhat oversimplified summary of the life cycle of organizational culture by orders of magnitude.

Organizational Health: Insights from Immunology

The work of innovation expert and professor Gary Oster explored a connection between immunology and organizational health through discourses on innovation antibodies.[1] Oster's work drew a parallel between the human and corporate bodies. The counter-narrative of this book builds on this concept by extending the analogy between the body of an individual human and the collective body of an organization.

Counternarrative: The War Between Vision and Culture

Any vision, change, and strategy derived outside of a shared process will meet significant resistance from at least one group of stakeholders. Their culture will view the new thing as a foreign substance or an antigen. When a vision is imposed on an entire organization, the vision-culture force field turns into a full-fledged battlefield. The culture declares, "Game on!" and the organization unleashes antibodies. These defenders of "the way things are around here" have but one job—to find creative, innovative, and visionary ideas and to stop them before they start to disrupt the status quo.

This section may sound dire, but the warning is intended to benefit leaders at various stages of the vision journey. If you are a founder who has decided to pivot without sufficiently consulting your team, the culture you established will likely

[1] Oster's scholarly contribution furthered the concept of organizational antibodies introduced by Tony Davila, Marc Epstein, and Robert Shelton in *Making Innovation Work: How to Manage It, Measure It, and Profit from It*.

resist that decision. They will not pull away because it's wrong, but because they view the strategic change as an intruder. It views the pivot as a threat. Suppose you are a professional CEO brought in by the board of directors to replace the founder. In that case, the culture is unleashing antibodies to protect a status quo that you did not establish—one that may be out to destroy your mission for the organization. Imagine you have just cast a new vision within an established business without adequate input from your organization. Your company's culture is likely unleashing antibodies to protect the status quo—whatever that may be. Enough doom and gloom—let us move on to the solutions.

Mapping the Vision→←Culture Force Field

Culture is to an old vision what vision emergence is to a new vision. Culture protects the status quo, while vision emergence protects a big, innovative idea. Chapter 7 implied vision emergence as an alternative to imposing a vision on an organization. It also listed over 25 containers where vision is most likely to break forth in spontaneous interactions and exchanges within the complex system called an organization. Vision emergence acts like a biologic, suppressing the pre-programmed autoimmune response that cultures develop to fend off that threaten the status quo.

This chapter integrates the container and antibody concepts. The containers for vision emergence can also house positive and negative antibodies. The positive antibodies reinforce the new vision, and the negative antibodies seek to change the status quo. If the culture deploys a negative antibody that threatens the organization's future survival, the new vision will use positive antibodies to neutralize the threat. Similarly, suppose the existing culture deploys a positive antibody to preserve the status quo at all costs. In that case, the new vision will deploy a negative antibody to prevent the culture from strengthening its defense of the status quo. The names of various organizational activities previously listed as vision emergence containers will appear as organizational antibodies, antidotes, and interventions in this chapter. How they are used will depend on what they are used for. For example, strategy is a high-level concept that is neither positive nor negative. However, Peter Drucker proposed that culture eats strategy for breakfast. The implication that culture can easily overpower the best-laid strategic plans changes one's perspective on the relationship between these two otherwise high-level concepts. Suddenly, visual learners may begin to imagine a battlefield or at least a force field. In the force field analogy, change is caught between the culture's restraining forces and the driving forces of strategy. The success of this change initiative will depend on the strength of the drivers and the restraining forces. In Drucker's analogy, culture wins. Figure 8.2 consults vision—the ancestor of strategy—and shows what happens behind the scenes.

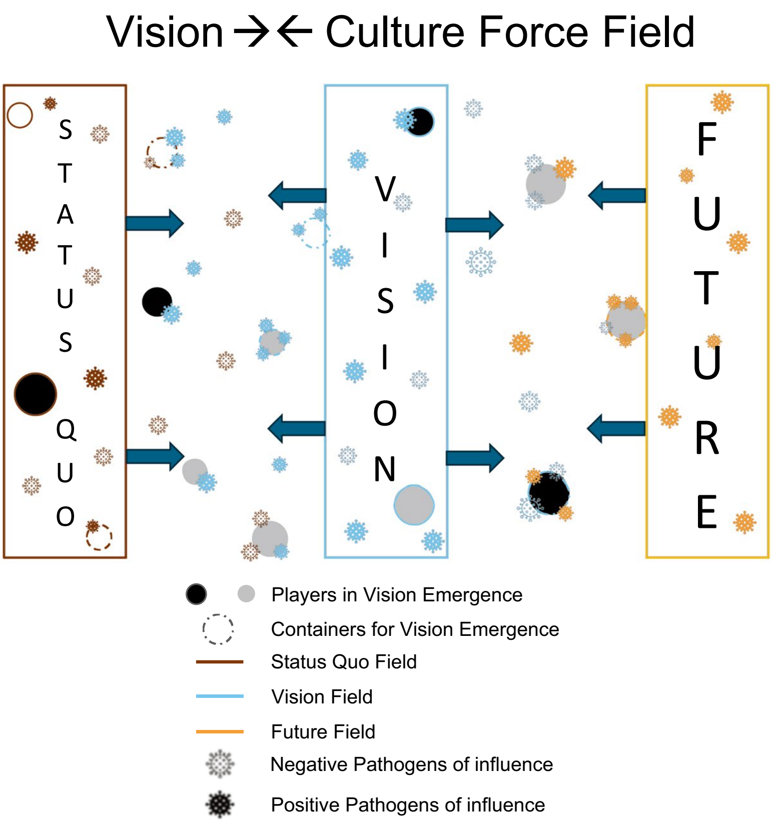

Fig. 8.2 Vision→←culture force field

Positive and Negative Antibodies

Senior managers design reward systems to prevent employees from deviating from the norm. Blockbuster employed this strategy with their customers and lost out in the long run. Blockbuster's business model revolved around customer forgetfulness, resulting in excessive late fees. Innovation expert Michael Schrage proposed a quick, inexpensive, low-risk experiment to learn about customer behaviors. He quickly discovered senior leaders did not want to learn about customer behaviors; they just wanted the problem to disappear without changing their profitable business model (Schrage, 2016). The culture of Blockbuster was positioned against two core values of many twenty-first-century companies: learning and customer-centricity. Instead of employing future-focused growth strategies, leaders doubled down on what had always worked, even though the business landscape was trending differently.

Organizational antibodies can be assigned to do different tasks. Some antibodies are explicitly assigned to block new innovations. The use of defensive routines is an age-old negative antibody deployed by the culture. It usually sounds like this: "But we've always done it that way!" Other antibodies are assigned to stop changes. Vision is an innovative idea that incites change. As a result, the culture assigns a set of positive antibodies to a formalized vision. These antibodies have one job: to protect the formalized vision at all costs. The organization has spent countless hours figuring out how to make this vision work. It's not about to replace it without a hard-won battle. A new vision also has positive organizational antibodies assigned to protect it. Because it is untested, a new vision has less antibodies assigned. Often, when a leader shares a vision by telling, they will assign the risk of job security to protect the vision. This sounds like, "either you get behind this idea or you can seek employment elsewhere." Such behavior is so ingrained in corporate life, as soon as people detect the possibility of sweeping changes, they begin to wonder about their job security. Vision is associated with change, and so are layoffs. Negative associations can function as positive or negative antibodies, depending on the context.

Not all innovation antibodies need to be *neutralized*. Oster (2009) challenged organizational leaders to take responsibility for organizational health by "neutralizing negative innovation antibodies and focusing the energy of positive innovation antibodies onto efforts that inform and propel progress with the corporation" (p.656). In other words, leaders should neutralize negative antibodies and mobilize positive ones. Canceling out negative antibodies should not drive leaders to build a "cancel culture" within the organization. Nor does neutralizing antibodies mean leaders should silence dissenters or eliminate opposition. Figure 8.2 maps the way a new vision and existing culture deploy positive and negative antibodies against each other. The culture is protecting the status quo, and the vision is determined to sustain the organization into the future. At a fundamental level, supporters of both sides want the same thing—even if they cannot see it yet.

People are not antibodies. In immunology terms, antibodies are proteins. In organizational terms, antibodies are assumptions, mentalities, ways of thinking, and ways of acting that come against an undesired result. In Oster's example, this result was innovation. In the context of this book, antibodies come against new vision. People are not the source of the antibodies—culture is. As visionaries forge new cultures around their emerging vision, a culture will emerge. This culture will start out small, but it will be able to produce positive and negative antibodies. It's target? It depends on what side of the equation is being considered. There is a side that is pro-status quo. There is another side that is anti-status quo. Antibodies from the pro-status quo side will target innovation, vision, and change. Antibodies from the anti-status quo side will target defensive routines, culture carriers, and innovation blockers (see Chap. 9). Before mobilizing positive antibodies, seek feedback. Listening leaders stand a greater chance of correctly targeting the negative antibodies to neutralize and positive antibodies to mobilize. Leaders can use sound judgment to navigate the gray area between positive and negative antibodies.

The status quo is quietly draining the life of the organization. People are not antibodies, but they can transmit and respond to them once the culture releases them.

The Need for Transformation

Ice turns to water when its temperature exceeds the melting point. Water turns to steam when it reaches its boiling point. It endures a phase change when it reaches an inflection point. The same happens in biology. For example, a caterpillar turns into a butterfly after metamorphosis. Once it enters the chrysalis, it reaches the point of no return. When the climate and organization heat up due to vision-culture conflicts, the conditions likely signal a needed transformation. The organization has to become something new.

Chapter 5 discussed the need to encode the whole into parts as a principle of holographic organization. In a similar fashion, a vision must be diffused to every inch of the organization to be sustainable. However, the culture will be at war with a new vision until the leader decides enough is enough. At this point, a leader is more apt to identify and resolve the underlying conflicts between the culture and vision. People know change is coming, but what needs to happen is bigger than change. The old way will not work anymore, and the organization will meet an untimely demise unless it continues its current path. The new way meets resistance and hostility at every turn. The only way forward is for the organization to transform. This is a good time to introduce the principle of this chapter.

Principle 9:
Leaders diffuse a vision through an organization's culture and systems, initiating the transformation necessary for effective vision integration.

If company culture is the first thing to take a vision down, then it must be the target of transformation. Think about it. One would be hard-pressed to find an organizational function that fights a new vision more ferociously than an organization's culture. Culture guards the status quo. A new vision protects the organization's longevity. A company needs both to survive. Every organization reaches a period where the status quo, while comfortable, will lead to certain death. The vision attempts to redirect the organization to sustain and perpetuate its existence. The culture romanticizes the past while singing a chorus of Barbara Streisand's 1973 hit song, *The Way We Were.*

Culture Transformation

As organizations mature, leaders face the internal challenge of shaping a culture to instill new ways of doing things. Countless definitions exist for culture, but Edgar Schein provides the most integrative definition, saying:

> the culture of a group can be defined as the accumulated shared learning of that group as it solves its problems of external adaptation and internal integration; which has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, feel, and behave in relation to those problems….This accumulated learning is a pattern of systems of beliefs, values, and behavioral norms that come to be taken for granted as basic assumptions and eventually drop out of awareness. (Schein, 2017)

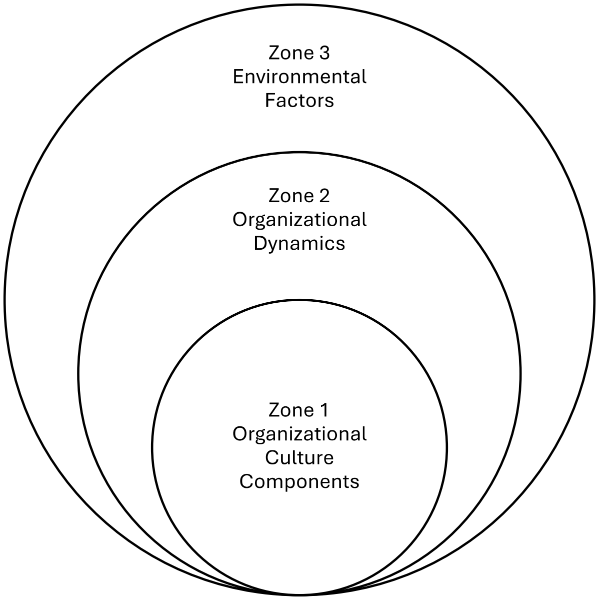

Fig. 8.3 Framework for culture development

As architects of human and social systems, chief executives possess specialized knowledge of how to integrate the various actors and components of culture to capitalize on opportunities in the business environment. Leadership teams assess, manage, and measure culture to ensure the organization remains healthy without the interference of toxic byproducts that hinder growth. Specific cultural development, evolution, and change vary according to a company's life stage.

The following section lays out three zones of culture as described by Schein (2017) to include organizational culture components, organizational dynamics, and environmental factors (Fig. 8.3). *Organizational culture components* include *c*ultural artifacts such as office layouts, rewards, and ceremonies that are visible to the observer. Such components represent deeper values, beliefs, and assumptions that are invisible. The "taken for granted" cultural values shape communication patterns and the way decisions are made. Culture clashes often occur during mergers and acquisitions, where the invisible culture components begin to surface. *Organizational dynamics* include micro-cultural subunits or subcultures such as functional departments, product groups, hierarchical levels, and teams. Culture clashes often occur between these subunits. Company founders shape culture from the company's inception. Executive leaders are the carriers of culture and managers are the guardians of their respective subculture (Schein, 2017). E*nvironmental factors* occur outside of the culture but do affect the organization and its inner workings. These factors shape the way a company pursues its vision, deals with customers, and engages with competitors. Components of macro-culture include national culture, industry cultures, occupational cultures, regional cultures, and gender-based cultures. National culture affects organizational culture components when companies expand globally.

Culture Formation at Zappos

Culture and values bridge the gap between vision conception and integration. A firm's long-term, or terminal, values connect the preferred future with day-to-day employee behaviors using its short-term, or instrumental, values. This process requires leadership teams to intentionally design the company's culture and values to align employee behavior with its future direction. For example, former Zappos.com CEO Tony Hsieh chose the terminal value of customer and employee happiness over top sales performance for his internet shoe retailer (Daft, 2011). Tapping into his sense of instrumental values, he outfitted his company with a nap room, full-time life coach, happy hours, and pajama parties. Managers cultivated a relaxed atmosphere, spending 10–20% of their time having fun and goofing around with their team members. The point was to encourage employees to show their unique personalities at work. Employees understood the leadership team expected them to "wow" the customers. Managers gave them the full autonomy to knock their socks off. The alignment of vision and success through long- and short-term values, along with manager and employee behavior, helped Zappos increase sales and profits at a more rapid pace than most companies. Due to its unique approach to culture, Zappos has received multiple accolades, including landing in the top 25 of *Fortune's* Best Companies to Work For.

Cultures Reject and Accept Leaders

How can a company oust a founder only to reinstate them years later after the company loses its way? Consider Apple's co-founder and two-time CEO, Steve Jobs. Apple ousted him in 1985 and went to the brink of bankruptcy before returning to its roots and reinstating Jobs in 1997. A decade later, Apple cornered the smartphone market with the iPhone and made history in 2018, becoming the first publicly traded company to reach a market capitalization of $1 trillion. Jobs' legacy of innovation outlasted his tenure as the iPhone and countless Apple products have changed the global communication culture. Steve Jobs built a company that changed how people interact with technology, information, and each other. Apple's story would be different if he had not been reinstated as CEO.

Steve Jobs demonstrated superior knowledge of how to turn Apple around because it was his brainchild. One could even argue that what he accomplished for people around the globe was his destiny. Similarly, a founder who translates an idea into a tangible product has unparalleled knowledge of their brainchild. This includes product, operations, and culture. The founder projects their assumptions onto the organization, and the culture tests those assumptions while adapting and responding to external pressures. The culture that the leader once shaped begins to determine what leadership is acceptable for each successive growth stage (Schein, 2017). Some founders cannot merge professional CEO qualities into their entrepreneurial style, and the company can suffer. Others, like Jobs, take a second loop and return to their brainchild in a second act and after starting other ventures.

Reward Systems at Cisco
After the dot-com bubble burst, Cisco entered a fight for its life. Leaders found it necessary to overhaul the independent cowboy culture in response to a need for "stronger collaboration and a faster response to shifting technology needs" (Daft, 2011, p. 431). As a result, Cisco implemented a new rewards system that rewarded executives for total-system performance, not individual performance. Core values of trust and openness replaced the embedded values associated with the command-and-control leadership style. Although the transformation led to increased sharing of knowledge, ideas, and resources, 20% of Cisco's executives departed because of an inability or unwillingness to adopt the new values.

