

UCSC - DIVISION OF STUDENT AFFAIRS

STRATEGIC VISIONING PROCESS



Designing Our Dream – Shaping Our Destiny

INNOVATION TEAM TOOL KIT

"I use not only the brain I have but all I can borrow."

- Woodrow Wilson



The key to using AI in a strategic visioning process is to identify and align organizational strengths “in ways that make weaknesses irrelevant” (Drucker). Your Innovation Team meetings should create an environment that brings out the best thinking of every member. Following are a few techniques to incorporate into your Innovation Team meetings:

- **Engage in shameless borrowing** – who is “best in class” in the particular strategy or idea you are discussing? How can you learn more? How will you adapt the innovation to your unique circumstances and vision?
- **Identify a “Chief Memory Officer”** – keep your team moving forward and eliminate the rehashing of old ideas or previous agenda items. Have a team member keep track of minutes/decisions/focus areas, etc.
- **Rotate Discussion Leader Roles** – allow everyone a chance to take on a key role. Each meeting requires a facilitator who keeps the meeting flowing and on track (assigned by the AI Planning Team) and a discussion leader who helps the team maintain a rigorous focus and commitment to innovation. Timekeepers and recorders should rotate as well.
- **Balance Content and Process** – nothing kills innovation faster than poor meeting process (imagine a poker chip being thrown into the basket!). Process deals with *how* things are discussed, and content is about *what* is discussed. Here’s the clincher: process is silent, yet it can speak louder than words. To ensure good content, create an agenda for each meeting (preferably distributed ahead of time). To ensure good process, establish ground rules for communication and group dynamics. Also, work together to create an environment in which every team member feels empowered to speak and to accept differing points of view.

Phases of Strategic Visioning Meetings:

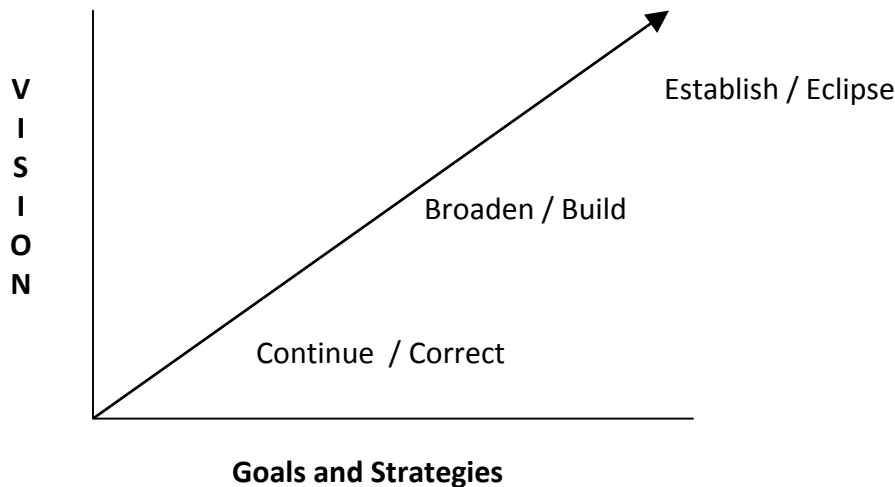
- Phase One: Exploration of the theme
- Phase Two: Align detailed theme and organizational strengths with vision
- Phase Three: Create SMART goals
- Phase Four: Define expectations and set quality standards for performance

Project Timeline:

- February: Kickoff
- March – May: Team meetings and mid-course check-in
- Early June: Appreciative Inquiry Summit to launch the new vision and plan



In your team meetings, try to challenge yourselves to think in bolder terms, thus moving beyond tinkering and actually creating the driving force for innovation in the coming months. Appreciative Inquiry uses the following concepts for bold thinking:



Appreciative Inquiry requires a steady and unwavering focus on the positive. AI is successful when teams have established an abundance mentality. To accomplish this, team members need can-do attitudes and bonding activities. The bottom line is you have to *feel* good to *think* good. Only then can you maintain focus on the positive core and leverage your strengths. Think back to the final exercise at the Kickoff when we discussed Productive Play. It is good to establish productive play as a ground rule and then to be clear about what works for each team member.

If your team is successful, you will have attended every meeting with an intention to add value and “push the envelope.” Your meetings will always have a clear purpose. You will consistently re-frame problems and issues into opportunities for improvement; team meetings will consistently value and encourage diversity of opinion; enthusiasm and creativity will be the hallmarks of every meeting; and people will speak up in meetings (not after) for the good of the team.

*“We truly need a new language
for the kind of change that is hot and alive within us,
and where everything has to re-crystallize around us.”*

- James, 1902

“STRENGTHS DO MORE THAN PERFORM. THEY TRANSFORM.” D. Cooperrider



Some teams may feel it is necessary to begin again from the Discovery Phase to ensure that everyone is on the same page. Following are some helpful hints for using of the 4-D cycle:

Strategic Visioning in the DISCOVERY Phase:

- Establish a positive connection among team members – *usually by starting and ending meetings with each member sharing a positive story from the recent past to start the meeting, and hopes for the future to close the meeting*
- Make an effort to find an empowering perspective, regardless of topic
- Link positive past to the present
- Affirm the sense of the possible
- Cultivate team members' belief in a positive future

Asking good questions is the key!

