UNIFIED VISION: HOW USING VISION AS A UNIFYING FORCE CAN INCREASE RESULTS AND VALUE FOR PORTFOLIOS, PROGRAMS AND PROJECTS

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ABSTRACT: COMPANIES TODAY ARE LOOKING FOR PROJECT TOOLS AND METHODOLOGIES THAT WILL INCREASE RESULTS AND VALUE. THE AUTHORS HAVE FOUND THAT THE PROPER USE OF VISION AS A UNIFYING FORCE WILL DRIVE EXPONENTIAL RESULTS FOR PORTFOLIOS, PROGRAMS AND PROJECTS. THEIR FRAMEWORK, TESTED AND SHOWN SUCCESSFUL ACROSS THE WORLD, CREATES A TRULY VISION FOCUSED CULTURE WHERE GOOD PEOPLE ARE FREE TO CREATE OUTSTANDING VALUE.
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Unified Vision

1 - Introduction

“For without a Vision the people are unrestrained.” Ancient Proverb

“The function of leadership – the number-one responsibility of a leader – is to catalyze a clear and shared Vision for the company and to secure commitment to and vigorous pursuit of that Vision. This is a universal requirement of leadership.”

Jim Collins in 1992 on page 4 in his book Beyond Entrepreneurship

If you are not governed by Vision, then you will be tossed about on the stormy waters of circumstance.

In 1992 we (the authors) had independently arrived at the same conclusion and described this idea in the Unified Vision Framework that Vision is the key driver for everything that happens in a business. For the Executive, Senior Management, Management and Team levels a clearly defined Vision needs to cascade to every level of a company. Each level then needs to link its own Vision back to the level above it and to the overall Vision of the Enterprise. It is not enough to have a Vision statement. An adaptation of a Japanese proverb captures this rather well, "Vision without implementation is mere fantasy. Unfocused activity without Vision is truly a nightmare."

2 - Vision-driven

Every level needs to also distill agreement and gain buy-in with its stakeholders. Having clearly defined Purpose, Mission and Vision statements and distilled agreement with the stakeholders exponentially enhances the ability to deliver the Vision and to do it more quickly.

This has been seen occasionally in the literature related to Project management, for example “while the Project management literature appears to be dominated by the importance of techniques used to manage Projects, there is a noticeable gap in the literature relating to the impact of Project leadership and the development of a Project Vision that unites Project teams and supply chain partners as a critical success factor for Projects.” Page 8 Understanding the Role of Vision in Project Success by Dale Christenson and Derek Walker in The Project Management Journal September of 2004. Also, Dr. Les Labuschagne and Carl Marnewick in their 2006 paper A Structured Approach to Derive Projects from the Organizational Vision in the same Journal details how Vision should instruct how Projects are selected, managed and reported. However, it is by no means the norm. For example, you will not find Vision mentioned in A Guide to the Project Management Body of knowledge (PMBOK Guide) 4th Edition and this is the ISO Standard for Project management world-wide.

Project management for most of its professional life has been relegated to the land of detail driving efficiency. There has been more chatter in recent years about how Project, Program and
Portfolio management is becoming more of a strategic part of the enterprise structure. If this transition from operational to strategic is to occur, and we agree that it should, then we need to organize and communicate through the lens of Vision because that is how strategic people organize and think. Peter Drucker once stated, “Efficiency is doing the thing right, but effectiveness is doing the right thing.” If all we are doing is effectively driving details without linking our activities to the over-arching Vision of the company then we remain operational and not strategic. In a perfect world Executives want every division, every functional area, every Project and every person making decisions at their level of authority based on the ‘right thing’. They want efficiency but efficiently doing the wrong thing is still the wrong thing. The degree to which we succeed at delivering and communicating this story is the degree to which we will be allowed to sit at the strategy table.

We recently heard of an excellent example of this successful transition of a PMO to the strategic level in West Michigan. Gordon Food Service, an 8 billion dollar company in Grand Rapids run by the Gordon family, a short time ago added a Chief Strategy Officer to their Executive Team structure. The PMO (Program Management Office) reports directly to the CSO. Perfect.

Your company may not have a CSO and may not realize the importance of Vision at the Project, Program and Portfolio level but that does not prevent you from organizing the PMO and individual Projects based upon this understanding. The more effectively you accomplish this linkage the more you and your PMO will be considered a strategic partner within the company.