Culture Integration During Mergers, Acquisitions, and Joint Ventures

Mergers and acquisitions are a unique type of organizational change employed by organizations. While M&A has become common over the last decade, not all initiatives succeed. Fred and Forest David listed the difficulty in integrating different company cultures as one of the nine reasons many mergers and acquisitions fail (David & David, 2015). This is partly due to a discrepancy in how the change initiative is treated. At one extreme, the MBA perspective regards M&A as purely transactional. When treated this way, culture clashes and conflicting values negatively impact the project. At the other extreme, the organization development view laments the need for culture transformation. To make the business case, cultural integration is a form of risk management. It helps investors, leaders, and general stakeholders avoid the risk and expensive dangers of culture clashes. This middle ground increases the success of M&A activity. Unfortunately, culture integration is often an afterthought during mergers and acquisitions, if integration teams consider it at all.

People resist change. Employees and managers may not see a need to change their routines. In their minds, they may lack what it takes to meet the requirements necessary to change. They may also be in doubt, asking, "Does the organization have what it takes to make the change stick?" This is where leader agency and emergence combine and kick a leader into orchestration mode to create psychologically safe spaces for team members to share their feedback—their dissenting views. Terminating these employees or pushing them out is counterproductive. It just causes valuable employees to walk out of the door, taking their knowledge and the organization's human capital investment for the competitor to reap the benefit. Most employees are not trying to be difficult (I'm sure you can think of those who are—but most are not). When facing resistance, remember this: employees resist changes they did not help create.

Team members resist changes they did not help create.

In the case of M&A, culture clashes surface in the form of conflicting values. Incompatible cultures represent a noteworthy obstacle to successful mergers and acquisitions.

Analyzing Culture

Competing values will contend with each other in the vision-culture force field for those who will gain control of the company. Analyzing an organization's culture will make these forces less obscure and more manageable. With over 70 culture assessments, analyzing culture can be daunting. Tools like the Competing Values Framework and the Organizational Culture Assessment Instrument by Kim Cameron and Robert Quinn help leaders and consultants connect the dots and seek clarity about how components of the organization's culture drive it toward or steer it away from the vision. An external consultant can help leaders clarify why they think culture change is necessary and the level to which it needs to be changed. Culture and values can involve dormant emotions. Culture assessment tools give leaders and teams the language to talk about invisible parts of the organization and their personal values. A trained facilitator can provide an outside perspective and make it easier to unpack the pain points through assessment and culture change. For more information on the OCAI culture evaluation process, refer to *Diagnosing and Changing Organizational Culture: Based on the Competing Values Framework* by Kim Cameron and Robert Quinn or visit OCAI Online for immediate resources.

Case Example: Culture Integration and the Role of National Culture

Cultural norms emerge to mitigate anxiety and uncertainty imposed on the organization by its environment. New cultures face novel challenges that require creating a new way of doing things. In a Canadian-Italian joint venture, Italian employees systematically and intentionally ignored memos containing important operational instructions from the Canadian parent company (Schein, 2009). The action was intentional, not malicious, but the Italian employees believed that "anything of importance should and would be *personally* communicated" (Schein, 2009, p. 190). Employees perceived the memos as insulting—an emotional response—and rationalized them as unimportant. This example illustrates how differences in national cultural norms can affect business operations. The clashing communication cultures between Italian employees and Canadian managers negatively impacted organizational performance. A gap in the perception of communication channels caused conflict between the Canadian parent company and the organizational subculture of the Italian workforce. The difference in occupational norms also skewed both groups' perceptions of the memos.

Cultural Incongruence

As companies mature, coordinating all operations becomes less efficient for the founder. Smaller units begin forming their unique way of doing things. CEOs and senior management teams bridge the gap between the need for the organization to adapt to the external environment and the need for integration between the people and systems of the organization. Leaders begin to form subcultures within their departments and teams. Some subcultures will mirror the overall company culture more closely than others. Other groups will develop unique operating systems in response to the occupations and preferences imported from employees' national cultures, products and services, and hierarchical levels. Assessments help leaders redesign the culture after analyzing results from the subculture(s) in question and overall company culture. In some cases, cultural incongruence may be tolerated or even embraced. According to (Cameron & Quinn, 2011), incongruence between a subculture and the central culture could benefit firms in certain situations.

Case Example: Meta and WhatsApp Avoided a Culture Clash
The emergent culture of newly formed startups is primarily shaped by its founders and managers, who display the values and behaviors the founding members espouse. It is important to uncover the founder's underlying beliefs that have shaped the culture. This becomes paramount during acquisitions. For example, Meta Platforms has acquired several entrepreneurial small businesses in the past decade. Along with acquiring WhatsApp, Meta inherited the startup's core value of focus and concentrated effort. This value manifests through quiet spaces and the "simple, utilitarian" nature of its app. WhatsApp's values originated with the preferences of its CEO, Jan Koum, and the needs of the company's engineers, who quip that they are slightly older and crankier than the typical college student (McCracken, 2017). Integration teams should unpack cultural realities when considering a merger or acquisition. Culture consists of more than the face value of an employee. It is a sum of its parts, including values, rituals, ceremonies, stories, symbols, beliefs, and assumptions. In unpacking the cultural reality, executives should assess the strengths and weaknesses of the current culture along with underlying assumptions driving employee behavior. Such an analysis will reveal which cultural components will pull toward and against the preferred future direction.

The Diffusion of Development

Development is the primary way leaders and managers transform resistance into readiness. According to the holographic reproduction model, which encodes the whole into each part, a new vision must be diffused throughout an organization's system. Coaching is one example of a development activity. For decades, coaches and leaders have partnered to embed coaching behaviors into organizational cultures, and the term "coaching culture" has emerged.

Once conceived and assembled, a vision begins to be adopted and integrated into the organization. Observations of how vision works reveal that simply diffusing it throughout the organization will not ensure its adoption. Getting the vision accepted in increasingly relevant ways for stakeholders takes time and extra effort. Most vision-related literature focuses on leaders or top management teams as the originator, representative, and primary implementer of an organization's vision. As a result, it largely ignores the complex processes involved in diffusing any new idea throughout an organization, no matter how conventional. (Kohles et al., 2013, p. 467).

Leaders must diffuse development activity throughout the organization for a company's systems and culture to progressively accept an innovative conception of the future. At this point in the integration process, the development activity—initially designated for furthering the vision—now expands and transfers to all facets of the organization.

Top leaders diffuse a vision through an organization's culture and systems, initiating the transformation necessary for effective vision integration and tailoring the organization's systems to accommodate vision development. They also develop the workers and managers who will carry out the vision. Because many factors are unknown at the beginning of their journey, startups are responsible for developing and achieving a fit between customers, markets, and products (i.e., business, market, and customer development).

Kohles et al. (2013) proposed that social change is the primary goal of the visioning process. As a type of social change, the vision calls for leaders to alter the structures and functions of the organization's social system (Rogers, 2003). This alteration often happens through various means, including repeated communication and reinforcement using such levers as socialization and compensation (Sosik & Jung, 2018). Vision, self-organization, and development must be diffused throughout the organization for the preferred future to be accepted and integrated.

At a high level, three things must be diffused throughout contemporary organizations to remain competitive: vision, emergence, and development. As discussed in the previous chapter, strategy represents one way to diffuse the pursuit of preferred futures throughout an organization, but there are countless others. The following disciplines represent this diffusion of development: research and development, product development, business development, strategy development, organization development, learning and development, talent development, and leadership development. With each term placed end-to-end, the repetition becomes impossible to overlook.

Three Types of Development

Research links infant vision development to overall human development, including attaining social-emotional and cognitive milestones (Steele, 2010). It stands to reason that similar principles apply to individual people as well as to a collection of people, albeit in a more complex way. Multi-disciplinary development activities (i.e., processes and systems associated with transforming the organization and its members) must be dispersed to transform the organization and its leaders, managers, and team members into vision developers and iterators. Steele (2010) proposed that development is "an ongoing process that uses past and present information to accomplish current or future activity" (p.155). The term is "often defined as a measure of ability to perform a certain task, correlated with age….and most often determined after the ability has been observed" (Steele, p. 155). He also argued against myopically viewing development as a measurement against a norm, which implies a push "to get up to speed," but as a dynamic, ongoing process (Steele, p. 155). The learning inherent in development requires the space to make mistakes and correct them in an environment characterized by psychological safety (Edmondson, 1999, 2018). As to collective life, such diffusion requires intentionality to continue beyond vision and strategy formulation.

Transformation and change require leaders to play the long game with a developmental approach. This chapter proposes ways to diffuse growth and transformation throughout organizational life to convert the vision into reality through intentional effort and coordinated action. These three areas include the development of ventures and organizations, people, leadership, and culture. This list is by no means exhaustive. Instead, it provides categories in which development happens in organizations. This chapter also explains the need to optimize organizations for continued vision emergence and prepare for individual-level vision integration. The growth of ventures, people, and organizations is critical to accommodating vision development and realization.

When a new vision is introduced, existing businesses transform, but startups emerge.

Venture and Organization Development

Most of the existing literature on vision was contextualized for existing businesses. However, according to Blank and Dorf (2020), startups do not operate like traditional businesses. If new ventures do not function like existing businesses, a startup vision does not work the same as the vision statement of an established company.

Venture Development

Vision is critical to initiating a new venture, and venture development is emerging as a leading topic in transforming the vision for a startup, first into reality, and then into a profitable and scalable business. A startup's context is different from that of an established organization. Entrepreneurs and investors of new ventures work to develop an organization where none exists. Complexity increases by orders of magnitude. Until it achieves product-market fit, a new venture is incredibly vulnerable to the volatile and complex environment surrounding it. Hence, startups engage in venture-specific activities such as customer, market, and business development on the one hand and rapid prototyping, experimentation, and product development on the other. In existing organizations, the status quo is "the way things are done around here." The status quo in a nascent venture often exists as disparate ideas and potential components in desperate need of assembly. This chaotic condition is the polar opposite of organization. In complex systems, organization is not imposed onto chaos; organization emerges from chaos. Chapter 6 covers special topics on venture development.

Before the startup phase, a company exists only in the entrepreneur's mind and with those with whom they share their vision. At an appropriate time, the entrepreneur transforms their dream into a tangible and measurable business. Organization development, transformation, innovation, and change generally become more prominent at later stages.

Organization Development

Change is an essential consideration when a vision is introduced in an established organization and would upset the status quo. Organization development, transformation, and change are contextualized for larger, established businesses instead of startups. Organization development takes a human-focused approach to transform existing culture, structures, and processes. Although scientists are teaching machines to “see” using artificial intelligence (AI), collective visioning is a characteristically human activity. Organization development, or OD, approaches vision development from a human-centered perspective. OD supports integrating the vision into the organization by intervening in the organization’s systems to transform culture, develop structures to support change and maximize organizational effectiveness and performance. Executives and managers who build competence in organization development, transformation, and change theory can see their visions realized and missions effectively serve their stakeholders (Rothwell et al., 2016). Vision invokes the need for transformation; organizational transformation requires development.

The Evolution of Organizational Structure

Because the telling shared vision strategy of big ideas depends on a vertical chain of command to succeed, an absence of a command-and-control culture will likely derail top-down visioning. Command-and-control leadership approaches work better under more stable conditions than the current VUCA environment allows. This disclaimer aligns with the principle of requisite variety that proposes all of an organization’s components should reflect the dimension of its environment to self-organize and cope with likely demands placed on it. Top-down visioning may fail in networked and decentralized organizations (Kantabutra, 2008). Properly diffusing vision through an organization requires rethinking management principles where top-down approaches coexist with emergent practices.

Borrowing from a concept introduced by Husband (2013), a shared vision emerges from “wirearchy,” not hierarchy. Due to their temporary nature, startups and entrepreneurial ventures hold untapped insights for experimenting with organizational design (Burton & Obel, 2018), particularly in self-organizing systems. The business environment has become increasingly networked. The decentralization of organizations has created a more pressing need for companies to develop a shared vision that motivates stakeholders to pursue a new direction, coordinates efforts to achieve the company’s goals, and anchors planned change initiatives (Haque et al., 2020). Changing the design of work processes, jobs, and organizational structure is necessary to adopt and integrate a new vision.

People Development

Many leaders ask, “What if I develop a follower only for them to quit?” In this case, the long-term creation of a company culture known for developing people mitigates the short-term loss of a handful of employees. This way of thinking mirrors a job hunter’s mentality when updating their resume and describing professional experiences gained over their career. No one can take their expertise from them. Leaders who develop followers can not only claim this skill set; they also have the power to embed follower development into their organization's culture to the degree that their firm becomes known for developing its people. If the organization fails to invest in developing its employees, managers, and leaders, it will lack the proper knowledge and capabilities to enact the vision. To perpetuate growth, visionary organizations increase people development efforts as the firm expands.

Leadership Development

Vision is central to leadership. It inspires team members to take action. Leadership is critical to realizing a collective vision. To better understand the relationship, it is necessary to dispel three myths.

Three Common Leadership Myths

Myth 1: Leadership is a Person

In a conversation with a colleague about the importance of leadership effectiveness in the VUCA context, the topic of avoiding the "common sense" delusion of leadership came up. Executive advisor Liz Wiseman illustrated the radical difference in today's leadership practices, as contrasted with the more "common-sense" approaches of the 1990s, drawing the following comparison: In the 1990s, leaders had a vision that they knew well and would guide the organization toward that ideal future. However, navigating times of uncertainty is like leading a team in the dark—with a flashlight. The leader may not know the exact path that leads to the destination, but they know that the organization will not survive if it remains in its present position (AceUp, 2020). Turbulence has escalated in the business context, causing more leaders and organizations to test the traditional limits of leadership and followership.

Countless definitions exist for the term "leadership." With one of the most succinct definitions, Northouse (2016) defined leadership as "a process whereby an individual influences a group of individuals to achieve a common goal" (p.6). Conversely, Winston and Patterson (2006) painted a clear picture of leadership and how it works by analyzing over 160 sources to synthesize a 695-word integrated definition. Both definitions imply that "leader" and "leadership" have different meanings. A leader is an agent who influences a group to pursue and attain a desired and collective future state. The system and the associated act of leadership help leaders and groups shape and realize their preferred future.

Myth 2: Leadership Development Focuses on Individual Leaders

Along the same train of thought and contrary to popular belief, leadership and leader development are not the same. On the one hand, *leader* development concerns cultivating human capital and individual capabilities (e.g., self-awareness, self-regulation, and self-motivation) that produce intrapersonal competence (Day, 2000). Leader development is founded on:

> A traditional, individualistic conceptualization of leadership. The underlying assumption is that more effective leadership occurs through the development of individual leaders…. [and] leadership is something that can be added to organizations to improve social and operational effectiveness. (Day, p. 605)

On the other hand, *leadership* development concerns building social capital upon the foundation of interpersonal competence, emphasizing "the development of reciprocal obligations and commitments built on a foundation of mutual trust and respect" (Day, p. 605). Leadership development originates in a relational model of leadership that assumes "leadership is a function of the social resources that are embedded in relationships…[and] an emergent property of social systems" rather than an add-on to existing systems (Day, p. 605). An organization should not choose one approach over the other. It should "link leader development with leadership development such that the development of leadership transcends but does not replace the development of individual leaders" (Day, p. 605). Leadership development links to shared visioning by creating collective meaning, shared representations, and social capital.

Myth 3: Leaders Are Invincible

Infallibility and omniscience represent two qualities often misattributed to leaders. Followers view infallible leaders as incapable of making mistakes. If unable to correct the misconception, leaders surround themselves with intricate defenses intended to save face. Omniscient leaders are regarded as all-seeing and all-knowing. Leaders indeed make mistakes, and a founder's purview is limited. Familiar leadership paradigms provide solutions, but leading through VUCA conditions initially generates more questions than immediate answers.

Why does this matter? If leaders admit their mistakes and commit to learning from them, followers are free to admit to their own mistakes and even get coaching from their leaders on correcting them. Similarly, if leaders acknowledge the impossibility of seeing and knowing everything, they are free to tap into collective intelligence and foresight. By recognizing the limits of their vision, knowledge, and capabilities, leaders make room for team members' strengths.

Limits are different from weaknesses. A person's strengths come with a corresponding set of drawbacks and form natural boundaries on what they can do in the 24 hours available daily. For example, an extroverted business development representative may never be able (or possess a desire) to augment their technical data analysis skills without upending their entire professional life. Their strength lies in their ability to forge and maintain relationships with people, not using complex formulas to crunch data. The ability to recognize this limitation frees them up to detect an opportunity to build relationships with quants, explain the type of data they need, and tell a story to current and prospective clients to address an unmet need. This process begins with leaders admitting, first to themselves and then to their team members, that they are not omniscient and inviting team members to share their unique perspectives and knowledge. Achieving this level of self-awareness can be more complicated than it sounds for a visionary leader who doubles as a founder-CEO.