- Questions that are curious, not judgmental
- Questions that are framed in a neutral or positive context
- Questions that encourage new thought and ideas
- Questions that invite multiple perspectives

Strategic Visioning in the DREAM Phase:

- Create images of possibility
- Give voice to a preferred future
- Affirm the best of what could be
- Describe aspirations rather than “musts”

Fun Team Activity: The Miracle

Purpose: Seeing the university/division with new eyes

You go to sleep one night with a problem or issue weighing heavily on your thoughts and intruding your sense of calm. You finally fall asleep and during the night a miracle occurs and that problem or issue has been resolved for good. When you wake up, what will be different? Describe your mental state. How will you behave differently now that the problem has been removed? What activities or thoughts will you put in its place to ensure that the issue is in the past for good?



Strategic Visioning in the DESIGN Phase:

- Bring the dream into sharp focus
- Support and encourage specificity – ask: “which means what?” to anything that sounds vague
- Identify the thoughts, behaviors, resources, and partners you need to accomplish your Provocative Proposition
- Benefit from the Poetic Principle: that a new reality can be created; an old story can be re-written – you have the power to choose which path your team will travel down.

A way of devising a Provocative Proposition (PP) is the BHAG – a Big Hairy Audacious Goal (Jim Collins, *Built to Last*, 1994). Your team will likely spend a lot of energy creating a BHAG of your theme that is in direct alignment with the new vision. BHAGs or PPs stimulate progress while preserving the positive core. AI uses the term “provocative” to make sure teams are not operating under the “business as usual” mindset. This phase is about the ideal future. Possibly the best example of this concept is NASA’s BHAG in the early sixties to travel to the moon and back by the end of the decade.

Criteria for a Good Provocative Proposition:

- Is it big enough - does it stretch, challenge, or interrupt the status quo?
- Is it grounded – is it a real possibility?
- Is it desired – will your colleagues really want to see it happen?
- Is it affirmative – did you use bold, positive language as if it is happening now?

Helpful AI Technique: Pivoting

Whenever you hear someone offering an idea or action step that is focused on what they “don’t want” to happen in the future, ask them to re-phrase their comments toward what they “do want” to see happen in the future. Or, if you hear a team member identifying a problem, ask them to re-state the problem in the form of a strength. Then discuss how to get there.



Strategic Visioning in the DESTINY Phase:

- Help each other conceptualize the vision and Provocative Proposition in the present
- What capabilities are needed to make your “theme” a daily reality?
- Ask yourselves: do you truly appreciate and believe in the possibilities of your plan?
- Identify ways in which your theme, once implemented, can be measured
- What does someone’s “best effort” look like in the implementation phase?
- What new behaviors need to be habitual for success to be achieved?
- What one thing can each of you do to “act your way” into the preferred future?

Destiny is about action and creating a roadmap for the future. In its ideal form, Destiny is about unleashing and encouraging individual passion for action in service of the vision. A fundamental tenet of AI is its commitment to liberate the creative energy for excellence in all people (Cooperrider, 2002). Finally, the Destiny phase is about identifying action steps that will move the whole organization directly toward the ideal image of the future. Therefore, the #1 result of the Destiny phase is inspired action.

Team meetings in this phase are often characterized by sales pitches. That is, each member brings to the meeting their “proposals for action” by articulating their view of what the action plan should look like for the team theme. Members must explain how their proposed action aligns with the overall vision and how the actions will spark early progress and collective energy. Finally, before an action step is included in any team document, members must agree that it is a behavior/role/task that they themselves are willing to undertake for the good of the process.

Sources: Appreciative Inquiry Team Building, Whitney, Bloom et. al, 2004
Appreciative Inquiry Commons , Case Western University
David Cooperrider, Founder of AI



Developing SMART Goals

*“We want to set the goals that our heart conceives,
that our mind believes, and that our bodies will carry out.”*

-J. Rohn, Business Philosopher

For the strategic visioning process to be successful, each Innovation Team will need to identify approximately three goals for their theme and then “unpack” those goals into manageable action steps. Following is a helpful guide for creating your team goals.

1. Is the goal **SPECIFIC**?

- Does the goal answer the question: “What is the specific end result that will be produced for whom, by what date?”
- Does the goal qualify or quantify so that there is no room for misunderstanding?

2. Is the goal **MEASURABLE**?

- If a goal cannot be measured, it cannot be managed.
- Does the goal clearly express what will be different once it is achieved?
- Are the measurements that will determine a successful outcome specified?

3. Is the goal **ATTAINABLE**?

- Is this goal one that the team believes is a reachable goal, yet challenging?
- Are the names of the departments responsible for the goal’s accomplishment listed?

4. Is the goal **RELEVANT** or **REALISTIC**?

- Does the goal directly support a specific aspect of the vision?
- Will it produce an outcome that will meet university/division performance expectations?
- Will people be willing and able to work on this goal?

5. Is the goal trackable and **TIMEBOUND**?

- Does the goal have a start date and a completion date?
- Can the goal be broken down into milestones and metrics to check progress along the way?
- Does the goal enable timely feedback and corrective action, if needed?

And finally, does the goal have the **“X” FACTOR**?

- Are the people involved personally committed to accomplishing the goal?