3 - Define Vision

Ultimately, all organizational life and function revolves around definitions. What is our Purpose? What is our Mission and Vision? What are the strategies and goals that we are pursuing to accomplish these ends? Without a clear definition there is no focus. It is like the old joke where the man mounted his horse and rode off in all directions or the ancient maxim that every man does what is right in his own eyes. Or, as Benjamin J. Parker from the article Strong Vision Creates Strong Project Teams in PM Network Magazine July 2000 observed “a Project team without Vision will quickly degrade to a random grouping of people attending the same conference calls.”

The 4D Model (Define, Distill Agreement, Deliver and Drive) organizes the plan and drives success. It is the compelling core of the Unified Vision Framework because without the iterative operation of this process the Purpose/Mission/Vision can remain unclear and operational focus and delivery scattered. Continuous reminders of the Purpose/Mission/Vision are needed because we are working with people and, as we will demonstrate below in the section on “Why Simple is Better,” people forget.
The 4D Model, by the way, is a methodology agnostic business leadership framework that strengthens and accelerates any (project management) methodology to which it is applied.

Kent Crawford states in Chapter One of *An Inside Look at High Performing PMO’s* that there are three central formation themes that are found in the applications of PMO of the Year Finalists for PMI:

1. **Use a Standard Language.** This can mean something as simple as a shared lexicon for working on Projects (in which terms like “plan,” “schedule,” and “requirement”) have been precisely defined. At the other end of the scale, it can mean a methodology or multiple methodologies that connect industry best practices with Project management standards.

2. **Educate Broadly, then Deeply.** Smart PMO leaders train widely: giving support staff and line managers and executives the basics of Project management to build supportive organization around the PMO, then focusing training on the Project managers and staff to bring their practice in line with the requirements of the organization.

3. **Collect Data Rigorously.** Most, if not all, PMO leaders today realize that the value of the PMO must be quantified. We believe these themes do indeed reflect why a PMO would be successful and we would add that the methodology mentioned in bullet number one for us is the Unified Vision Framework (UVF). The degree to which we succeed in obtaining clear Definitions and Distilled Agreements between all Project stakeholders on the Purpose/Mission/Vision of the Project and the definition of success is the degree we are able to measure and prove value at the end of the day. In other words, if #1 is done poorly then #2 is difficult and #3 does not matter. Whereas, if #1 is done well then #2 and #3 can follow naturally and will be accepted and agreed to by all parties. We use the language of Vision to establish agreement, manage change and ultimately prove and communicate value.

The core driver for us in working on any Project or Program, particularly at the Enterprise level, is the language used to describe what we are doing and what we are trying to accomplish. Clarity of language is hard, continuous work but it is also, in our opinion, the platform for all success. If you cannot describe what you are doing and trying to accomplish in simple language that everyone gets and agrees to then you are severely reducing your odds of achieving your goals. Dr. Frank Luntz on page 134 in his book *Words that Work* says it this way, “For words to have real impact, the public, at an absolute minimum, has to know what they mean – and how to say them and repeat them. If they don’t, or can’t, it is hardly a recipe for success.” We find this is
even truer when finding the language needed to construct and communicate effectively as a Project or Program leader or in creating an Enterprise PMO regardless of methodology. That being said, we need to give you some of our definitions so that we can communicate clearly through the balance of this paper.

4 - Culture of Vision

Culture is the most difficult part for an organization to create and/or copy. A company that understands the need to change and chooses, for example, to go Agile, will already be five to seven years behind in the game. For example, if one company has a 36 month cycle to bring a new product to market and one of their competitors can do the same in 12 months, by the time the first company gets to a 12 month cycle, the competitor will be now at 6 months or even 3.