On Leadership Styles and Approaches

Because visioning is a part of various leadership and organizational approaches, the Vision360 model overlaps with other conceptual and theoretical frameworks. Multiple leadership approaches and styles involve vision at varying degrees, including strategic, transformational, visionary, and vision-based leadership. In new companies, the founder-CEO typically leads with an entrepreneurial style. Although most leadership theory books avoid mentioning this specific style, the entrepreneurial style is valid. This entrepreneurial style works for a while, but the founder always runs into the problem of augmenting their style to match the new capabilities required of what would seem like a professional executive once the organization grows. This is the context of leadership in a startup. So, any style the entrepreneur adopts would complement and supplement their natural approach to leadership. "What makes leaders effective in mobilizing and motivating followers [and] what makes individuals in leadership positions successful in influencing others to pursue collective objectives?" are two critical questions leadership research seeks to answer (Van Knippenberg & Stam, 2014, p. 242) . Considering that leadership studies are designed to address practical organizational issues, both questions point to an answer that one can observe in many effective organizations. A leader should modify their style based on followers' needs and preferences and influence followers in the right direction and in the right way (Table 8.1).

Approaches for Leader Agency

The study of leadership is rooted in the command-and-control approach of "great man theory." This is the wear pattern of the leadership discipline. This section will share several leadership approaches directly related to the Vision360 model and explain how leadership approaches relate to Vision360.

Vision 360 is not a leadership style but a mental model that leaders can adopt to refine their approach to leading individuals, teams, and organizations. *Transformational leadership* (Bass, 1995; Burns, 1978) spans multiple phases of the Vision360 model. The emphasis placed on vision in business literature originated from charismatic-transformational leadership theory, which spans the last

Table 8.1 Tips for leadership style modification

There are many ways to approach leadership style modification. Here are three tips.
First, be confident in your natural style. Learn more about its strengths, weaknesses, and limitations. Lean into the strengths and look for others proficient in skillsets where you face constraints. There are countless official and unofficial leadership styles.
Second, recognize that vision links to multiple leadership and organizational approaches. It is not limited to the visionary leadership style. Regardless of your natural style, you can integrate vision into your leadership approach. You can be an authentic leader who uses vision. You can be a servant leader who develops followers to enact a vision for the organization and their personal lives. Because it appears in much of the organizational and strategic direction literature, vision has become a given or a prerequisite for optimizing one's influence as a leader.
Third, recognize the scope and context of your vision. This idea harkens back to the scope of vision concept from Chap. 2. Big "V" visioning contexts include independent startups and corporate ventures where the primary aim is organizational emergence and existing entities where change leaders aim for organization development and transformation. Small "v" visioning contexts include functional departments, work teams, and project teams where the vision-related leadership within a smaller entity significantly impacts the whole company's future.

three stages of the Vision360 model. Big "V" visioning is associated with transformational leadership and change. Small "v" visioning is associated with change management. Full Range Leadership Development, or FRLD (Sosik & Jung, 2018), provides a mental model for transforming followers into leaders—a tenet of transformational leadership. Leaders use the associated skills to empower followers to enact the vision, thus sustaining commitment (Nanus, 1992). A limitation of the transformational leadership approach and its associated Full Range Leadership Development model is that it fails to account for the early involvement of followers in vision development, which makes a difference in the buy-in needed for successful vision adoption. In essence, this approach still holds visioning as an action taken by a lone visionary or a small cadre of top managers.

Visionary leadership (Bennis & Nanus, 1985; Nanus, 1992) is the most prevalent vision-related theory and functions as a subset of transformational leadership. Visionary leaders develop a personal vision, work with their colleagues to create meaning and purpose through a shared vision and communicate their vision to inspire followers to act (Taylor et al., 2014). This leadership approach "creates high levels of cohesion, commitment, trust, motivation, and enhanced performance" in new organizations (Taylor et al., p. 568). Visionary leadership coincides with vision creation and the communication subphase of vision adoption.

Vision-based leadership is a more nuanced process a leader or manager takes to turn vision into reality while managing external and internal resistance. Vision attributes, content, realization factors, and themes are considered along with leader, follower, organizational, and external factors to determine their impact on performance outcomes such as employee and customer satisfaction. Vision-based leadership covers the vision creation and adoption phases and alludes to components of the integration stage. *Organizational vision integration* (Kohles, 2001; Kohles et al., 2012, 2013; Slåtten et al., 2021) concerns strategically aligning vision with employee work behaviors and decision-making. Compared with the more comprehensive approach offered by vision-based leadership, visionary leadership takes more of a reductionist approach, focusing on vision communication.

Several leadership and organizational approaches coincide with vision development. For example, the study of strategic leadership began as a study of chief executives and their top management teams (Finkelstein et al., 2009); however, the concept has expanded since its inception. *Strategic leadership* is defined as a person's ability to demonstrate six capabilities, including anticipating the future (i.e., foresight), envisioning the future (i.e., vision creation), maintaining flexibility (i.e., agility), thinking strategically, collaborating with other stakeholders to initiate changes, which creates a competitive advantage for the organization in the future (Daft, 2011; Ireland & Hitt, 2005). It should be noted that Ireland and Hitt's (2005) definition of strategic leadership diverges from the original, and most commonly used definition, thus resulting in a gap in the literature between the revised definition, and the concept introduced by Finkelstein et al. (2009). Anticipating and envisioning the future accounts for two of the six strategic leadership capabilities (Ireland & Hitt). This approach involves "defining the vision and moral purpose and translating them into action" to build direction and capacity for an organization to achieve a directional shift or change (Davies & Davies, 2010, p. 5). Through strategic leadership, organizations explore relationships between activity within the business environment and choices about collective identity, strategy, and execution (Daft, 2011). Strategic leadership spans all four phases of Vision360—the only known leadership approach to do so.

Adaptive leadership is linked to the concept of vision emergence. Adaptive leadership originates from complex adaptive systems and complexity leadership theory (Uhl-Bien et al., 2007). Uhl-Bien et al. (2007) defined adaptive leadership as "emergent change behaviors under conditions of interaction, interdependence, asymmetrical information, complex network dynamics, and tension. Adaptive leadership manifests in CAS and interactions among agents rather than individuals and is recognizable when it has significance and impact" (p.309). Within the containers created by entrepreneurs and managers for vision development and realization, organizational members will mobilize adaptive leadership skills to fill in knowledge gaps, navigate the intricacies of spontaneous conversations and interactions, and work to resolve resulting tensions. *Servant leadership* also involves vision. Unlike in the charismatic-transformational tradition, a servant leader's vision does not view the organization as an end, but treats followers as "a viable and worthy person, believes in the future state for each individual, and seeks to assist each [follower] in reaching that state" (Patterson, 2003, p. 18). A shared vision empowers and serves the needs of followers (Dennis & Bocarnea, 2005). Vision 360 leadership occurs on multiple levels throughout organizations, despite the leaders' natural or modified leadership style.

So, how does Vision360 interface with leadership styles? With change comes the acute need for leadership. Vision360 is a type of change leadership mental model leaders can use to shepherd a vision through its four iteration stages. Vision and change track with each other around the Vision360 Model. That is because vision is most closely associated with transformational change (Heim, 2018; Rothwell et al., 2016). Transformational leadership theory proposes that "employees are more likely to embrace change when a compelling vision for change is clearly articulated to them" (Haque et al., 2020, p. 160). Vision implies change, so when an entrepreneur conceives the vision for a company, it helps to think about how the organization will change over its life cycle.

This progression is not something a founder can dream up independently. Lifecycle models exist based on Greiner's (1998) original five stages of organizational growth: creativity, direction, delegation, coordination, collaboration, and the associated crises separating them. For example, the life cycle design model (Bellerby, 2017) outlined the startup, basic management, mature business, and corporate phases as part of the organizational life cycle and is separated by three transitional periods. Greiner's model places the organizational agent amid a firm's evolution, looking back at its history to gain insights into its current operation and future change. Bellerby's model examines organizations through the lens of organizational design and at each stage of the lifecycle from its inception and growth to maturity and decline.

Change Leadership Tips

Resistance and change readiness are two sides of the same coin. Leaders must deploy positive antibodies to flip the vision-culture dilemma and sustain the company into the future. Here are eight tips to transform resistance into readiness.

1. *Lead yourself first*

Perform a self-examination before the change initiative. Ask yourself, "Why do I want to make this change? How will it benefit my organization? How will it benefit me?" Then, invite others into the conversation. Ask trusted peers or advisors, "What am I not seeing?" Make sure to assemble and master your backstory of why the change is needed.

2. *Become a change catalyst*

If you are frustrated with the status quo, likely, your employees are too. Some team members are anxious about telling you that change is needed for fear of recourse. As a leader, your job is to spark their desire for change and encourage them to let their light shine. Your engineers have technical intel. Your salespeople know what customers want even if your company has not built the products yet. The key to your future will not be found by rearranging names on an org chart. Your company's future lies dormant within your team members. As a visionary leader, your role is to excavate their creativity.

3. *Build motivation and desire*

Employees are reluctant to change when they feel they ought to. They pick up the pace when they need to. When team members want to change, they pull out all the stops. Creative and innovative ideas are in free flow. Managers voluntarily stay late and arrive early to complete pet projects. They seek common ground with other departments to accomplish shared goals. Managers value and communicate the change to others because they feel they have the collective capability to change.

4. *Communicate the need*

Managing the communication process is critical for a successful change initiative. Once your team members recognize the need for change, find creative ways to keep that need ever before them. Provide followers with a safe space to give feedback and give them your feedback as well. Be strategic in your communication but authentic in your approach.

5. *Empower Others*

A business cannot reach its full potential when senior leaders hoard control. Empower them by clarifying which decisions they can make without your approval and which decisions they need you to sign off on. Then, trust them to make values-based decisions.

6. *Exercise agility*

Change efforts do not unfold in a linear fashion, and things will not go according to plan. Change is messy and iterative. Accepting that fact will preserve your sanity. New goals will emerge as change progresses. Agility can also prevent a team from committing to a solution or intervention prematurely. It can also help teams decide whether to persevere or pivot.

7. *Hire and contract outside experts*

After setting a goal to reach $100MM in top-line revenue within 5 years, senior leaders of an Inc5000 company in the IT and Healthcare services space watched revenues decrease. Two years into the process, They hired a chief growth officer with experience in small and large businesses. He assembled leadership, rolled out a plan, and invited employee input. He asked directors and middle managers, "What does the growth goal mean to you, given your specific lane in the organization? What does your staff have to do to get their results? What IT infrastructure do we need to put in place? What opportunities are we going after?" He also convinced the leadership team to tie the bonus structure to the KPIs. For the first time in 3 years, the company's revenue moved in the right direction.

8. *Sustain the Change*

Continuous improvement is critical to sustaining change. The practices your company starts during a change initiative must continue to make change stick. The organization can easily default to the status quo without tweaks and tune-ups.

Summary

Diffusing vision throughout the organization will not ensure its adoption. For the preferred future to be progressively accepted throughout the organization requires culture transformation and the diffusion of development. The culture of Blockbuster released antibodies to defend the established organization or the "status quo" from potential threats or antigens.

This chapter discusses myriad ways development is diffused throughout organizational life by galvanizing support and coordinating activities to transform the vision into reality. As employees create this new preferred future, building a coaching culture can facilitate the spontaneous interactions that lead to vision emergence. In summary, the development of people, ventures, and organizations represents a critical step for effective vision integration.

The following six takeaways apply:

- Vision and development must be diffused throughout the organization for the preferred future to be accepted into and integrated throughout organizational life.
- If the organization fails to invest in developing its employees, managers, and leaders, it will lack the proper knowledge and capabilities to enact the vision.
- Leaders create and alter the organization's systems to accommodate vision development. They also develop workers, managers, and executives who will carry out the vision.
- Different leadership approaches, such as visionary, vision-based, strategic, and transformational leadership, play a role in vision development. Multiple leadership approaches and styles involve vision at varying degrees, including strategic, transformational, visionary, and vision-based leadership.
- Hence, startups engage in venture-specific activities such as customer, market, and business development on the one hand and rapid prototyping, experimentation, and product development on the other.
- Organization development takes a humanistic approach to change existing structures, processes, and culture to support VDR.

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9 Tapping into the Power of the Individual

Every person has an idea, vision, or the potential to change their organizations, communities, and most importantly, their own lives. The Vision360 framework is designed with this premise in mind.

In his book *Pour Your Heart into It,* three-time Starbucks CEO Howard Schultz recounts how the fan-favorite *Frappuccino* is the product that almost got away. In the early 1990s, Santa Monica area district manager Dina Campion and her ten store managers grew increasingly frustrated. Customers were demanding a blended beverage product that Starbucks' leadership had declined to make. In the summer months, the Santa Monica store managers watched in dismay as customers walked out of their doors only to buy the blended drink from a local competitor. As a DM, Campion understood this trend on a visceral level. What were customers reading into Starbucks' refusal to provide the requested drink? What would happen to local stores if customers continued seeking to the competitors? Could this exodus turn into a more significant trend? To honor the customers' voice—one of Starbucks' core values and practices—Campion decided to go with her gut.

In September of 1993, the MVP process began when Campion seized an opportunity to make her case to Dan Moore, a former Los Angeles area manager who had relocated to Seattle to work in retail operations. After hearing her idea, Moore resourced Campion with a blender, and her team began experimentation. They did not seek permission from corporate but followed their instinct, taking a bottom-up approach to build the test case. Change catalysts often say, "It's better to ask for forgiveness than permission," when a gut check leads them down the path not taken. By early 1994, a team in the San Fernando Valley had produced a prototype, and by May, Campion permitted them to test the blended beverage with customers. Then, Campion handed the project over to Anne Ewing, who managed their Third Street Promenade store in an outdoor mall in Santa Monica. Ewing and her assistant manager, Greg Rogers, decided to improve the drink. That summer, the team presented sales and retail executive Howard Behar with two drink versions. He preferred

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Ewing and Rogers' version and took it back to Seattle for CEO Howard Schultz to taste. With Behar's support and Schultz's buy-in (albeit reluctant), the development of the product accelerated as it entered a formal research phase to garner customer feedback. By the end of 1994, the *Frappuccino* was rolled out to all Starbucks locations nationwide.

Howard Behar's mantra was, "We're not in the coffee business serving people. We're in the people business serving coffee" (Schultz & Yang, 1997, p. 250). Being in the people business paid huge dividends. By the summer of 1995, 11% of summer sales were due to the Frappuccino. Profits were up, and the stock hit a record high. In the first full year on the market, Starbucks sold $52 million in Frappuccinos, which accounted for 7% of the total annual revenue. The Frappuccino is the best mistake Starbucks (and Schultz) almost never made.

Vision Integration: Diffusing Vision to the Individual Level

Employees who have not caught the vision are more likely to be indifferent toward its realization. Moreover, workers who see the vision as a threat are more likely to behave in dysfunctional ways exhibiting counterproductive work behaviors and workplace incivility. A significant part of leadership effectiveness concerns influencing followers to overcome self-interest in favor of pursuing collective ends (Van Knippenberg & Stam, 2014). To embrace the collective outcomes, followers must be involved in co-creating them. Participative leaders invite followers' opinions and ideas for involvement in decision-making (Hackman & Johnson, 2013). Such involvement tops the list of Millennials' and Gen Zs' expectations for their leaders regardless of status or position in the company.

Leaders transform and redefine company cultures to infuse the vision into every facet of organizational life. Culture has "a holographic quality…that is arguably its major source of power as a factor influencing effective management" (Morgan, 2006, pp. 99–100). According to the principles of cybernetics:

> Vision, core values, and additional dimensions of culture, must create space in which productive innovation can occur. In this way, the culture that unites an organization can have an enduring yet changing form, as the visions, values, and operating codes get expressed in different ways at different times and evolve with changing circumstances. (Morgan, 2006, p. 100)

Interpersonal communication among all types of adopters is critical to vision diffusion, where sharing one's experiences with an innovation convinces others to adopt the new idea (Kohles et al., 2013). Therefore, leaders who tap into the power of the individual can leverage complex systems, replete with spontaneous and planned interactions, for vision development and realization. These employees who have adopted the vision use it to guide their daily activities. The empowerment section will unpack this dynamic further.

Founders are first and foremost individuals. Their inability to differentiate their personal or individual vision from an emerging collective vision can spell trouble for vision diffusion and integration. This dynamic tracks back to the Autonomy-Empowerment Paradox explained in Chap. 6. The weight placed on a founder's vision can shift at these times, especially when outside investors get involved. An organization quickly expanding due to the involvement of more stakeholders can soon find the founder's vision as one among many. Combined with a decreased stake in the company, the founder may find themselves contending with their board of directors over the company's direction. If they agree on the trajectory, they may differ in formulating or implementing the strategies to reach their destination.

