



BRIEF

Vision and Goals Setting Meetings

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Introduction

An organization's vision is the definition of itself and the expression of its highest aims. It defines how the company's people work to make their dreams a reality. Use Vision and Goals Setting Meetings to bring your vision from the cloudy mountain peaks of inspiration down to a practical application with your Senior Leadership Team (SLT).



Few organizations endure without a strong sense of who they are and where they're going. We outline these guiding principles, which we call Focus Filters, in [Ninety's Vision tool](#) to communicate them to everyone in the company.

A clear and compelling vision keeps your teams focused, aligned, and thriving by simplifying decision-making, goal-setting, hiring, strategy, organizational structure, and so much more.

Creating a vision takes planning and deep reflection. Follow the step-by-step process for creating a compelling vision outlined in our [Vision Builders Workbook](#), then share it with your Senior Leadership Team through a Vision Setting Meeting and a Goals Setting Meeting. The mission? To create a vision your SLT profoundly believes in and the rest of the company is excited to pursue.

Context

Building a company vision takes at least two days, which we split into a Vision Setting Meeting and a Goals Setting Meeting. For best results, space the sessions about 30 days apart.

Each day has a specific agenda and set of goals. While Vision Setting, you'll lay the foundation for why your company exists and what it should look like in ten years. Then, while Goals Setting, you'll plot the big steps to get from here to there. If you're working with a coach, they'll guide you through this process and support your team.

The objective is to have the entire Senior Leadership Team agree and commit to the pillars of the vision. Once [agreements](#) are made and commitment is established, the organization can focus on what needs to be done to get from here to there.

We know your time is valuable, and your plate is pretty full. However, as experienced coaches, investors, board members, and company builders, we promise the two-day commitment will be worth it.

Stepping away from our daily responsibilities to plan for the future was something we should have done years ago. Identifying our Ideal Customer and Core Values alone will help us navigate the next year with more clarity. I'm excited to share the rest of our vision at our next State of the Company.

MIKE FEAZEL

CEO of Roof Maxx

The Vision Setting Meeting

This session asks you to answer essential questions that frame the day's work and potentially outline the next decade of your company's path. Here's our agenda for a great Vision Setting Meeting.

AGENDA

1. **Check-In.** Connect with the team on an interpersonal level and mentally check in to the meeting. Then, explain the purpose of this Vision Setting Meeting and set expectations for the day.
2. **Industry and Niche.** What industry is the company in, and what, specifically, do you do to set yourself apart in the marketplace? This might sound simple, but documenting an agreed industry and niche will save huge amounts of time and money in the long run.

3. **Ideal Customer.** Some customers will be a joy to engage with, while others will be a drain on the business. Identify the attributes of your [Ideal Customers](#) to attract them to your company.
4. **Compelling Value Proposition.** We attract our Ideal Customers through a [Compelling Value Proposition](#) (CVP). The four most common CVPs are having the lowest cost, improving lives through innovation, providing extraordinary customer service, and increasing actual or perceived status.
5. **Core Values.** Capture three to seven essential traits everyone in the company needs to possess for you to love working together. Hiring, reviewing, and firing by your Core Values promotes a [high-trust environment](#).
6. **Compelling Why.** Compose a short, easy-to-understand statement of what the company does to improve people's lives – the purpose, passion, and/or just cause that form your [Compelling Why](#). Our maxim? We don't make money because we want to make money; we make money because someone values what we do.
7. **Compelling and Audacious Goals (CAGs).** [Set one or two goals for the future](#) – think 5 to 20 years from now – that are so bold they'll inspire people to move mountains. Consider JFK's "man walking on the moon" goal from the 1960s as an example.
8. **Next Steps.** Talk through what remains for the team to do. Ask them to continue thinking about today's work until the next session.
9. **Conclude.** Review the progress you've made and revisit expectations to ensure the session met them.

The Goal Setting Session

Now that your team is aligned behind a unified Vision, it's time to determine the steps required to make it a reality. Here's our agenda for a great Goal Setting Session.

AGENDA

1. **Check-In.** Reset everyone's intentions.

2. **Review your Niche, Ideal Customer, CVP, Core Values, Compelling Why, and CAGs.**

Take time to consider the foundation set during the Vision Setting Meeting and discuss any thoughts that have occurred since then. This exercise should result in the components of your vision becoming a set of sacrosanct Focus Filters — the guiding principles for everyone in your company.

3. **3-Year Goals.** Identify what needs to happen over the next three years to accomplish your CAGs, striving to strike a balance between obtainable yet challenging goals. Paint a picture that helps everyone in the company get where you're going and see what's most important.

4. **1-Year Goals.** With the 3-year goals laid out, decide what needs to happen in the next year to be on track to turn your CAGs and 3-year goals into reality.

5. **Rocks.** Determine what needs to be done in the next quarter to move toward the CAGs, 3-year, and 1-year goals. These are your **Rocks**. Make them SMART, then break them up into Milestones, which eventually turn into To-Dos that inform how to prioritize time and decision-making weekly.

6. **Issues List.** During these two days, you'll likely generate a variety of discussion topics — we call these **Issues**. Now is the time to prioritize and hold those discussions, develop solutions, and create To-Dos to address them.

7. **Next Steps.** Ensure that someone is accountable for each To-Do (and any other action item). Make sure they have complete information on how to accomplish the task.

8. **Conclude.** Provide feedback on the day, rating the meeting on a scale of 1 to 10.

Core Disciplines of Great Vision and Goal Setting Sessions

1. **The first time you sit down and put any aspect of your vision down on paper (or into Ninety), things will not be perfect. That's normal.** Strive to earn the SLT's agreement and commitment to your new vision and goals around 90 days after the Goals Setting Meeting. That said, we recommend revisiting your 3-year and 1-year

goals at least once a year and everything else quarterly. Creating goals is a process, not an event.

2. **The entire company should have access to the vision.** Team members make better, more informed decisions when they understand and embrace the components of the vision and use them as Focus Filters to align daily work with long-term goals.
3. **Your vision and Focus Filters should be the foundational tenets of why people choose to work for your company.** Take the vision seriously, and you'll find it easier to attract and retain the [right people in the right seats](#). Those are the people you want to work with.

Hopefully Helpful Hints

The Vision and Goals Setting process is always ongoing. Even though the goal is to create an enduring Compelling Why and timeless Core Values, you may find that changing winds require new sails. When changes need to be made, capture them in the Long-Term Issues list for discussion at the next [Quarterly](#) or [Annual](#) Planning Meeting.

Ensure that your CAGs, 3-year and 1-year goals, and [Rocks are SMART](#). Use the specific, measurable, achievable, relevant, and time-bound framework to create more powerful goals that are more likely to be achieved.


If your company consults a coach or advisor to help you master a specific [business operating system \(BOS\)](#), now is an excellent time to get them involved. When a neutral, experienced coach runs the meeting, they can take some of the bias out of the air, help you see what's going on, and help negate the HiPPO (Highest Paid Person's Opinion) effect as well.

Takeaway

Going through the Vision and Goals Setting Meetings step by step will drastically enhance your ability to create an extraordinarily focused, aligned, and thriving organization. First, get the leadership team on the same page, then share the components of the Vision with the entire organization at least once every 90 days during your [State of the Company](#)

Meeting. When everyone understands where the ship is going, how to get there, and [how they fit in it](#), they can easily understand how and why they matter.

What's next? Visit the [90u Library](#) or [try Ninety today](#).

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