The competitor that is ahead in the game has the luxury of being proactive in their process improvements. The company that is behind will most likely be in a reactive mode. But, being reactive will most likely lead to the demise of the company. The company that is behind will need to be pre-active. That is, they need to create a Vision that will, in the next 3 to 5 years, position themselves ahead of where their competition will be. So, how do you do that? Daniel Burrus, in his book “Flash Foresight” had the following Seven Flash Foresight Triggers:

- Start with Certainty – use hard trends to see what’s coming
- Anticipate – base your strategies on what you know about the future
- Transform – use technology driven change to your advantage
- Take your biggest problem and skip it – it’s not the real problem anyway
- Go Opposite – look where no one else is looking to see what no one else is seeing and do what no one else is doing
- Redefine and reinvent – identify and leverage your uniqueness in powerful ways
- Direct your future – or someone else will direct it for you

For the balance of this paper, when we use the word Vision we actually are talking about all of the following definitions for Purpose, Mission and Vision combined with Core Values and Beliefs working in concert to give life and direction to an organization:

- Vision Statement – this states what we want to be
- Mission Statement – this describes the business we are in
- Purpose Statement – this explains why we exist
- Core Values & Attitudes – who we are and what we passionately believe
- Goals and Objectives – These break the Strategies down into specific, measurable items that can be near term or long term in nature
All of these form Vision through Goals & Objectives work together to create, shape and form the culture of the organization. If the culture doesn’t change, then the organization cannot change.

5 - Cascading Vision

We have used a cascading structure to construct and manage Projects and PMO organizations for decades and we began talking about Vision being the compilation of all the underlying parts in 2000. Last year we found that Jim Collins (author of *Good to Great* and *How the Mighty Fall*) used a very similar model to describe how a company could move from a start-up to an enduringly great organization. His model is very good but only includes Vision, Strategy & Tasks. It can be seen in *Beyond Entrepreneurship* on page 48.

“The goals of the organization are best met when the goals of the people in the organization are met at the same time.” Max DePree, former CEO of Herman Miller, page 23 of his book *Leadership Jazz*

The technique we use to maintain the unity of Vision throughout the organization is by cascading the Vision. We do this with a series of strategic planning meetings where we take the Vision of the organization (almost every organization we work with has a Mission statement or a Vision statement that can be used as a starting point) and then work with each functional area or Division to create their own specific Purpose, Mission and Vision statements that aim at the over-arching
goals of the entire organization but are specific to their team or area. We then show the company how to construct a Purpose, Mission and Vision Statement for each Project and ultimately how to encourage these statements at an individual level. By following this process you gain alignment, or unity, from the individuals performing tasks to the re-prioritization of strategic initiatives by the Executive team and it is clear up and down the organizational chart how it all fits together. You can visually see how this works from the “Stadium View” figure below.

An example of how this can function effectively is the work we did with Bethany Christian Services, the largest adoption agency in the world with 1,500 employees in 90 locations. Bethany’s Vision Statement states “We envision a world where every child is in a loving home.” As we worked with the various functional teams within Bethany to create cascading Purpose, Mission and Vision statements the Development Team result truly stands out. In the Non-Profit world the Development group is the fund-raising team. Thus, you would think that the mission, or business that they are in, would be related to raising money to fuel the organization needs and goals. The Mission statement created by the team stated; “Connecting Resources to Vulnerable Children.” Succinct, elegant and right on the mark for what they are trying to do as a team. The Vision statement, what they want to be, was equally good; “To Model Exceptional Giving.” As a team they felt that they needed to be models of the type of giving they were asking donors to participate in. This in turn would generate results because their work effort would spring from the reality they are living and modeling. I trust you see how this allows the functional area to live the Organizational Vision within the context of what they are tasked to deliver in their function. Thus, a cascading Vision that is different from the main Vision feeds the ‘why’ of the functional areas with the core meaning of the True Vision of the Enterprise.

We then create a Purpose, Mission and Vision statement for each Project. It has to capture in a short phrase how this Project will fulfill the Purpose, Mission and Vision of the team and the functional area and the entire company. All of the Vision statements are listed in the Project Charter and the Project Mission and Vision Statements are in the header for all Project documents so that the team is continually reminded ‘why’ they are delivering on the tasks they are working on. As Max DePree said, “All of the Visions, all of the strategies, all of the implementation, all of the day-to-day operations, are carried out by one potential water carrier or another, always working in concert with, or in need of, another water carrier.” At Herman Miller a water carrier is the person delivering on a task. We need our water carriers to understand, believe and own the Vision to such a deep degree that their decisions reflect and contribute to it.

To again quote Dr. Luntz (pg 70), “While the study of the impact of language may be a science, the actual creation of effective communication is an art.” Amen. It is truly simple. It is just not easy.