The Pathogen of Perfectionism

Vision integration is about decentralizing a vision and making it accessible for individual contributors to act on it. This action has enemies assigned to stop it from being taken. Negative antibodies lurk about in a last-ditch attempt to preserve business as usual. Remember the containers of vision emergence mentioned earlier? That was just one side of the container story—the side favoring the new vision. The containers within the old culture act as pathogens containing negative antibodies assigned to extinguish forces that support a change in strategic direction (Fig. 9.1). This chapter zeroes in on a specific organizational pathogen: perfectionism.

In March 2020, businesses worldwide shut down due to the first global pandemic in nearly a century. Covid-19 is an infectious disease caused by the novel coronavirus, SARS-CoV-2, which stands for Severe Acute Respiratory Syndrome Coronavirus 2. According to Alberts et al. (2002):

> Infectious diseases are caused by pathogens, which include bacteria, fungi, protozoa, worms, viruses, and even infectious proteins called prions. Pathogens of all classes must have mechanisms for entering their host and for evading immediate destruction by the host immune system. Most bacteria are not pathogenic. Those that are contain specific virulence genes that mediate interactions with the host, eliciting particular responses from the host cells that promote the replication and spread of the pathogen. Pathogenic fungi, protozoa, and other eucaryotic parasites typically pass through several different forms during the course of infection; the ability to switch among these forms is usually required for the parasites to be able to survive in a host and cause disease. (Alberts et al., 2002)

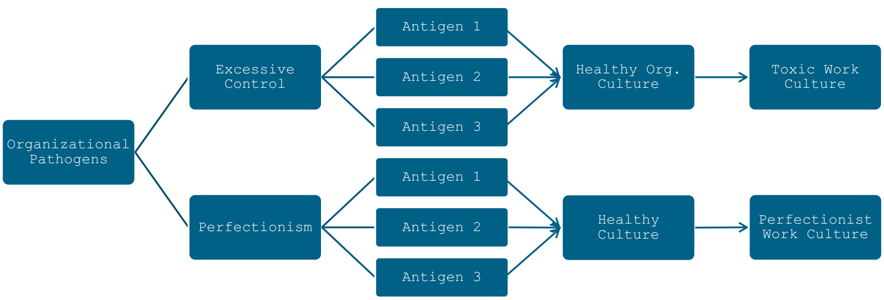

Fig. 9.1 Organizational pathogens: Two Examples

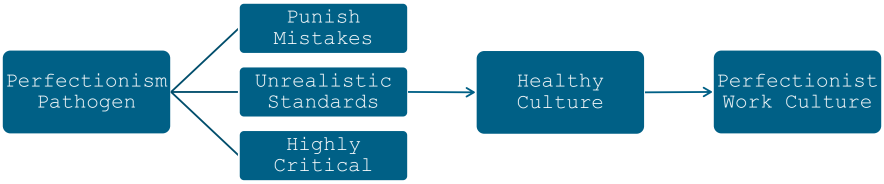

Fig. 9.2 The perfectionism pathogen

Perfectionism acts like a pathogen in work cultures (Fig. 9.2). When perfectionism infects an organization, a formerly healthy culture mutates into a perfectionist work culture. Perfectionism is "a tendency to set unrealistically high standards of performance" and is characterized by "biased and overcritical evaluations of the self and others" (Ocampo et al., 2020, p. 144). According to Ocampo et al. (2020), "cultural shifts such as tougher social and economic conditions and heightened meritocracy…actively encourage the rise of perfectionism across the industrialized world" (p. 145). Consequently, organizational leaders are increasing demands and expectations for employees "to attain near-impossible performance standards…go beyond assigned work duties…take initiative in everything they do, and…[commit] to their own professional development" (Ocampo et al., 2020, p. 145). Perfectionism negatively impacts individuals' emotions, thoughts, behaviors, and physical health (Ocampo et al., 2020). For example, workaholism links to the unfulfilled pursuit of perfection (Robinson, 2000). The type of perfectionism that leads to workaholism can drain creative energy. Undoubtedly, perfectionism represents a stealthy organization antibody and an enemy of creativity.

The underlying assumptions of workplace perfectionism are the age-old economic goals of organizations, including efficiency, performance, productivity, and profitability. An exaggerated focus on such outcomes, at the expense of human-centered values, contributes to employee perfectionism and workaholism. Leaders should mediate this relationship with an employee focus. Alexi Robichaux, CEO of BetterUp, discussed the increased dialogue about meaning and purpose in the workplace, where employees expect an "economic exchange and an existential exchange" (From Day One Conference, 2019). This unmet need contributed to the realignment of employees within the workplace, also termed the "Great Resignation" (Wooll, 2021). From a team member's perspective, the meaning of work can fall into three categories: a job that provides the "means to a financial end," a career that leads to continuous advancement with organizations, and a higher calling through which employees live out their life's purpose (Beukes & Botha, 2013, p. 3). Each category fits the description that meaningful work involves "finding a purpose in work that is greater than the extrinsic outcomes of the work" (Arnold et al., 2007, p. 195). The organization's higher purpose should tap into the individual's need for a greater meaning in their work. A leader's challenge is to "translate the vision into a reason for being for each employee by continually relating the vision to their individual cares, concerns, and work" (Hickman & Silva, 1984, as cited in Kohles, 2001). As such, the collective vision should accommodate team members' individual aspirations, resonate on a deep level, and reflect their *raison d'etre*. In summary, perfectionist cultures smother creativity.

Principle 10:
Innovation culture empowers team members with creativity to make vision-based decisions.

Cultivating Creativity and Innovation

As we quickly walked toward the rear entrance of Low Library on Columbia University's Morningside Heights campus, my friend Barbra stopped our conversation mid-stride and mid-sentence with one word: "Lee!" It was May 2003, and Barb had just gotten the attention of Lee Bollinger, the newly minted president of Columbia University. Once he turned around with a look of curiosity, Barbra immediately looked at me and said, "Thomas, we'll talk later." A 2023 article, *Reflections of an Era*, commemorating Bollinger's journey shows that such conversations and interactions were a large part of his typical day (Craig & Kisslinger, 2023). For 20 years, Bollinger deployed reinvention, creativity, and innovation—repositioning Columbia to realize its potential as a thriving twenty-first-century global university.

Cultural Evolution: Experimentation, Control, and Innovation

The context for principle ten is found in the concept that vision is an innovation (Kohles, 2001; Kohles et al., 2012). As an innovation, a vision is like a seed. The ground of the organization, or the culture, needs to have the right conditions to nurture it. The vision must be cultivated, or the negative antibodies will extinguish it.

Chapter 6 explained how new ventures and entrepreneurial cultures emerge. Founders who employ a more mature starting point for shared visioning are the architects of an experimentation culture. Either by design or by default, the experimentation culture is the first type of organizational culture. It's just the nature of a startup. So fast forwarding a few years, the organization has produced a stellar product, resonated with its target market, scaled operations, and thus entered a trajectory of fast growth. Accepting outside investment in exchange for seats on the board of directors gave the startup the fuel needed to reach each significant milestone. Each board seat represents a vested interest in the new company's success. The investors want the company to continue growing to maximize the return on their investment. The entrepreneurial culture begins to change. Time will tell whether this evolution is for better or for worse.

There are two types of control: necessary control and excessive control. Necessary control allows the leadership team to control the impact of the external VUCA environment—volatility, uncertainty, complexity, and ambiguity—on the internal organization. For example, the predictability will decrease if unbridled uncertainty enters a semi-established organization. Uncertainty is the enemy of predictability.

However, both dynamics are present in organizational life, so leaders have to figure out a way to increase predictability without stifling entrepreneurial activity. Leadership teams who exercise a healthy degree of control do so to attain their desired but distal outcomes. These five distal outcomes are performance, productivity, profitability, efficiency, and effectiveness.

Problems arise when leaders seek to exercise too much control over an organization. Excessive control stifles creativity. What started as an entrepreneurial culture can turn into a controlling or toxic culture—depending on the management or leadership approach employed. Fear rules the day in controlling cultures. People are not given the autonomy to make decisions. When they are given this freedom, it's in "a sink or swim" context where leaders fail to provide parameters for decision-making. The symptoms of controlling cultures are endless. A micromanager is the poster child for this level of control over details of organizational life. Excessive control will take a board of directors further away from its desired outcomes, not closer to them. Striking a balance is the key to getting what they want. That balance is found within innovation cultures, as discussed in this chapter.

There is no perfect culture. However, certain cultures stand head and shoulders above the rest when it comes to iterating vision. Cultures of innovation nurture creativity and encourage the expression and development of new ideas. These cultures teach team members how to flip a failure into a success. *Creativity is power*. In nature, power comes from natural resources. These resources count as either non-renewable or renewable. Crude oil and coal are examples of non-renewable resources. Sunlight and water represent renewable resources. Regardless of their classification, the power behind electricity comes from natural resources. Electricity provides one example, but there are countless others.

Creativity is a treasure—a renewable resource. It requires discovery, excavation, and refinement to optimize its usefulness and become a power source within organizations. Certain collective conditions detract from the sustainable nature of creative ideas. Inordinate control within a bureaucratic culture provides one example, and the prevalence of perfectionist work cultures provides another. Creative ideas fuel the fire of innovation, but businesses that do not innovate will die. Therefore, innovation is one indicator of organizational health. Innovation antibodies are used to discourage change and innovation in organizations. Davila et al. (2006) provided symptoms of innovation antibodies and a list of innovation blockers. Leaders can use this list to look for symptoms of ill-being in their organizations. The following signs indicate organizational antibodies are blocking innovation:

- The "we have always done it that way" mentality dominates decision-making
- NIH Syndrome (Not-Invented-Here)
- Failures are socially punished
- Power structure supports the status quo, and fights change
- Managers see supporting innovation as reducing efficiency and as a waste
- Measures and rewards support a focus on short-term efficiency
- Innovations are funded based almost entirely on financial metrics
- A lack of tangible commitment to innovation from top management

- Innovators are ignored or rewarded unfairly
- Ideas have nowhere to go
- Innovation is treated as discrete and isolated events rather than day-to-day activities. (Davila et al., 2006, p. 99)

Visionary Leadership Velocity Principle

Shared visioning accelerates individual creativity in the direction of an organization's future.

Creativity: Generating and Implementing Ideas

Creative ideas act as the fuel powering organizations and creative leaders empower their teams to translate ideas into action. The generation and implementation of creative ideas imply the existence of innovation, which consists of two phases. According to Hülsheger et al. (2009), creativity represents the *first phase* of innovation wherein ideas are generated, and implementation represents its *second phase.* Both are subprocesses of innovation.

Transformational leadership is an individual determinant of creativity and an antecedent of implementing innovation (Ramos et al., 2018; Singh et al., 2021). Transformational leadership links innovation culture to leadership. Table 9.1 lists individual/behavioral level and organizational-level factors in the business environment that determine creativity (Ramos et al., 2018). Some determinants are related to culture and others to climate, but both dynamics provide underlying mechanisms that lend to creativity and, thus, innovation.

Cultures characterized by engagement, experimentation, and coaching bode well for big ideas in visionary organizations.

Table 9.1 Factors driving creativity in organizations

Determinants of creativity (Phase One of innovation)	
Individual and behavioral determinants	Organizational determinants
Leader's moral posture	Risk-taking incentives
Transformational leadership	Rewards
Emotional intelligence	Bonuses
Bullying by the leader (negative effect)	Participative management
Mutual respect among peers	Organizational support and idea consideration
Life experience	Knowledge management
Ambition/self-esteem	Intrinsic motivation management
Knowledge/education	Collective engagement
Personality	Team cohesion
Way of thinking/values	National/regional culture
Psychological state	

Source: Ramos et al. (2018)

Cultures of Engagement

Pizza parties do not sustain employee engagement. Nor do Chief Fun Officers. Team members want to enjoy themselves and be rewarded, but they also want to be engaged in meaningful work. Self-actualization is more sustainable than filling the work calendar with painting and pizza parties. People want to become the best version of themselves and not have to leave this version of themselves at the double doors on Monday morning. This perspective is counterintuitive and a complete change from traditional management principles that say employees should do what is best for the company and leave their whole selves at home. Thanks to an uptick in remote work policies, many people are at home—while working. The rules of the game have changed.

Extra energy is required to shift an organization from its current state to its future state. According to the physical sciences, such an application of energy results in a "phase change." An ice cube melting into a puddle of water provides one example of heat providing the extra energy to initiate such a change. Within an organizational context, however, engaged employees provide organizations with the extra energy needed to shift the organization and its culture from one state to another. Leaders who create and sustain cultures of engagement indirectly empower team members to go above and beyond the call of duty to pursue the organization's preferred future.

Regarding developing cultures of engagement, visionary leadership was "found to have a positive effect on organizational performance through a mediating variable of extra effort" (Carter & Greer, 2013, p. 379). By definition, team members and managers who go beyond the transactional employee-employer contract and expend extra effort at their discretion are engaged (Aon Hewitt, 2012; Simpson, 2009; Towers Watson, 2012). Moreover, Eldor (2020) found that "a shared vision generates the collective investment of the physical, emotional, and cognitive capabilities of employees in their service work….[and] this value-creation capacity, embedded in a collective engagement mechanism, can effectively be amplified by shared vision – particularly in high intense competitive market environments" (p. 199). The discretionary or extra effort expended by engaged employees is one factor linking visionary leadership to organizational performance.

The current VUCA environment calls for a sustainable approach to employee engagement. Organizations are helping employees to create "internalized engaged states" that outlast one-off events and activities like pizza parties (Crabb, 2011, p. 33). Towers Watson (2012) refers to this phenomenon as "sustainable employee engagement," where managers ensure their team members are engaged, enabled, and energized. Engaged employees are willing to go the extra mile for their companies. To enable their employees, companies promote multiple pathways to productivity. These dynamics work together with a workplace experience that fosters employee well-being to create energizing effects. According to the Gallup-Healthways Global Well-Being Index, well-being consists of five components: purpose, social, financial, community, and physical. High levels of purpose well-being link to team members liking what they do and being motivated to achieve personal and professional goals (Gallup, Inc. & Healthways, Inc., 2014). Purposeful well-being connects an individual's needs and desires to the organization's vision and objectives through engagement and self-actualization.

Cultures of Learning and Experimentation

The culture development narrative is essential to understanding how shared meaning unfolds in new ventures. As a type of shared understanding, a culture facilitates the integration of knowledge within firms (Grant, 1996). Because a startup has features of a temporary organization (Blank & Dorf, 2020), many aspects of its development are experimental. This type of culture coincides with the third loop of sharing vision (Senge et al., 1994), which centers on testing and experimentation and provides a direction for future research. Such activity depends on individual creativity and an organization's capacity for risk.

Game-changing creativity does not require excessive spending. According to Schrage (2016), strategic visions can inspire "a passionate commitment to bold hypotheses, experimentation, and scalable testing" (p. 142). A strategic vision will empower team members to create faster, better, less expensive experiments (Schrage, 2016). Such experimentation requires managers to suspend their need for control or trade it for the ability to create value through learning. Constraints can either stifle or enhance creativity. An organization benefits from helping its managers adopt mindsets that deal with the paradoxes between control and learning. When leaders assist managers this way, they shift from a control-oriented status quo to a culture where leaders expect employees to experiment—one where creativity counterbalances constraints (Schrage). The value of such cultures rests in decreasing risk by embracing the inevitability of failure. Entrepreneurs mitigate risk using validated learning to reduce the failure rate (Ries, 2011). To minimize risk, a startup should test the "leap of faith assumptions" expressed in its value hypothesis (i.e., how it creates value for clients) and growth hypothesis (i.e., how it creates value for itself; Ries).

De-risking Innovation with Design Thinking

The multiple expressions of excessive control limit the creative power that fuels innovation. Many organizations control for efficiency which Daft (2013) defined as "the amount of resources used to achieve the organization's goals" (p. 23). A core value of an efficient organization is to eliminate waste. When human and financial resources do not result in immediate production, managers likely view them as contributing to waste and inefficiency. Eliminating waste may contribute to efficiency but does not automatically lead to effectiveness. An efficient organization can fail to reach its goals. Organizations that walk out a terminal value of eliminating waste are considered efficient but may not be effective.

An entrepreneurial company views waste differently than an established business. The ultimate source of excess in a startup or corporate venture is "making something that nobody wants" (Ries, 2011, p. 181). For example, when entrepreneurs overestimate the demand for a new product, their organization risks falling short of achieving effectiveness goals. Leaders who cut costs only to trigger a domino effect of service delays, customer dissatisfaction, and decreased sales find their organizations in a similar situation (Daft, 2013). Efficiency goals seek to maximize production while minimizing inputs, resources, and costs (Burton et al., 2015). When unmitigated, a single-pointed focus on efficiency unleashes organizational antibodies that oppose new ideas, especially big ideas.

