



By Ryan Kendall

## **Vision, culture, and climate**

In a [previous post](#), I discussed the importance of developing a shared organizational vision. This idea is not new to our profession. However, when it came time for me to begin the process for my organization, I found it hard to visualize how to do it.

How do units define a vision statement that helps leaders effectively grow an organization? In the following paragraphs, I provide my thoughts on why I think a vision statement is important, how to develop one, what makes an effective vision statement, and my lessons learned from my experience developing a vision statement as a commander.

## **Why Commanders Need a Vision Statement**

When I talk to leaders about command, I always highlight our vision statement. I find myself doing this because it was the one constant of my experience as a commander. It was the foundation of who we wanted to be. It served as a waypoint for our Squadron and a waypoint for me as a commander.

As a commander, this becomes your standing intent. Absent other directions or guidance, a vision statement empowers your leaders to make decisions that grow the organization. Organizational effectiveness in today's operational environment demands decentralized decision making that is sufficiently disciplined without stifling opportunities for leaders to take calculated risks. A vision statement aligns an organization toward a goal and given the right command climate, empowers leaders to move the organization forward.

### **How to Develop a Vision Statement**

This process starts with you before you take the guidon. You have to make time to think about your vision well in advance of taking command. Use this time to answer one overarching question- what do you want the organization to be when you pass the guidon to your successor? This question is difficult to answer. It will take you a long time to distill your answer down into a short, pithy idea that you can easily communicate. Many considerations inform your response. What is your unit's mission? What is the operational environment? What is your command style, etc.?

After developing a draft vision statement, you can begin to solicit feedback. Your Command Sergeant Major (CSM) is a great place to start. The CSM will be able to provide you feedback on your draft vision statement, and your exchange will provide you both an opportunity to shape the organization. If the CSM is already in position, they will be able to give you a valuable assessment of the state for the organization. If you are both moving into position at the same time, this is an excellent opportunity to build your relationship. The CSM's feedback will inform your initial vision statement and your more extensive thought process.

Next, you need to bring the unit's leaders together to turn your draft vision statement into a collaborative product. This part of the process requires you to establish a mechanism that fosters shared dialogue amongst your unit leaders. You must consider many functional aspects. What venue will support small group discussions? What read-ahead material will establish a context for discussions? Who will facilitate the dialogue? How much should I, as the commander, influence the discussions? Below I recount my experience to help visualize

this part of the process.

I chose to do this about a week after taking command, executing a leadership offsite over a day and a half. I included all our senior leaders: CSM, troop commanders, and first sergeants, field grade officers, staff primaries and senior NCOs, special staff, and our senior warrant officers. I provided watch ahead material focused on two themes. First, vision statements (what they are and their importance); and second, warfighting, using a Battle of the Ia Drang Valley documentary to provide context for our discussions.

After some opening comments and an ice breaker exercise, we spent the first part of the afternoon in small group discussions centered on the documentary. I provided a few questions for each to answer (e.g., How would you describe the units in the documentary? What attributes did these units need to be successful?). These discussions did two things. First, they allowed me to see who worked well together, who was hanging back, and who was contributing. Second, it forced people to interact in a small group, helping build essential relationships that did not exist beforehand. We finished the afternoon with each group briefing their answers to the questions. This continued to strengthen relationships through the exchange of ideas. To close, I pitched my draft vision statement and asked them to think about how it aligned or did not align, with the material from our group discussions throughout the day.

The next day the same people met outdoors at a park to continue the exercise. I had them bring lawn chairs, some tables from the unit, and we all chipped in for breakfast. Based on my observations the day prior, I purposefully selected discussion groups for the morning. I grouped different populations who I knew would need to work well together for us to be successful (e.g., staff and commanders, staff, and First Sergeants). I had them first reflect on what they discussed the previous afternoon. Then I gave them time to consider my draft vision statement. I moved in amongst the groups to participate and when necessary, guide the discussions. I did this for two rounds, mixing the groups up each time. After the second round, I had each group present their version of the vision statement.

With each presentation, as a group, we discussed the value of the proposed vision statement. Did it convey what/who we wanted to be? Was it easy to communicate? Did it invoke a positive feeling when you said it out loud? I did not define specific criteria; instead, I used these questions to help guide our discussion.