6 - The Four Visions

There are four types of Vision that exist in any organization. And they all need to be understood and dealt with properly to arrive at true Vision. The four types are:

1. True Vision
2. Stated Vision
3. Implied Vision
4. Actual Vision

First, we need to understand true Vision. The true Vision is the sweet spot inside the organization on which the executive should actually be focusing. The sweet spot has many names: “competitive advantage,” “hedgehog,” “purple cow,” “unique selling proposition,” and so on. Distilling the definition of a true Vision can only happen over time and emerges from the pressure cooker of disagreement, where all opposing views have been aired, evaluated and the combination of the best parts of each idea creates the true Vision. The true Vision statement, once it has been Distilled, should then be crafted into a short phrase that is easy to remember and even easier to communicate.

Every company goes through the process of creating the stated Vision that they share with the world, the “official Vision” of the organization. So the true Vision should shape the stated Vision:

However, if you were to take the top executive team from your organization, put them in a room, and ask each one write the Vision statement from memory on a piece of blank paper and then compare the results, you would probably find as we have that there would be twelve different versions of the stated Vision, even if only ten people were in the room. Why is that? Because almost without exception the stated Vision is too long, generic and doesn’t reflect the true Vision. The stated Vision may be printed on slick glossy paper, but that doesn’t make it true.
It is also because there is another dynamic at work and it’s called **implied Vision**. The implied Vision is the reflection of each leader’s walk. If a leader’s walk and talk match, then the implied and actual Visions will converge with and match the true Vision for the organization:

**Implied Vision should align with the Actual Vision**

But, in most organizations, this is where the walk and the talk diverge from what’s printed in the marketing brochures and reality. An example would be if we state “quality is job 1” and yet our product never has the best quality record, and the people in the organization never see any leadership support for increased quality, then the stated Vision is not reality.

Everybody sees the disconnect and the result is that if you have good people, they will try to figure out, as best they can, what the true Vision is and align themselves to that Vision. So, if the stated Vision and the implied Vision do not line up what do you have? An **actual Vision** that is **fractured**:
If the Implied Vision doesn’t align with the Actual Vision, then it is Fractured

Allowing broken implied Vision(s) at the leadership level to go unchecked produces a **fractured Vision** for the company that is out of balance and splintered. When the actual Vision is created by organizational dissonance and division (i.e. “division” means two visions) we find that ‘every person does what is right in his or her own eyes’ becomes the norm. You have as many Visions as you have people. And this may or may not line up with what is best for the organization.

More often than not it becomes the ego of the leaders that determines what is prioritized and the team ends up having to resort to personal heroics to save the day. Others resort to defensive (“CYA”) task management in order to mitigate the effect that the fractured Vision has on them. An example of this is when you have put your and your team’s full effort to comply with and deliver according to the stated Vision, but then you end up being punished by the organization for doing what you thought was the right thing. This is unjust behavior and the team and the leadership knows it. This demotivates future endeavors and kills innovation. Max DePree, again on page 130 of *Leadership Jazz*, is accurate in his assessment when he states, “Unjust leaders paralyze their followers.”

Paralyzed and still trying to do the right thing but the activity which they assumed lined up with the stated Vision did not line up with someone else’s actual Vision or ego. A fractured Vision also might be the result of some undeclared tribal war or just an unexplained “that’s the bottom line” but the result is the same; trust is broken and full effort dies.

Whatever a team has determined the organization’s true Vision to be is what they will use as their actual Vision and this will shape their decision making and change management choices negatively and cripple what may be an otherwise excellent team. It is the consequence of their best guess of what the true Vision should be and expending the effort to re-align with the new understanding.

Jim Collins, on page 6 of *Beyond Entrepreneurship* explains the dynamic this way: “The most important element of leadership effectiveness is authentically living the Vision of the company. The values and ambitions of a company are not instilled entirely by what leaders say; they’re instilled primarily by what leaders do. In a healthy company, there are no inconsistencies between what is said and what is believed deep down – the values come from within the leaders and imprint themselves on the organization through day-to-day activity.” When inconsistencies are exposed people adapt and try to figure out what the true Vision is. Inconsistency is death. The result is cultural chaos.