Design thinking provides an antidote to vision-stifling antibodies desperately trying to defend a status quo on the decline. This “de-risks” a new venture according to the work of Liedtka and Ogilvie (2011). Leaders who adopt a design thinking perspective shift their perception concerning innovation-centered activities away from a preoccupation with eliminating waste and toward investments in experimentation (Oster, 2011). Design thinking combines “a human-centered focus with iterative prototyping and testing” (Liedtka et al., 2020, p. 157). The discipline applies in various contexts, including “citizen-facing product/service, internal-facing product/service, internal process improvement, technical solution, meeting facilitation, education, strategy, and policy” (Liedtka et al., 2020, p. 163). Additionally, designers employ practices characterized by user focus, problem framing, visualization, experimentation, and diversity (Baker III & Moukhliss, 2020). Both efficiency and effectiveness goals are required for business success (Daft, 2013). Design thinking integrates these two aims to de-risk a startup vision.

Coaching Cultures

The vision iteration process allows organizations to mobilize more impactful communication practices. Coaching deepens the efforts of both transformational and visionary leaders. Coaching competencies include personal goal setting, active listening, and exchanging feedback. According to James Lopata, former vice president of coaching supervision at AceUp, coaching is (1) future-thinking, not backward thinking, and (2) emergent (AceUp, 2020). Coaching and vision iteration are a match made in heaven.

Coaching adds one more “e” word to the three components of sustainable employee engagement (i.e., engaged, enabled, and energized) in the form of “eliciting” or drawing out the brilliance in others. Coaches help team members mine their experiences and tacit knowledge, ultimately excavating creative insights to apply to operational challenges and growth goals. When well-timed, such practices help team members meet the moment and participate more effectively when vision emerges from unplanned interactions. Informal coaching conversations around the water cooler differ from formal, uninterrupted 60-minute coaching sessions. When both types of interactions begin, an organization may indicate a coaching culture. An organization has a coaching culture when:

> A coaching approach is a key aspect of how the leaders, managers, and staff engage and develop all their people and engage their stakeholders, in ways that create increased indi-

vidual, team, and organizational performance and shared value for all stakeholders. (Hawkins, 2012, p. 21)

Coaching cultures require human resource and leadership development managers to apply specific development activities. Anderson II (2021) recommended using the organizational coaching integration framework and an appreciative approach to explore the two-part question: *How is coaching embedded into my organization already, and to what degree*? Developing full-fledged coaching cultures requires a long-term, multi-step process. Along the way, sponsors roll out coaching initiatives, make coaching accessible to every level of the organization, and connect it with developmental and strategic goals. When coaching is widely available, the number of interpersonal vision-enhancing interactions within a complex adaptive system increases, along with the ability to draw each other out in their thinking to identify interactions within the organization's systems that need tweaking. Coaching cultures promote vision iteration, sustainable employee engagement, and experiential—not to mention experimental—learning.

Coaching cultures produce the caliber of employee and leader development that supports lasting behavior change. Vision statements, regardless of scope, also imply that employees and teams must adopt new modes of operation. For example, work process innovation occurs through vision-related dialogue, resulting in more effective behaviors and decisions (Kohles, 2001). Vision is an innovative idea, and sustaining an innovation requires behavioral alignment using incentives, rewards, recognition, and consequences (Davila et al., 2006). According to Kohles (2001), creating a shared and communicated vision is not enough for firms to realize a collective vision; however, each activity represents two significant steps toward aligning organizational behavior in the direction of the vision.

Empowerment and Decision-Making

Gen Y and Z employees are running twenty-first-century organizations.[1] These generations do not always want to be told what to do. They would prefer their leaders paint a picture of the outcome and empower them to find multiple pathways to deliver the results. They do not want to implement a vision developed in a war room by a group of the company's top brass. Gen Z employees want to give input to their managers along the way and see their suggestions reflected in a shared concept of the future. They want to feel included—like their voices are heard—like their concerns are anticipated.

[1] Generation Y was born between 1981 and 1996. Generation Z was born between 1997–2012.

What Does It Take to Lead Millennials and Gen Z?

In 2014, while conducting a round of interviews with founder-CEOs of Inc 5000 high-growth companies, I asked the CEO of a local executive recruiting firm a routine interview question: “What percentage of your employees are Millennials?” He responded, “I don’t hire Millennials. They don’t stick around long enough and end up costing me too much money.” Considering his response, it became clear that his command-and-control leadership style did not attract or encourage the retention of Millennial workers. He did not desire to understand how to work effectively with the youngest generation in the workforce. His rationale and resulting solution were simple to him. Because Millennial attrition was destroying his bottom line and he lacked both time and interest to figure out common ground, he solved his most immediate problem by not hiring Millennials. Since that conversation, remote work and other factors have upended the workforce, and hopefully, the CEO took the chance to correct his hard stance regarding Millennial workers. If not, the opportunity will eventually present itself, given that Millennials and Gen Zs are entering managerial and executive roles at increasing rates. Different generations prefer different styles of leadership and communication. Some leaders modify their leadership and communication styles based on follower preferences. This example showed that others do not.

The research on Generation Y and Z has increased in proportion with their economic power. According to the Pew Research Center, Millennials (Generation Y) were born between 1981 and 1996 and Generation Z was born between 1997 and 2012 (Dimock, 2019). Historically, sources have cited Millennials as having low engagement, high attrition, or turnover intention rates (Rigoni & Nelson, 2016). Although commonly discussed, Millennial attrition rates are just the presenting problem. Moreover, there is little evidence to support the widely held notion that Millennials are different from older generations as

> most studies purporting to show differences between Millennials and the Gen X and Boom generations actually just show differences between young people and older people; as they age, young people in many respects become more like their elders. Consider, for example, the quarter-life crisis. It’s a phase lots of twentysomethings go through before they learn to cope better with stress and negative feelings. (Carmichael, 2016, para. 5)

Millennial retention is not a novel issue. In a study on the impact of generational differences on work values among Baby Boomers and Gen Xers, Smola and Sutton (2002) examined whether work values remain constant or change as workers age, explaining:

> For generations, older employees (and even parents) have complained about the work ethics and values of younger generations. One must wonder if indeed each generation is more lazy and self-centered than the last or if individuals become more conscientious and less self-centered with maturity--and then simply forget that they themselves may have been like the younger generation they now complain about. (Smola & Sutton, p. 379)

Multiple studies over the past two decades noted that younger employees were less loyal and committed to the organization than older employees (Coetzee et al., 2018; D'Amato & Herzfeldt, 2008; Jayathilake et al., 2021; Mahmoud et al., 2021; Martin & Ottemann, 2015; Mey et al., 2018; Smola & Sutton, 2002). The studies were conducted when Gen X, Y, and Z represented the youngest generations in the workforce, and the findings regarding employee turnover across cohorts are the same. The results likely suggest attrition rates of younger workers mirror those of older generations at earlier life stages. The findings point to issues underlying the entire argument about Millennials in the workplace: motivators, values, and, most importantly, psychological contract expectations.

So, what is the real challenge related to younger generations in the workplace? The root cause of the issue concerning Millennials and Gen Z workers is the psychological contract they have formed with their organizations. Psychological contracts are "expectations about the reciprocal obligations that compose an employee-organization exchange relationship….a set of beliefs about what each party is entitled to receive, and obligated to give, in exchange for another party's contributions" (Morrison & Robinson, 1997). The Millennial generation is seeking "a different psychological contract with future employers, emphasizing a better balance between work goals and personal goals" (Hauw & Vos, 2010, p. 294). Regardless of their job status or role on a team, this generation expects their managers to develop close professional relationships, along with open communication, information sharing, and frequent feedback (Myers & Sadaghiani, 2010). A failure to deliver on these often unspoken expectations negatively impacts job satisfaction, employee performance, organizational commitment, and retention (Hauw & Vos). Just as human resource policies are slowly evolving to accommodate Gen Y's workplace expectations, leaders are modifying their leadership approach to adapt to the preferences of younger followers.

Decision-Making Bottlenecks: A Symptom of Founders' Syndrome

Founder-CEOs face a dilemma this author refers to as the Autonomy-Empowerment Paradox. A founder starts a business to pursue the freedom to do business their way. The company grows in the founder's hands until one day, they reach a decision point where they realize, "Either I can share my decision-making power with my team, or I can stop growing." The founder who hoards power to maintain total control will usher their organization into a period of suffering from Founders' Syndrome. Decision-making bottlenecks will be the least of their worries. However, the founder who can relinquish and retain an appropriate amount of control will emerge as the victor. Remember the Viridian story from Chap. 5 when the CEO took back decision-making power from middle managers? This one decision created a downward spiral that started with decision-making bottlenecks. Controlling leadership cultures in high-growth small businesses leads to a domino effect. Founders can avoid the series of unfortunate events experienced at Viridian using insights from experimentation—remembering that allowing followers to test their initial idea is a form of shared visioning (Fig. 9.3).

How the Vision360 Mental Model Benefits Founder-CEOs

Given the propensity for boards to oust founder-CEOs after critical growth phases, learning to see the organization over long periods and at each growth stage will help a founder-CEO increase the chances of staying in their role longer. They would accomplish this by envisioning necessary changes to their leadership style and management approach to match their evolving business needs. Some founders refrain from seeking outside funding due to this tendency. However, when external funding is needed, the alternative is to assess what it will take to run the business at its various stages. Founders also need to decide if they are up for the challenge to do the inner work and enlarge their skillset. If so, they should make a development plan to broaden their technical skill base, management approach, and leadership style, preferably with the help of an outside mentor or executive coach. Suppose CEOs can start thinking about and preparing for this before the board does. In that case, they can be so much further ahead when the time comes to have a critical conversation about their future with the company and whether they are up to the task of continued growth. At this crucial stage, founder-CEOs preserve their hard-won freedom by serving the needs of followers and stakeholders in a more beneficial way.

On CEO Replacements

It is common for a board of directors to oust a founder-CEO once their company reaches success milestones in the marketplace. According to Wasserman (2012), product development and fund-raising represent two types of success that "spark crucial but underappreciated internal changes that, in turn, put successful founders…at risk of being fired" (Wasserman, 2012, p. 304). Therefore, control-oriented

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Fig. 9.3 How the Vision360 Mental Model benefits founder-CEOs founders may forego high growth in favor of growing "at a rate closer to their own ability to learn" and adjust to impending and inevitable challenges (Wasserman, p. 309). A wealth-motivated founder-CEO will bootstrap to stay on board longer than a venture capitalist firm would allow because VC firms prefer to change from a founder-CEO to a professional CEO earlier in the life cycle (Wasserman). By bootstrapping, a founder-CEO would avoid losing control of board-level decision-making from selling equity to outside investors too early in the company's lifecycle (Wasserman). This shift in the board's power structure often results in "organizational restructuring…accompanied by a change in leadership from the founder-CEO to a professional manager" (Serra & Thiel, 2019, p. 380). Such restructuring efforts can disrupt a young firm, "alienate organizational members and lead to employee turnover with a significant decrease in performance" (Serra & Thiel, 2019, p. 380). Some founder-CEOs have found that raising outside capital during the startup phase becomes a two-edged sword when the venture becomes successful.

Chapter 6 discussed autonomy as a chief motivating factor for founder-CEOs who start and operate their businesses. Founder-CEO longevity hinges on empowering followers while maintaining a healthy degree of control over their companies and autonomy in their lives. When suggesting that entrepreneurs empower employees for decision-making, some feel they are losing control of their companies. So, it is essential to reframe and even compartmentalize. First, let's reframe. At first glance, empowering employees in a startup contradicts and even threatens an entrepreneur's sense of autonomy. This situation introduces a paradox within the entrepreneur's mind—a dilemma that will never be resolved—only negotiated. The entrepreneur enters a negotiation with themselves to determine if they are willing to exchange elements of their autonomy for greater rewards. If so, they decide how much independence they will trade for what type of return.

Learning to see such paradoxes requires a mindset shift. When vision emerges, managers encounter conflicts and threats between aspirational values such as learning and self-organization and the realities of power and control (Morgan, 2006). Because the human brain inspires management principles that contradict each other, managers grapple with the sense of paradox. Leaders can encourage employees to learn while questioning the assumptions that feed into their perceived need for total control. In 2024, Octopus Ventures announced their decision to integrate coaching into cap table and include founder coaching as a requirement when structuring investment deals (Octopus Ventures, 2023). Coaching empowers leaders who can, in turn, empower followers to accelerate decision-making. It also increases a founder's capacity to lead their team while navigating the strategic landscape. This move by Octopus Ventures reflects a growing need in the startup community for founders to remove decision-making bottlenecks in order to grow at scale.

Spiritual Empowerment Through Meaningful Work

The release of unbridled creative energy is a spiritual experience. Individual creativity resembles the Apostle Paul's description of what he termed a "treasure in earthen vessels" (2 Corinthians 4:7). From the perspective of Christian theology, such treasure shined as the light of God in human hearts "to give the light of the knowledge of the glory of God in the face of Jesus Christ" (2 Corinthians 4:6, King James Version). In a more broad organizational context, the treasure in earthen vessels is analogous to the creative spark that shines inside team members—that empowers, excites, and keeps followers inspired. Creativity is a treasure but not a rare find to the trained eye. Everyone can be creative. Regrettably, bureaucracy, routinized work, and insecure leaders often stifle raw creativity.

The desire for remote work has increased while corporations call workers back into the post-pandemic workplace. The psychological contract where workers trade eight consecutive hours for a safe job and a secure paycheck has ended. However, many employees work more than eight hours remotely each day. Thus, figuring out a middle ground is vital to the success of employees and their employers—regardless of their remote work policies.

Providing meaningful work is a way to increase and sustain engagement among Gen Z and Millennial workers. Purpose and meaning are closely related. Workplace spirituality creates "an environment where staff are engaged in meaningful work, and are developing an authentic inner self, which ensures the negative effects of emotional labor occur less frequently" (McGhee, 2019, p. 5). Visioning empowers followers and gives a broader purpose to their work. As one of five components of well-being, purpose well-being is high when people enjoy what they do daily, learning or doing something interesting that leads to goal achievement (Gallup, 2014). Allowing team members to bring their whole selves, including their spiritual selves, to work positively impacts their sense of belonging. This translates into employee retention for the visionary organization.

Faith-Work Integration

The spirituality at work (SAW) movement calls for employees to bring their whole selves, including faith, into the workplace. McGhee (2019) provides a framework organizations can use to assess their perspective and practices toward faith-work integration. Miller and Ewest (2015) proposed a four-part framework that organizations can use to approach spirituality and faith in the workplace: faith-avoiding, faith-safe, faith-based, and faith-friendly. Faith-avoiding environments suppress personal and collective expressions of faith, religion, and spirituality in the workplace (McGhee, 2019; Miller & Ewest, 2015). Faith-based organizations are the polar opposite of faith-avoiding organizations. These organizations are built around one's faith orthodoxy (correct belief) and orthopraxy (correct behavior; Miller and Ewest). Often, these organizations have a founder or CEO whose strong faith influences the overall history and culture of the organization. Faith-safe organizations neither discourage nor encourage expressions of faith but accommodate employees' faith observances according to legal requirements but are unlikely to realize a real benefit from having spiritual employees (McGhee). Faith-friendly organizations appreciate

> the connection between faith and work….actively seeks to encourage and embrace all expressions of SAW equally….' goes well beyond minimum legal requirements, and proactively welcomes and perceives employee and business benefits in appropriate manifestations of faith at work'….avoid the issues of compartmentalization…because they recognize all people bring their spirituality to work, and they want to live in ways that allow them to incorporate their private and public lives….know that such integration generates positive health outcomes for employees and positive work outcomes for the organization." (Miller & Ewest, p. 319)

Faith-avoiding and faith-safe organizations are less likely than faith-based and faith-friendly organizations to reap the full benefits of spirituality in the workplace (McGhee). Knowledge of such a framework helps employees and consultants decide whether their expressions of faith at work will likely be welcomed, tolerated, or shunned.

Unleashing Follower Creativity

Dams and waterfalls generate hydroelectricity by turning potential energy into kinetic energy. Confident leaders who empower their team members and give them a safe space to release their creativity unleash the power of vision emergence in their organizations. Similarly, great leaders draw out and direct creative energy to power organizations. Creativity is the power to produce ideas, and everyone has it, even if they are unaware of how to use it for themselves and their organizations. In other words, your team members *already* have the ideas that would propel your organization to its next phase of development. Idea generation is not enough. Teams need leaders who will empower them to implement their great ideas.