These group discussions were my favorite part of this exercise, and I believe it was enormously important for our organization. It allowed us, as professionals, to present ideas, defend them, and accept when our approach was not chosen. It demonstrated that as a

commander, I genuinely valued their input and their ideas. Finally, and most importantly, it established a climate of collaboration and problem solving critical for our Squadron.

After the final presentation, I approved the vision statement. I took the opportunity to explain to our leaders why I thought the vision statement was the right fit for our unit. This marks the endorsement of the vision statement and as importantly, it expresses the vision statement in terms of a commander's intent. Your leaders will value the clarity of guidance and understand how you expect them to grow the organization.

The commander's role in this process is an extremely important aspect to consider. As this process evolves, you have to help steer the conversations towards developing a vision statement you believe will be effective. You provide the framework for collaboration but you also serve as the final arbiter of ideas. This requires you to consider what ideas to accept and what ideas to professionally discourage or reject. Give some thought as to how you want to accomplish this task so that you reinforce collaboration and encourage leaders whose ideas are cut.

### **A few thoughts on what makes a good vision statement**

Simply put, a vision statement is what your organization strives to be; a goal for an organization to move toward. To give it a time horizon in Army terms, I viewed our vision statement as what we wanted the organization to be when I passed the guidon to my successor. This time horizon puts your goal far enough in the distance for you to work toward a better form of your current self, but not so close as to be unrealistic.

An effective vision statement begins as an idea of the commander but becomes the shared idea of an organization through a collaborative exchange of ideas between leaders. For our organization, our vision statement's power came from the fact that I did not own it; rather, it was our team's idea. The development of a vision statement as a shared experience empowers your leaders to help you shape and grow your unit.

A vision statement should be something you can say in less than ten seconds. Use clear, concise words that convey meaning and avoid jargon that can be misunderstood. You want your vision statement to be easy to digest, but dense enough in meaning that it provides your leaders with the required ideas and guidance that will help them make decisions.

It should contain elements that nest with your higher headquarters' intent and vision. For

example, if your Division or Brigade Commander has their own vision for the organization, you can incorporate similar language. When we developed our vision statement, the Division Commander used concepts of Ready, Professional, and Strong to communicate his standing intent. Our leaders saw ready and professional as organizational goals and included them in our vision statement.

Finally, you can look at examples from other commanders, but ultimately this has to be something you believe in. It has to fit with your leadership style and needs to start with your thoughts. Otherwise, it will not be genuine, and you will not feel comfortable pitching your idea to your leaders and Soldiers.

### **Lessons learned from the process**

- Pick your venue early and resource it well in advance. I did not, so the first afternoon was in a chapel annex with no air conditioning. Make sure it is far enough away from your unit footprint that people cannot ‘run back to grab something.’
- Make the duty uniform business casual. I had everyone in uniform the first day. Combined with the lack of air conditioning, I had to work a lot harder to keep people engaged. You want people to be relaxed so they focus on the discussion and the sharing of ideas.
- In addition to the leaders I mentioned, have your commanders/first sergeants bring their brightest junior Soldiers. These Soldiers will add valuable perspective, will help you understand what will resonate with Soldiers, and will go back to their formation and share their experience.
- Watch ahead, as opposed to read ahead material, proved to be very useful. It shows you respect leaders’ time and makes it easy for your leaders to digest what they need for the discussions.
- Develop a roll-out plan before you go through this process. You will feel great after this first step but the work is only beginning. Discuss how your organization is going to convey this to your Soldiers. If you do not have a process, all the work you did will only exist with your leaders, it will not become part of your unit culture. Consider branding your vision statement and including it on everything from merchandise, promotion board questions, and counseling statements.
- Over a year, the leaders who were there for this process will switch out. Use the vision statement and culture and climate to assess how the unit is growing. This will enable you to bring new leaders on board and ensure they understand where the organization is trying to go.

- After you develop your vision statement, take the time to reiterate the process and define your culture and climate. I underestimated how important this step was to building our organization. Using the shared vision statement as a guide and having everyone sequestered provided a prime opportunity to define what we wanted. This technique not only created something tangible we could reference but equally as useful, it allowed me to have a discussion with our leaders regarding what was important.

A vision statement is a powerful tool for commanders to lead their organizations. The development of a vision statement as a shared experience with your leaders empowers them to collectively shape and grow your unit. Additionally, defining your culture and climate ensures your leaders understand your intent and that your Soldiers understand what you expect.

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