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Then, just to keep things interesting, every six to twelve months companies roll out new strategic initiatives or reorganizations. And, sometimes, they even roll out a new Vision statement. Over time the strategies migrate into something that has little, or nothing, to do with the original stated Vision of the company. This creates organizational Vision fatigue and the leaders just can’t seem to understand why people deliberately choose to ignore their directives. Sometimes companies will even bring in a new leader from outside the organization in order to try to shake things up and break the resistance to the behavioral changes that are needed to renew the culture. According to the research conducted in “Good to Great,” bringing in an “outside change agent was negatively correlated with a sustained transformation from good to great.” This could be due to the first line of management that reports directly to the new leader end up circling the wagons and present a united front that neutralizes the leader’s ability to create the positive change that was desired. These company antibodies are the dark side of a unified Vision.

When this happens, a leader may be tempted to make the mistake of invoking the power of their position to effect change rather than using personal authority to lead. For example, a leader can use the power of the position and demand a 20% across-the-board cut in all Projects that are in the pipeline without realizing that some of the most critical Projects (necessary for the survival of the organization) could end up being killed because they weren’t linked to the true Vision. If you don’t know what the true Vision is, then Projects that are linked to the true Vision can be cut for personal or political reasons. We call this the “unencumbered by knowledge, we acted…” phenomena.

The use of power to motivate tends to slide down the slippery slope toward the Theory X style management that uses fear and intimidation as a motivator. And while it may never be actually stated by the people being led, the more that power is used to demand change, the more fear rises as the true motivator. Studies have shown that fear as a motivational tool is only useful in short time frames and crises situations. Long-term use of fear as a motivator destroys innovation and effectiveness. It also bogs down the speed at which the organization can react and adapt to changing market conditions.

Dwight Eisenhower once said, “It is always easier to pull a string than to push it.” This is what we mean by leading from personal authority. Whether it’s by serving, which is the definition of a Level 5 leader in “Good to Great,” or by demonstrating with words and actions your alignment with the true Vision, leadership from authority always achieves the best results. Authority energizes the intangible assets inherent inside every organization. These exist in the white space of the organizational chart. When a leader pulls the intangibles together by means of a cohesive, true Vision that is lived by the entire team, then exponential results are the natural outcome.

Still, a charismatic leader can have a clear understanding of the company’s true Vision, lead from authority and fail to achieve the desired results. How can that happen? By assuming agreement. It is essential for each and every person to buy-in to his or her part of the true Vision. Leaders understand that the first step to gaining agreement with any team is to have clear definitions upon which everyone agrees. When the definitions are in continual flux, it becomes difficult for team members to focus. This is why clear Purpose, Mission and Vision statements are needed at the

2 Ibid
function and Project level. When the definitions are clear-cut and agreement has been reached, then distilling the tasks into a cohesive result becomes almost effortless and fast adaptation to changing conditions becomes easier and less stressful.

If power is used to force agreement, then the person performing the tasks has no option other than to complete the task as defined by the boss. Creativity is killed. Team members no longer come up with creative solutions to execute the tasks quicker, with less effort and with greater impact. Conversely, if personal authority is used to gain agreement and thus inspire the completion of the tasks, then people begin to recognize that the leader is there to support them in achieving success for the entire team. Options are examined and inspired solutions are revealed.

So far we’ve identified three mortal leadership sins (i.e. not walking the talk, leading from power and not authority and assuming agreement) that can derail even the most adept and agile of leaders. Understanding these root causes is a great place to start, and frankly they have to be addressed and dealt with in order to obtain and maintain organization strength and excellence. In the process of addressing these core organizational challenges a PMO can control and accelerate the Project portfolio. If you have a model or framework that is short, memorable, and remarkable and that is linked to the true Vision, then it can become an effective tool for prioritizing Projects as well as managing them and the enterprise.

The reason a simple model or framework is most effective is because of the natural dynamic of change. It doesn’t matter what your Project structure is today, you can be certain that tomorrow the market’s going to change, the customer is going to change, resources are going to change, financial components are going to change and leadership is going to change. If you have a clear, true Vision, and this is reflected and articulated throughout the company down to the task level then any changes that occur at the any level can be quickly aligned back to the true Vision. Conversely, if your Vision is ill defined, not memorable and unwieldy, then the Projects in your portfolio will certainly still change, most likely in a negative or unproductive way, as people try to guess how the change fits the actual Vision. But, alignment becomes unlikely.