Empowerment gives individuals the freedom to implement and recognize which decisions to make on their own versus which choices they need to collaborate with others inside the organization versus which decisions they do not have the power to make but to influence. The level to which such influence is distributed depends on the comfort level and values systems of leaders and followers, along with the power distance index of their cultures (Hofstede et al., 2010). Empowering followers involves a leader sharing their decision-making power with team members. Daft (2011) referred to empowerment as a source of motivation within organizations that includes "power sharing, the delegation of power or authority to subordinates in the organization" (p. 243). The aim and challenge of power-sharing rests in management's expectation that employees make decisions as if the manager were making the decision themselves (Vempati, 2013). Making such decisions implores the attunement to a collective vision. Employees must understand the principles driving their manager's decision-making processes to be effective and gain clarity concerning expected deliverables and intangible results.

By nature, flatter organizational structures imply the existence of decentralized decision-making processes. The power to decide is diffused throughout the organization to reduce decision-making bottlenecks—starting with the CEO and cascading to the top management team, senior and middle management, and managers and individual contributors. Managers empower their team members to make decisions within a selected framework and provide coaching and mentoring to facilitate learning (Daft, 2011, 2013). Empowerment changes the conversation.

Empowering followers is especially important in entrepreneurial organizations. Moreover, the shift from control to empowerment is difficult for entrepreneurs. When at their personal best, "leaders never take control away from others" but instead empower followers to make decisions and take responsibility for the choices they make (Kouzes & Posner, 2017, p. 241). Unlike in the case of Viridian, influential leaders do not arbitrarily take back decision-making power after a manager has stewarded that power in the leader's and organization's best interest. Leaders use their agency for more effective emergence through the distribution of control. Control in a CAS is "distributed throughout the system," causing structures that are resilient and "capable of reorganizing in response to both small and large events" (Olson & Eoyang, 2001, p. 75). This phenomenon is well documented in the biological sciences among schools of fish and flocks of birds (Hemelrijk & Hildenbrandt, 2012) and groups of mammals and crowds (Vicsek & Zafeiris, 2012). According to self-organization theory, complex group behavior may originate with relatively simple rules of engagement that drive their behaviors and interactions with other group members (Couzin & Krause, 2003). When birds fly in V-formation, for example, they follow three simple rules: (1) stay together, (2) do not crash into each other, and (3) avoid predators and obstacles (Cabrera Research Lab, 2017). They do not have a leader out front directing their activities or any global awareness of the whole system. The birds follow a few basic guidelines for self-organization.

Complex adaptive systems (CAS) take many forms, ranging from a flock of birds or a herd of zebra to individual agents operating within an entrepreneurial business. Regardless of its configuration, a CAS cannot be controlled but can be managed (Palmberg, 2009). The task of management within organizations is "to direct the efforts of all the components toward the goals of the system" (Palmberg, p. 486). Palmberg (2009) proposed two approaches for doing so: (1) *visioning* or "the capacity to hold a shared picture of the future [one seeks] to create," and (2) implementing *attractors* more robust than those that currently exist to catalyze movement in the direction of change. Entrepreneurial leaders have a vision, yet one person cannot make a vision happen independently. Furthermore, employees need more than knowledge of a preferred future to transform it into reality, even if it is widely shared. Before an entrepreneur can buy into the need to empower employees for vision development and realization, they should begin to unpack the need for autonomy that underscores their decision to start a business in the first place.

Leaders make decisions using mental models, assumptions, underlying beliefs, principles, and values. Entrepreneurial leaders, such as founder-CEOs, begin with vision as a primary mental model and actively transform the image of their business into reality. In addition to the vision for their organization, founder-CEOs need to have a vision for their personal development and that of their followers. Leaders can use their agency in a follower-centric way to develop followers to their full potential. Vision is a huge part of this equation.

Empowering Followers in Fast-Growing Companies

When considering the question, “What do you empower followers for?”—the short answer is “decision-making,” which becomes critical to a startup’s growth. Failing to empower employees within fast-growing organizations produces undesirable consequences and creates decision-making bottlenecks. Viridian’s case illustrated the worst-case scenario. However, as startup organizations mature, the founder-CEO’s position and associated power evolve from a central role surrounded by their vision and capability for early success to a more peripheral role with limitations on decision-making power (Wasserman, 2017)—with notable exceptions, like Steve Jobs. The evolution of the founder’s role, along with their willingness to relinquish appropriate control of their “baby,” impacts a firm’s valuation after the first three years (Wasserman). Founder’s syndrome can take hold during this time, and operations can directly reflect the founder’s and early joiners’ personalities (Boustani & Boustani, 2017). Balancing empowerment with control becomes a dilemma for founders and executive leaders.

By empowering team members, leaders help to reduce wasted time, energy, and motivation associated with decision-making bottlenecks. Leadership behaviors, including coaching, mentoring, two-way communication and feedback, and assigning leadership tasks, help to keep employees motivated and mobilized. According to Zhang and Zhou (2014):

> Employees with high levels of uncertainty avoidance will welcome empowering interventions from their supervisors (such as expressing confidence in their abilities, emphasizing the significance of their contribution, offering them opportunities to participate in decision-making) if they trust their supervisors, because these interventions provide them with clarification of expectations and assurance of the permission they require. (pp. 152–53)

Garvin and Roberto (2001) recommended a radical departure from the traditional view of decision-making as a one-off event and toward using inquiry to treat decision-making as a process. It is important to let team members know what decisions they can make on their own, which decisions are shared, and which decisions demand a manager’s approval.

Behavior

Active listening is a coaching behavior that works in any business space. It certainly worked at Starbucks during the Frappuccino emergence. Schultz and Yang (1997) warned entrepreneurs against falling into a trap where they reject ideas that do not fit neatly within the original vision. This was a situation where the value of individual creativity combined with a willingness to experiment produced a spontaneous innovation. Innovation cannot be held to a schedule, but it can introduce an element of creative tension between the operational reality and the future opportunities.

Adopting Creative Behaviors

Vision and innovation work hand-in-hand. Moreover, vision integration calls for organizational members to adopt new behaviors that produce innovative ideas and develop the vision. Sustaining such innovations requires effective incentives, rewards, and recognition (Davila et al., 2006). Managers should reward team members when their behaviors align with the innovation strategy. Employees should also understand these expectations and the consequences of misaligned and unethical behaviors.

Visual Thinking Techniques

Visual thinking is a creativity-inspiring practice individuals and organizations use to translate ideas into tangible expression. One cannot talk about adopting a design thinking approach without the implication of such creative behaviors. Visualization is a meta-tool used in every stage of design (Liedtka & Ogilvie, 2011). Chapter 2 discussed how visualization minimizes generation loss by helping to translate information into images. Liedtka and Ogilvie (2011) defined visualization as “the transformation of information into images that you see, either literally with your eyes or figuratively with your mind’s eye” (p. 49). Visual thinking, rapid prototyping, and experimentation are creative and innovative behaviors leaders use to translate vision into action by making the picture more granular.

Visual thinking techniques elicit and preserve creativity. Brown (2009) recommended using visual thinking to accurately express ideas because “only drawing can simultaneously reveal both the functional characteristics of an idea and its emotional content” (p. 80). Because of its age association, employees generally underuse the skill of drawing in the workplace. Still, leaders and followers can apply visual representations in structured ways (e.g., mind maps) and unstructured ways (e.g., quick sketches of ideas and prototypes). Regardless, drawing represents a simple creativity-enhancing activity to illustrate obscure concepts.

Design thinking represents a convergence of vision, innovation, and creativity at individual and group levels. The practice of rapid prototyping embodies this convergence and produces a MVP. It helps to juxtapose and evaluate a shift from specification-driven design to prototype-driven design to fully appreciate the value of an MVP within a startup context. Rapid prototyping enables designers to start product and customer development early.

Experimentation for Net Gain

Imagine the differences between working for a large bureaucratic organization and a nimble startup. The differences are staggering, especially considering the values and resulting behaviors required to succeed in each environment. Now imagine someone who has gotten swept up in the “Great Resignation,” quits their job at a corporate behemoth, and gets hired at a new tech startup. Even though this employee may not initially be privy to high-level information concerning corporate strategy, they will likely notice the difference in the cultural norms and behaviors expected of employees. Every minute and every dollar counts and must be put to good use.

The business's life depends upon it, as the amount of runway the startup has is ever-present in the founders' minds. The new team members should operate with these fundamental differences in mind, as knowing how to conduct themselves in the new environment will determine the new employees' likelihood of success.

One new behavior the employee should adopt almost immediately is conducting experiments to test the founder's vision. This principle applies to the product vision in established organizations and corporate and entrepreneurial ventures. Blank and Dorf (2020) provided insights on deconstructing and testing the founder's conception of a collective future in a lean startup through four steps of customer development: discovery, validation, creation, and company-building. The two serial entrepreneurs recommended rejecting traditional product management processes learned in established businesses but instead regarding a founder's vision as "a series of untested hypotheses in need of 'customer proof'" (Blank & Dorf, 2020, p. xxiii). In the customer discovery phase, for example, a team member "translates a founder's vision for the company into hypotheses about each component of the business model and creates a set of experiments to test each hypothesis" (Blank & Dorf, p. 24). Contacting a product's end users starts the calibration process for the founding vision.

Consultants and technology/design executives have invented tools and methods for experimenting with product and company vision. Such resources include the Business Model Canvas (Osterwalder & Pigneur, 2010), the Lean Startup methodology and Minimum Viable Product, or MVP, (Ries, 2011), the 80/20/20 Vision framework and 5×5×5 Rapid Innovation methodology (Schrage, 2016), the Ways to Grow Innovation Matrix Brown (2009), the Customer Development Process for testing vision (Blank & Dorf, 2020), and design thinking (Liedtka & Ogilvie, 2011). Schrage (2016) proposed a methodology "that clarifies and sharpens innovation focus, facilitates alignment between top-down strategic visions and bottom-up innovation empowerment, and encourages an 'actions speak louder than words' innovation culture" (p. 3). The 80/20/20 Vision framework (Schrage) examines hypotheses to test and experiments to run "that generate 80 percent of the useful information [needed] to make a decision in 20 percent of the time, and with but 20 percent of the resources" ordinarily required (p. 6). His 5×5×5 Rapid Innovation Methodology entails "a minimum of 5 teams of 5 people each [who] are given no more than five days to come up with a portfolio of 5' business experiments' that should take no longer than five weeks to run and cost no more than 5,000 euros to conduct" (Schrage, p. 97). Work teams can use quick, cheap, low-risk experiments as a vision integration strategy to encourage deviation from efficiency-related norms designed to perpetuate an outmoded status quo (Schrage). Such frameworks draw on design thinking and agile principles to help organizations link efficiency and effectiveness goals. Creating this link makes innovation relevant.

Beyond the startup world, the need exists to connect the preferred future to followers' work roles and jobs. This connection provides meaning and purpose in the lived experience of individual followers. The often-subconscious questions are: "How do I benefit from this new vision? How does it benefit my customers and stakeholders? How useful is it?" Regarding the practical nature of a vision, Kohles et al. (2013) proposed:

> To the extent that followers perceive that the vision has relative advantage over existing ideas, high compatibility with the organization's existing values, is easy to try without incurring high risk of recrimination, and is readily observable and understandable, the more likely they are to perceive that it is useful to their jobs and the greater the commitment to the organization. (p. 479)

What customers want represents one of those existing ideas. Followers must perceive a net gain connected to adopting the vision and integrating it into their work behaviors. This net gain must exist on the collective and individual levels.

Coaching

Coaching bridges the gap between vision and action. Big picture thinkers and details oriented leaders need guidance when making decisions about specific issues. Coaching provides this guidance by partnering with leaders to unpack their situation and find their own answers. This is where coaching differs from mentoring, consulting, and advising. Coaching is a one-to-one and one-to-few vision communication strategy geared toward behavior change. The vision development and realization processes allow leaders to enlist better vision-related communication practices. As a function of visionary and transformational leadership (Sosik & Jung, 2018), coaching helps leaders to develop vision-centered communication behaviors such as active listening, personal goal setting, and exchanging feedback.

> *Because coaching behaviors naturally engage followers, leaders can effectively re-engage stakeholders in perpetuity by embedding coaching behaviors into organizational culture.*

Because coaching behaviors naturally engage followers, leaders can effectively re-engage stakeholders in perpetuity by embedding coaching behaviors into organizational culture. One way to elicit the power of individual followers is to establish a coaching culture and pursue the cultural integration of coaching capabilities within a company. Possible coaching topics include vision-based coaching (Passarelli, 2015), positive emotional attractors or PEA (Boyatzis et al., 2015), and developmental and leadership coaching.

Increased communication may lead to a collective vision guiding work behaviors and followers' decisions. Concerning vision diffusion and integration, Kohles (2001) proposed:

> Increased communication between leaders and subordinates concerning vision may lead to that vision being used more to guide the work behaviors and decisions of those subordinates. Such a result can be considered an innovation in *work processes* within organizations. (p. 10)

Additionally, Kohles et al. (2012) found vision communication was positively associated with integration in three areas:

> Task cues linking vision with actual work behaviors and decisions (top-down), follower input regarding the application of vision to work behaviors and decisions (e.g., suggestions, questions, concerns) (bottom-up), and bidirectional communications. (p. 478)

Coaching is a way to help followers tap into their power, creativity, and ability to innovate. By coaching team members, managers initiate a participative decision-making process, thus shifting their role from the single-handed decision-maker to a facilitator of team- and organization-level outcomes. As such, managers should be prepared to engage in an exchange of feedback with followers. Open two-way communication, including inviting employee feedback, has a motivational effect on followers (Sandhya & Kumar, 2011). Coaching helps leaders connect the organization to the creative power of individuals and create a feedback loop for vision iteration. When making decisions, leaders and followers must keep the vision in view. Vision-based coaching provides clarity by moving obstacles out of one's line of sight. With such hindrances removed, leaders and teams can stay focused on the preferred future and implement strategies for its realization.

Leaving Fingerprints on the Future

During a speaker training for Monster.com's college and career program, I heard a phrase that stuck with me for the last two decades. One of the trainers said the job of a motivational speaker is "to leave fingerprints on a future you can never touch." Founders of lasting companies do the same thing—they leave an enduring legacy for future generations of leaders and followers.

Founders possess specific knowledge to shape an organization's early sense of strategic direction. The initial senior management teams partner with the founder to design the company's culture, which becomes reinforced by each instance of success (Schein, 2017). The founding chief executive and team are architects of company culture. Founder-CEOs and joiners develop a unique perspective that identifies the market need and shapes an organization from the inside out to meet that need through external adaptation and internal integration (Schein). Founders play a pivotal role within the context of emerging organizations.

3M's founders possessed a "know-nothing-ness" about the mining and manufacturing industry which produced the cultural values of empathy and humility toward their employees to "provide promising people with new opportunities, support them and give them time to learn and thrive" (3M, 2002, p. 6). They could have certainly taken a more hard-nosed approach. In fact, in later years, when Jim McNerney introduced Six Sigma practices and associated values—the culture rejected it.

The concept of "patient money" grew out of 3M's founding story. Patient money was introduced by angel investor Lucius Ordway and is still used for "long-term investment in an idea, technology, or product that shows promise, even when others argue otherwise" (3M, 2002, p. 5). Without the emergence of this early cultural value, 3M would have folded before its tenth anniversary and well before becoming profitable. The early era of 3M instilled values associated with patience, learning, and perseverance.

The core values of 3M's founder illuminate a principle of complex adaptive systems: organizations are sensitive to their initial conditions and early history. Visionary leaders leave a legacy, blazing a trail for current followers to become the next generation of leaders.

Summary

So far, the book has focused on creating a vision and diffusing it throughout the organization to achieve adoption. This chapter zoomed in to the level of the individual follower and their empowerment. It pays special attention to the role of cultures characterized by engagement, learning, experimentation, and coaching in propelling teams in the right direction. Using the insights of this chapter, leaders of every stripe can learn to tap into the power of the individual more effectively.

- The enemy of progress is perfectionism. Co-creating a good enough vision is a way to overcome the associated hurdles.
- Organizations must diffuse a vision down to the level of the individual team member to complete its adoption process. Although engaging their creativity increases the chances of adoption, it also increases the need to manage complexity.
- Visual thinking, rapid prototyping, and experimentation are innovative behaviors leaders use to translate vision into action by making the picture more granular.
- Confident leaders who empower their team members and give them a safe space to release their creativity unleash the power of vision emergence in their organizations.
- A vision for change should integrate individual needs with organizational goals (Burke, 2018).
- Because coaching behaviors naturally engage followers, leaders can effectively re-engage stakeholders in perpetuity by embedding coaching behaviors into organizational culture.

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Vision Realization and Fulfillment 10

Psychologically, so many of our identities get wrapped up in the competitions we win….. often the people in our society who are very talented, very gifted, sometimes get trapped, even more intensely than [others]. If we are going to build a better future, then we need to do new things, and we can't all do the same tried and true things that have worked.[1]
—*Peter Thiel*

Have you ever wondered how Apple overtook Blackberry's market share in record time? The difference between the companies is not a matter of good and bad. It is a matter of speed, directional resistance, and decision latency.

Speed
Although Blackberry's progress accelerated with its product launch, speed was not Blackberry's claim to fame. Blackberry's predecessor, Research In Motion (RIM), was launched in 1984 by co-founders Mike Lazaridis and Douglas Fregin. Jim Balsillie joined the company in 1992 as co-CEO with Lazaridis, and the first product, the Blackberry smartphone, was launched in 1999.

In contrast, Apple was founded in 1976. That same year, Steve Jobs and Steve Wozniak took Apple's first product to market. RIM's go-to-market strategy to 15 years. Apple's took less than one year. Even though completed at different times, Apple's first product-to-market journey outpaced BlackBerry's fifteen-to-one. Apple outpaced Blackberry in winning control of the smartphone market as well. But how? Apple overtook Blackberry's market share by examining the market's future, executing a faster-go-to-market strategy, creating and controlling an application marketplace, and disrupting the smartphone industry.

[1] The Aspen Institute. (2015, July 2). Peter Thiel: We are in a higher education bubble [Video]. YouTube. https://www.youtube.com/watch?v=H5NUv0nOQCU

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Directional Resistance

BlackBerry set the trend in smartphones until Apple set a new industry standard. Overnight, Steve Jobs' iPhone announcement redefined which end was up, disrupting the smartphone industry and turning BlackBerry's financial performance upside down. The impending seismic shift in the smartphone market went undetected and unexplored at Blackberry. RIM's senior management believed the value its core customers placed on security, efficient communication, and physical keyboards would offset the departure of customers who wanted more immersive applications and multi-media capabilities the iPhone offered (Fingas, 2015). In essence, executives downplayed the threat of the iPhone's allure to Blackberry's market share. With a focus on their customer base, the Blackberry leadership team likely underestimated the effects of individualism in hyperdrive—not only of the hidden keyboard and larger screens but also of Apple's app marketplace, which democratized app development and monetization. Chief executives and senior leadership were also vulnerable to what growth and turnaround expert Christin Comaford deemed a "severe reality distortion field"—a side effect of Founderitis (Posner, 2012). Lastly, innovation and democratization of personal computer devices were in Apple Computer's DNA and likely served as a boon to discerning an alternative industry direction given the unmet needs of smartphone users.

In physical science, resistance is an opposing force that slows down another force. In Blackberry's case, the leadership team's resistance did not stop Apple from encroaching on its market share. Their resistance impacted the speed at which reality could set it. Resistance served as drag, which negatively impacted BlackBerry's acceleration and velocity. In organizational science, resistance works the same way as drag, and its effects can be devastating.

Decision Latency

The decision to adopt an innovation, or the innovation-decision process, consists of five main steps: knowledge, persuasion, decision, implementation, and confirmation. Leaders and team members possessed accurate knowledge, but they were not convinced, which caused the third step of innovation adoption to be delayed. Blackberry was not persuaded of the threat of Apple's iPhone until it was too late and their decision latency proved to be a costly mistake. Apple gained ground faster than Blackberry anticipated, causing a series of pivots. The transformation of BlackBerry is a work in progress, and it is undoubtedly a completely different company than it was in its heyday.

Perpetual Velocity

This chapter's opening quote by PayPal co-founder Peter Thiel comes from a discussion on higher education with David Bradley of Atlantic Media Company. It reflects the self-induced scotoma that follows success. Blockbuster and Blackberry suffered from this tunnel vision to a great degree. On the journey to victory, organizations create biases and assumptions that are reinforced by success. If not careful, leaders can allow such thinking to freeze the organization in time, not allowing it to prepare for an uncertain future—one that will include industry disruption. New ventures cannot fall into this trap. Things are moving so fast, there is simply no time to waste. The BlackBerry case illustrates this chapter's pain point. Every organization reaches a point when leaders and followers think, "So, we have accomplished our vision. What happens now?'

Principle 11:
A twenty-first-century organization continues iterating its vision to sustain velocity.

AI Venture Capitalist Paul Anthony Claxton introduced the concept of "perpetual velocity" in organizations. He stated perpetual velocity "is the opposite of terminal velocity. Perpetual velocity incorporates vision as the core/frame/idea…and continuous innovation as the acceleration for that continued vision…" (Claxton, 2020). Claxton explained his consulting methodology for deploying the concept in brands and ideas. Perpetuating velocity is the secret to building a company that scales and endures.

Collectively, speed and direction are better known as **velocity** and BlackBerry was not known for its high velocity. There was a tradeoff between the two. In the early days of Research in Motion, for example, the company was aligned with its identity but wasn't moving very fast. Once the BlackBerry product found success in the marketplace, speed picked up but the company changed direction. The company was renamed after its product and symbolized a shift in values. In terms of the Competing Values Framework, Blackberry shifted from an *adhocracy* with a focus on innovation to a *compete* culture focused on marketplace success. Thus, research and development components were placed on the backburner. Innovation negatively impacts the survival of micro-enterprises with less than 10 or fewer employees (Boyer & Blazy, 2014). However, BlackBerry had grown in revenue and staff members by this time. Several factors converged to impose a source of drag on the company's velocity and place its very existence in danger.

How Organizations Perpetuate Their Existence

Chapter 9 connected vision development to individual self-actualization, which produces individual fulfillment of one's purpose and destiny. What happens when an entire organization actualizes its identity by realizing its vision and fulfilling its purpose?

Bureaucratic organizations like the March of Dimes and NATO have no logical reason to continue after realizing their long-term vision unless external threats continue (Daft, 2013; Henslin, 2014). Startup companies reach a similar point when the founder's vision for the organization is achieved. This is the phenomenon of goal displacement in operation (Henslin, 2014). Both people and organizations have a spiritual nature. On the micro-level, people with transcendent qualities such as faith, vision, and a sense of purpose make up organizations. When people assemble to achieve something extraordinary, they collaborate to achieve economic ends. Their spiritual or transcendent nature also combines. A synergy emerges, which, on the macro level, takes the form of collective spiritual principles such as shared vision, mutual values, and a collective destiny (Kerfoot, 2000; Kouzes & Posner, 2017; Meares, 2017). Instead of March of Dimes' leaders closing up shop and finding new jobs, they formulated new goals based on organizational capital and collective mission. Borrowing from Newton's Law of Thermodynamics, organizations wind down when their visions are fulfilled unless new energy is applied. The new energy for continued collective life exudes from the VUCA environment and its turbulent conditions.

When a vision is realized, as in the March of Dimes case, increasing its strategic value perpetuates the organization's existence (Henslin, 2014). When the vaccine for polio was discovered in the 1950s, the March of Dimes had to develop a new collective goal—and not only a new goal but a far-reaching goal that would stand the test of time. For instance, one of the more recent March of Dimes slogans, "Healthy Moms, Strong Babies," is so vague and oriented toward the long-term future that it perpetuates the organization's existence forever.

In contrast, Viridian's founder-CEO practiced creating the preferred future according to personal preferences and then shared the direction through telling and selling. This approach resulted in unintentional disruption and a mass exodus of senior managers and employees. After three turbulent years, Viridian's "rewind" phase began with the entry of an experienced professional CEO who sought to become acclimated to the organization while transforming the management culture. At this writing, the company is reattuning senior managers and team members to the latent shared vision and common values. Also, top managers are realigning departments to the vision for accelerated growth. When organizations rewind, the need to reattune followers and realign the organization to a dormant vision is inevitable.

The "Re-" of Organizational Transformation

If there was one takeaway from BlackBerry's narrative, it would be that vision integration is not the final destination. Companies that are nearing the completion of one loop around the Vision360 process would do well to consider the pace at which BlackBerry handled its transformation and what it could have done differently. Insights are easy to find when comparing the Google-to-Alphabet and Facebook-to-Meta restructures to pursue moonshot projects. The Alcoa Corporate spun off Arconic in 2020, only for Arconic to spin off its Rolled Products business shortly thereafter.

The events associated with BlackBerry's evolution and transformation are not uncommon. Starbucks has reinvented itself more than once. Between 1987 and 1997, the company transitioned from a product-centered mission to a people-centered mission. After an ambitious growth program that resulted in thousands of store openings across the globe, Starbucks lost its way. By 2007, the company had veered dangerously far away from its core principles. In 2008, Howard Schultz reclaimed his role as CEO to help the company find its true north. Schultz's first official move was to close all Starbucks locations to retrain baristas to pour the perfect espresso shot, a risk few other companies had taken (Schultz, 2011). Steve Jobs found himself in a similar position with Apple when the company was floundering and needed to return to its true identity, recontextualized for new realities (Weinberger & Hartmans, 2024). Founder-CEOs have the specialized knowledge required, especially in organizational transformation, to help companies successfully adapt to changes imposed by the external environment while organizing internally to solve human challenges (Schein, 2017). Companies employ redesign, retrenchment, reorganization, and restructuring to avoid the dreaded corporate turnaround. Sometimes, those strategies work; other times, they do not.

Both Nokia and Blackberry have divested from the smartphone industry in the last ten years. The major difference is what this experience represents for each company. The Blackberry suite of products was a type of one-hit-wonder for Research in Motion. Nokia has endured over 100 years and experienced major transformations in its business model. This experience is not Nokia's first rodeo. It is Blackberry's first multi-year large-scale transformation spanning multiple CEOs.

After changing leadership, BlackBerry embarked on a complete strategic reorientation. As of April 2024, the company is on the back end of a decade-long turnaround under former CEO John Chen's leadership. Upon taking the helm in 2013, Chen returned Blackberry to its original identity. Research in Motion was more than a company's name—it symbolized its identity. The name change from Research in Motion to Blackberry symbolized a change in direction that was years in the making. The company's identity was haphazardly recentered around its star product at a time when the company was floundering. What could have been a house of brands suddenly became a branded house—and soon after, the branded house became a house of cards. BlackBerry's story is one for the history books. Post-Chen change leadership will determine how the story continues.

Using Foresight to Iterate Vision: The March of Dimes Example

A good enough vision can be made more strategic. Some visionary leaders have not received the memo that visioning is technically a phase of strategic foresight. Moreover, it is common for entrepreneurs to treat their vision as a mandate. This assumption is quickly tested in startups with the founder-CEO's ability to raise money and serve enough customers to create a viable business. Established organizations and teams that have achieved legitimacy are poised to tap into the complementary nature of visioning and foresight as methods to anticipate and plan for the future.

Because vision development is iterative, leaders can revisit the conception and creation phases to make the vision more strategic after engaging in other stages of the foresight process (Schoemaker & Gunther, 2002). There is no time limit dictating when an organization or department can travel through the various stages of the

Vision360 process. Some choose to make the vision more strategic sooner rather than later; others defer this activity until it can happen organically.

The external environment is constantly in flux and can necessitate organizational realignment with subsequent changes. March of Dimes is one of the most well-documented stories of a complete cycle of big ‘V’ vision iteration within a mission-driven organization. March of Dimes has revised its preferred future on multiple occasions to realign its strategic direction and internal operations with changes in the business environment (Henslin, 2014). The mission has evolved over nearly a century, from curing the polio epidemic of the mid-twentieth century to eradicating congenital disabilities to ensuring that babies are strong and moms are healthy (Larsen, 2012; March of Dimes). External threats to a strategic vision initiate engagement and realignment with the business environment. A revisited vision achieves its strategic nature when it is adequately positioned to meet new demands on its boundaries with the external environment (Walter et al., 2013). March of Dimes has realigned its mission with the external environment by increasing its strategic orientation on more than one occasion.

Pursuing Simplicity on the Far Side of Complexity

Organizations cycle through a multistep process when learning to transform a vision into reality. Let’s recap the major points of Vision360.

> *I would not give a fig for the simplicity this side of complexity, but I would give my life for the simplicity on the other side of complexity.*
> *—Oliver Wendell Holmes*

Vision360: The Abridged Narrative

Organizations and teams learn to see in the vision conception phase, where the search for a vision begins. Sometimes, the search is intentional; other times, teams back into it when considering external events. The vision search starts in an organization’s peripheral vision, where it interfaces with the external environment. Striking a balance between vision-related leadership and self-organization helps this vision emerge—even when leaders commission various visioning sessions. In these sessions, vision is formalized to the degree that renders it most beneficial given the company culture. The vision statement creation session is just one container for vision emergence. Vision can emerge in many unexpected ways within informal settings or containers. It is not a linear path. Remember that creating a vision should lead to a *crescendo*, not a culmination, and never a conclusion.

Creating a vision should lead to a crescendo, not a culmination, and never a conclusion.

When introduced in an existing business, vision sparks the need for transformation. This model of organizational visioning was introduced in the late twentieth century.

The visionary leadership paradigm is shifting to accommodate the spontaneous nature of emergent vision, which springs from the creative tension between the preferred future and current realities. Vision360 considered the surge in new businesses starting in the twenty-first century and recontextualized vision for startups and nascent ventures. When leaders introduce or co-create a preferred future in a new business, the company enters a specific type of transformation: emergence. A history of the innovation behemoth, 3M, illustrates the process of organizational emergence, especially the "good enough vision" concept.

The Adoption Pit is the most common problem leaders encounter when engaging in the Vision360 process. Leaders can use power and control to override resistance to any changes in the status quo. However, visionary leaders anticipate this roadblock and begin involving followers earlier in the future thinking process. They recognize the choice followers face to either accept or reject the vision. To avoid falling into the ever-present Adoption Pit, they acknowledge that vision acceptance cannot be an afterthought. When leaders guide the vision creation process while aiming to maximize vision acceptance among followers, they increase the likelihood that a critical mass of followers will accept their vision as their own. The first step to followers using the vision in practical day-to-day interactions with internal and external stakeholders has begun. The vision must reflect what followers care about *en masse*.

In addition to involving followers earlier in the visioning process, leaders also lead the charge of translating the vision into action. Translation includes planning to use the vision to develop individual followers and transform the organization to support vision iteration and realization. Diffusing a vision through a firm's culture and systems initiates the transformation needed for effective vision integration.

The shared vision continues to emerge as an organization matures. It always disrupts the status quo, but there are times when this disruption is more intense. Using shared visioning methods to reimagine an organization's future, leaders and followers can minimize the disruption that precedes the need for transformation and enable followers to self-organize to anticipate and plan for change.

Founder-CEOs often start businesses to gain autonomy. Consequently, these entrepreneurial leaders enter the first stretch of the vision journey, flying solo. As they share their vision (read: tell and sell), prospective customers and early team members join them on their quest to provide a better product, service, or experience. Leaders can press the rewind button at any time and engage in the iterative process contained in the Vision360 model. By using this process with followers, founder-CEOs and entrepreneurial leaders can become more comfortable empowering followers to enact the vision by turning ideas into action. The company's success hinges on the leader's willingness to empower employees to make decisions according to their role within the firm and for personal growth.

Businesses grow because leaders become facilitators of the Vision360 process and become comfortable helping followers release their creative power. Creative ideas serve as the fuel that powers organizations, and confident leaders give followers the authority to translate their ideas into action.

Organizations are adapting visioning practices due to increased volatility, uncertainty, complexity, and ambiguity in the external environment. Leaders respond with shared and emergent approaches to visioning, which are upending the traditional vision creation paradigm. The visionary leadership approach will endure despite its limitations, an excessive focus on communicating vision, and the implications of a lone leader creating the mental images of a preferred future. The leader-centricity of the traditional approach to vision development and realization undergirds its narrow scope. The Vision360 framework does not call for a replacement of visionary leadership. It views this leadership approach as one subphase of the vision adoption process based on related empirical scholarship. Vision360 provides an alternative, more comprehensive approach to organizational vision development and realization.

Loops of Vision Iteration

Founders of new ventures start with a vision for their lives and select others—families, customers, communities, and, often, society at large. The original driving force for success is not usually employee-centered or collective. It usually centers around the vision of the founders and the need to serve customers more creatively and effectively. As their organizations grow, the concept needs to expand beyond the founder-CEO's personal purpose for the business. It needs to include followers' perspectives to allow them to share the vision in a more meaningful way for them. The founder's ability to adopt an expanded view represents a critical moment in the organization's life cycle. A founder's inability to grow with the business and meet the moment can bring dire consequences.

Goals are achieved, and strategies are implemented, but visions are realized. Vision development is iterative. It is *not* a one-off event. The VUCA environment makes sure of it. As the vision is gradually realized, new possibilities come into view. The appearance of such new horizons suggests that vision development is an ongoing process that stands in stark contrast to the isolated vision statement creation session.

The possibilities for iterating vision are endless, considering the various approaches to shared visioning and the different stakeholder groups that chief executives involve in the process. A concept created in isolation and then shared when a founder-CEO "sells" it to a group of early team members looks drastically different from a preferred future co-created by a representative slice of stakeholders in a multi-national corporation in a whole group collaborative process. Thus, there is still much to understand about how an organization iterates its vision over its lifespan.

The four approaches to visioning (O'Connell et al., 2011) along with Senge's (1994) five starting points for shared visioning provide insight into how these loops work. After leaders work solo or with a group of top managers to create a vision, leadership communication cascades from upper echelons to lower tiers, engendering more direct and one-way communication than more participative approaches

(O'Connell et al.). It is important to note that individual visionary leaders take this first loop in some form. It's the personal vision journey in its most elementary form. However, not every leader immediately begins to tell and sell others on this vision. This discrepancy accounts for the difference between the first and second approaches. Leaders can treat their personal vision as an assumption and bring it to the table when collaborating with other leaders for vision creation. In both cases, the leader owns the process, but only in the first case does the leader own the content. Even though the leader is still at center stage in the loop approach, they wait to tell and sell until after their session with the top managers.

In the third and fourth loops, the focus shifts off of the leader and onto the followers. The leader values their input and organization-specific knowledge. The third loop centers on co-creation and iteration among leaders and followers. The leader co-creates the vision with their followers while engaging "in a sense-making and sense-giving process, with the leader proposing a vision that iteratively is modified through exchanges between the leader and followers (Gioia & Chittipeddi, 1991)" (O'Connell et al., 2011, p. 110). Iteration happens in a symbiotic process of sense-making and sense-giving. In the fourth loop, the whole organization engages in a large group collaborative process (O'Connell et al., 2011, pp. 109–110). Communication during vision creation is more multidirectional, interactive, and emergent and a critical component of creating the type of shared vision ownership by organizational stakeholders that leads to vision assimilation (O'Connell et al., 2011). The upward spiral in Fig. 10.1 reflects these four loops.

Reflection Questions

Take a look at the Vision Journey in Exhibit 10.1. Use "X" to make your current position.

1. Which loop are you in right now?
2. Who did you take with you on the loop? Which stakeholder groups were represented?
3. How was your vision shared in this loop? Which of the five starting points did you use?
4. Do you want to level up? If so, what behaviors do you need to adopt? Let go of?

Vision iteration is a metaprocess.

Individual Energy to Group Synergy

Personal visioning reflects the need to become one's best self—it leads to self-actualization. Vision starts in an ethereal dimension, and over time, the visionary realizes the big idea. Could it be that collective visioning is also a spiritual experience? It gives meaning and purpose to an organization. The meaning needn't stop at the end of a visioning experience. There is a way to infuse purpose and meaning into each day. The concepts of purpose-well being and meaningful work, discussed in Chap. 9, will perpetuate vision emergence long after a vision statement is formalized.

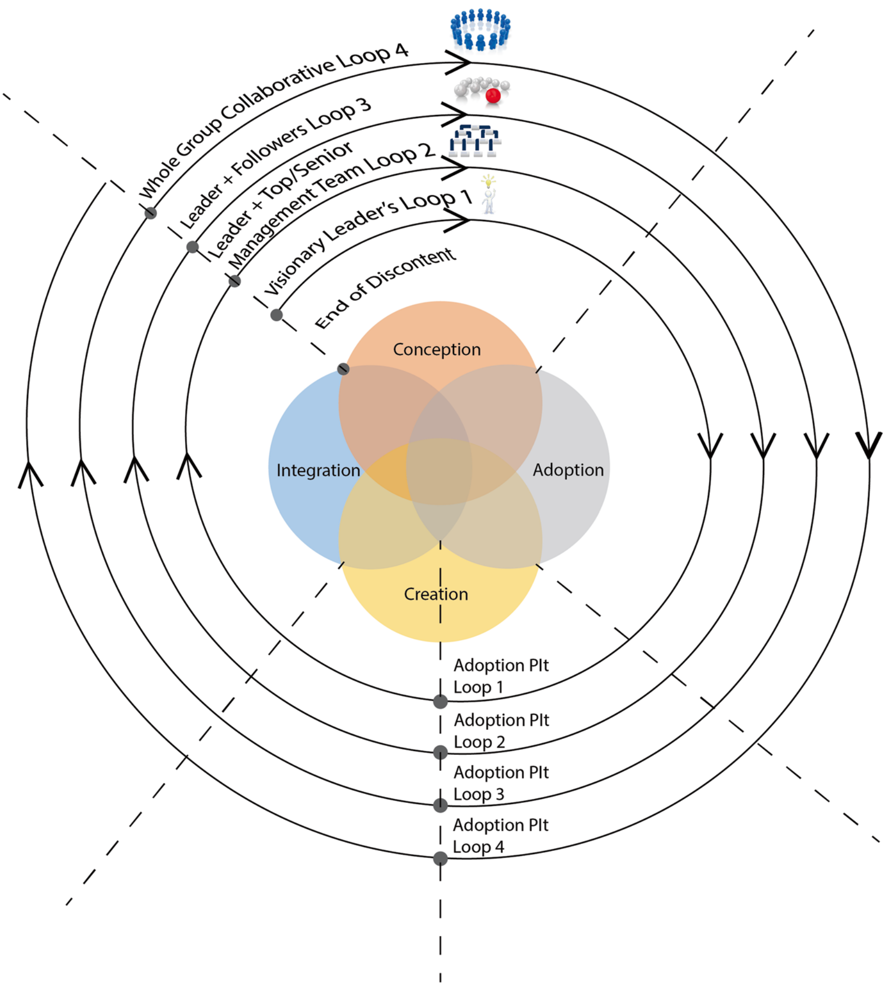

Fig. 10.1 The Vision Journey

Rewinding, Realigning, and Reattuning

If you recall, organizations pivot as a structured form of course correction to test a new hypothesis about a product, strategy, or growth engine (Ries, 2011). Pivoting is less common than iterating. Iteration is a term associated with design thinking and the Lean Startup movement. The prefix "re-" comes to mind when thinking of iteration. Iteration involves taking action consistently, learning from mistakes, taking another loop, and tracking results. When leaders engage in vision iteration, they lead followers in testing, optimizing, and calibrating a collective vision until the organization effectively responds to external and internal demands.

Sometimes, as a leader, you need to rewind. Other times, you realign the organization to support vision iteration. In both cases, you may find it necessary to reawaken and reattune followers to the inkling of a better future—especially when conditions are less than ideal and headed in the opposite direction than one would prefer. Rewinding generates internal commitment and buy-in, which increases widespread acceptance and practical use of the vision. Realignment is often necessary in response to changes in the external environment that will affect the organization in either minor or disruptive ways. In either case, stakeholders will need to reattune themselves to the vision to help the organization mitigate the changes.

In some cases, organizations rewind intentionally to get followers on board with a new direction. Leaders often rewind by default because their choice of shared visioning, for instance, fails to launch. Or because the organization fell short of enlisting a critical mass of followers to support a shared vision. Rewinding is okay, and the Vision360 process anticipates it by treating vision as an iterative process that loops around in cycles. Your team may enter a different loop, but the scenery may look strangely familiar. A "rewind" period is not a reset. Rewinding is a chance to begin again and build on the new knowledge gained in the previous loop.

Vision-induced change has not been concretized at earlier stages of the Vision360 process and is still in a malleable or at least crystallized state. For a vision created by an entrepreneur in isolation or with a small group of top leaders, I suggest mentally recalling a time before the vision, mission, or purpose statement was created (or revised) and recreating the vision search experience for followers. This recall could happen through the higher-level shared visioning methods of experimenting, consulting, or co-creating. Before selecting a way forward, consider which shared visioning method has worked best, the scope of vision, vision triggers, level of adoption, and the degree to which the vision is shared among followers. Also, consider these questions to jog your memory and reawaken your visioning experience: *What were you curious about? What feelings and emotions were driving you? What did you want to experience more of? Less of? What was unclear to you? How did your intuition and unique perspective factor in?* Reflecting on how you felt as a leader will build empathy for how your team members may be feeling at this very moment. Remember, they have not had the same experience on the vision journey. They may not have thought much about the organization's future and are likely concerned with performing well in their current role. The urgency you feel for the vision and change in direction belongs to you and those who have had the visioning experience.

Iterating vision and taking another loop can be most effective during such times. The most astute members of your team are likely detecting clues and perking information in either the internal or external environment. If properly channeled, their visceral nature can help the organization to become a better future version of itself. If overlooked, the founder-CEO will be tempted to use their autonomy to drastically change the internal reporting structures, organization design, and strategic direction without adequately engaging team members with tons of organization-specific knowledge.

Technically speaking, a founder-CEO is not required to invite employee input and feedback. But it does make practical sense. People are not inanimate objects that can be managed. Therefore, engaging the people responsible for carrying out changes associated with the vision is highly recommended. Many new businesses are not highly formalized bureaucracies where a CEO can access this information at will. Even when they do, it is difficult to fully capture the wisdom in a system outside of a human-centered process like organization development or whole group discovery. The good news is that as a leader, you can recreate the vision journey experience for followers.

> …visioning is an iterative process, as the formation of strategies and plans may raise questions that in turn make it sensible to revise the vision. (Hines and Bishop, 2015, p. 247)

Call to Action and Pathways Forward

The research question that prompted this book was, "Can an organization learn to see?"

Yes, it can. The preceding chapters explained how, but a new question emerges: "How does learning to see help an organization optimize and perpetuate the velocity needed to sustain vision iteration?" With that question in mind, I want to close this book by suggesting three paths forward for founder-CEOs, researchers, and visionary leaders.

For Founder-CEOs

The role of a founder-CEO evolves as an organization reaches growth milestones. Leaders fulfill various roles and responsibilities in all life cycle phases to translate vision into reality, including discerning activity in the external environment and shaping company culture. The initial vision is a part of that culture. As more team members join the organization, the founder can empower selected followers, granting them latitude to test the vision in a way the founder did in the company's early days. The evolution of founder-led startups, the ability of founders to grow with their companies, and the impact on founder CEOs' longevity are under-researched. Nonetheless, a study found that the most effective incoming professional CEOs minimize disruption using three change management strategies: activating change readiness, creating a shared pathway, and treating the founder's legacy with fairness (Serra & Thiel, 2019). These three actions can be daunting for a founder-CEO who highly values autonomy.

Davila et al. (2010) found that early-stage CEOs in startup companies fail to meet investors' expectations for high growth due to resistance in two areas. First, entrepreneurs resisted switching from managing by personality to a more structured approach. Second, chief executives failed in the timely adoption of management systems to sustain growth. Moreover, organizations that successfully matured beyond the startup phase to become professionally managed experienced significant changes to the design, along with the loss of key talent, sometimes including the founder-CEO (Serra & Thiel, 2019). Founder-CEOs have a leg up over professional CEOs regarding turnaround success, as they favor market-based turnaround strategies (e.g., new product introductions) rather than retrenchment actions such as divestments (Abebe & Tangpong, 2018).

I encourage entrepreneurial leaders to:

- Apply the framework to big "V" visioning in a startup context
- Work toward more follower-centered approaches to shared visioning (i.e., starting points three, four, and five)
- Get people involved through experimentation (Zone 3 and starting point three)
- Develop the emotional fortitude to empower followers for vision testing and decision-making (Chaps. 6 and 9)

Academic Path Forward

Scholars and practitioners are experiencing a paradigm shift in visionary leadership from the twentieth-century paradigm to an approach more suited to the twenty-first organization and leader. Vision360 pulls themes of academic and popular literature together to discuss several broad topics, including leader agency as involving more than communicating vision, the impact of emergence and self-organization, the relevance and benefits of shared visioning, fuzziness about foresight and futures studies, the rise of strategic leadership, and the existence of more startups today than 30 years ago.

Visionary leadership is not meeting the moment. Other leadership and organizational approaches/theories have increased in relevance and popularity. A situational analysis of the external environment reveals game-changing events and current trends in a shifting strategic landscape. Long-term trends such as flexible work arrangements, rampant attrition, effects of globalization, and racial and political tension have been exacerbated by the COVID-19 pandemic and its associated fallout—causing a resurging interest in visioning and visionary leadership. Studies on vision-based leadership have made vision more relevant for twenty-first-century organizations. More work is needed to understand how organizational vision works from a longitudinal and more comprehensive perspective.

The present trajectory of studies related to organizational vision development and realization mirrors the path of strategic leadership scholarship as initially introduced by Finkelstein and Hambrick (1996) and later reconceptualized by Ireland and Hitt (2005). Similarly, the Vision360 concept recontextualizes visionary leadership for twenty-first-century independent startup organizations and new ventures within existing businesses.

Abundant scholarship exists surrounding the science of visionary leadership (Van Knippenberg & Stam, 2014). Vision-based leadership is an emerging area of study. More studies are needed in this area to extend the pioneering work of Kantabutra and Avery (2003) which laid a solid foundation for future development.

Despite the concept of emergent visioning being introduced by Olson and Eoyang (2001) more than two decades ago, empirical studies and scholarship on vision emergence are nonexistent. The five starting points for shared visioning (Senge et al., 1994) have also gone largely unnoticed, with nuances untested.

The concept of vision integration was pioneered by Kohles (2001) and Kohles et al. (2012, 2013); however, a dearth of empirical studies and overall literature exists using vision integration as a construct. Therefore, less is known about the relationships between the concepts mentioned in this book and the impact of followers using a shared vision to impact behavior and decision-making. Future research is needed to explore the relationships between vision integration, organizational commitment, and other significant outcomes. Kohles (2001) also suggested a more comprehensive measure of vision to measure vision diffusion and assimilation beyond the upper echelons, the extent to which "every executive, manager, and employee not only 'share' this vision, but actually integrate it into his or her actual work behaviors and decisions," and the use of proper communication processes (p. 11). Such a measure should include attributes and content of vision statements, vision triggers, conception activities, and the shared visioning method with the most likelihood of yielding positive results based on past visioning experiences.

Follower readiness contributes to the complexity of diffusing a new idea through an organization (Hersey & Blanchard, 1982; Kohles et al., 2013). To date, no studies have addressed this issue. According to the situational leadership model (Hersey & Blanchard, 1982) briefly described in Chap. 2, the telling and selling approaches (Senge et al., 1994) coincide with low follower readiness levels. Future studies should address follower readiness for vision integration and its relationship to vision diffusion. In the majority of vision-related literature:

> Followers are only rarely mentioned in the visioning process, and are often relegated to a largely passive role in vision implementation. Recently, however, scholars have begun to examine the role of followers in enacting or resisting a leader's vision (Carsten and Bligh, 2008; Carsten et al., 2010; Kohles et al., 2012) or more broadly in implementing strategically aligned behaviors (van Riel et al., 2009). (Kohles et al., 2013, pp. 467–468)

Because of the scope of the topic, longitudinal studies on organizational vision development and realization would reveal insights on vision iteration over the life span of multiple organizations.

By combining insights from the four approaches to visioning (O'Connell et al., 2011), Senge's (1994) five starting points for shared visioning, and the situational leadership model (Hersey & Blanchard, 1982), researchers could generate insights to help organizations assess their vision journey. Such an assessment could help leaders determine follower readiness and the best type of shared visioning activities to employ.

The Visionary Leader's Path Forward

The book has focused on using visioning in relatively new organizations, but these principles also apply as organizations age. Established businesses can practice the concept of the 'ambidextrous organization,' maintaining their old business while creating, protecting, and shepherding an innovative company toward maturity and the ability to survive in a new environment (Schein, 2017). The age-old organizational issue then becomes:

> How to turn rampant creativity and innovation into a stable productive system and then, once a level of stability [has] been established, how to recapture some of the innovative capacity that is needed when a mature company faces changes in its technological, economic, and market environments. (Schein, 2017, p. 49)

The challenges ambidextrous organizations manage between creativity and constraint reflect the paradox between future vision and established capital inherent in ambidextrous visioning.

Project and team leads can use Vision360 for small 'v' visioning. The cycle will likely be much shorter for teams and projects, but the principles of Vision360 still apply.

Vision unfolds in loops, not straight lines. The Vision360 process illustrates this tendency. My recommendation to Founder-CEOs, visionary leaders, and new project team leads is to take another loop. If you took the first loop and created the vision in isolation, take a second loop with your team. Some people do not want to be in on co-creation. But their perspectives are valuable, nonetheless. Encourage your people to experiment with your vision. Testing vision works in and out of season and introduces a learning approach for your team to apply the vision to current realities—putting it to practical use each day.

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