If you are not led by Vision, you will be tossed about by circumstance

So, what are we saying? It’s as simple as walking the talk and not just talking the talk. Talk is cheap. If your actions speak so loud that your team can’t hear what you are saying, then it’s time to take a step back and look in the mirror. So make sure you take the time to identify what the true Vision is. Articulate what that Vision is for each of your functional areas, the Portfolios, Programs and Projects and then lead by example. Do the work. Do your homework. Spend
more effort with definitions and agreements that link to the true Vision. Use the true Vision as a tool to manage and lead all Project efforts and the creativity needed within the Project teams will rise and amazing results will occur. Using the Unified Vision Framework, or any other Vision clarifying model, and applying it correctly will create a truly Vision focused culture where good people are free to create outstanding value.

When Vision is in Balance, Cascading it through the Organization becomes Natural

All of the above discussion falls apart if the leaders or the team members do not believe that the Vision is true or that it is true for them. The nuclear fuel of a clearly defined Vision is belief. The team must believe in the Vision and its ultimate success for Vision to work. They won’t believe it if you don’t demonstrate it with your walk.

Ultimately it comes down to leadership and Jack Welch, former CEO of General Electric summed it up this way, “Good business leaders create a vision, articulate the vision, passionately own the vision, and relentlessly drive it to completion.”

7 - Why Simple is Better

When we work with Executive Teams to help clarify the Purpose, Mission and Vision of the organization we always begin with the exercise we mentioned in section 6 above. We give everyone in the room a blank piece of paper and ask them in sixty seconds to write out, from memory, the Purpose, Mission and Vision statements of the company.

We have done this exercise with over fifty companies in the past and not one group succeeded at knowing the statements word for word. In fact, the usual result has been multiple responses none of which are the statements published by the company which we have printed in advance.

Why is this important? An old Greek proverb states that “A fish stinks from the head down” or in other words if the leaders do not get it then the troops will not get it.

We have found over the years that for a statement to be memorable and communicable within an organization it cannot be longer than seven to nine words. Our preference is five to seven. Let’s demonstrate this. Here are two statements we drew from a couple of company websites:
1. Our mission is to satisfy the needs of our customers through wholesale distribution. We strive to be, and to be viewed as, the highest value provider of such products and services in the market in which we choose to compete. The major resource behind our success will be our high-performance team of associates who will share in the financial benefits of this success.

2. The mission of the company is to:
   - Promote the best interests of the company and act as an advocate in company issues.
   - Promote and protect the integrity of the company plan.
   - Ensure that the business opportunity today is as good or better for future generations.
   - Act as an advisory group to the parent company.

Now, turn this paper over and try to remember any part of the Vision that you just read. Unless you are blessed with a photographic memory then you probably caught a few words and the rest is off in the mist and gone.

Next, let’s look at Nokia’s Mission statement (remember, mission is the business you are in):

   - Connecting People

Now turn this paper over, again, and try to remember what you just read. The vast majority of you turned over the paper and said “Connecting People” because it is short and memorable. It also clearly articulates a mission that can change and adapt as the market morphs because it is not tied to a specific technology or device. If Nokia had stayed myopically tied to its original mission it would still be in the lumber business but its mission statement today is highly effective and communicates within and without the company what they are trying to do.

Short and accurate is always best. It can be hard work getting to that point but it is necessary effort whether you intend to move a Project or change an organization. However, just because it is brief does not mean it is clear. Do not stop until you have language that is both terse and clearly communicates. We need this because as humans we tend to forget and many times what we remember is wrong.

“A mind is a terrible thing to waste” has been the slogan for the United Negro College Fund for many years. We would like to take this phrase and twist it a bit for effect and to make our point regarding the need for continuous reminders. In this case it should read “a mind is a terrible thing to trust”. What do we mean? Rudolph Flesch, PhD in his book *The Art of Clear Thinking* talks about how ineffective and errant our memory is, even immediately after observing the event or reading an article. Our minds tend to ‘fill in’ details that did not exist to map the data to our beliefs. This is a true dynamic that must be considered in all human communication; things are not as clear as we think. We need to remind ourselves often ‘why are we here and why does it matter’ or other competing ideas and priorities rise up and take over.

If this is true, and we believe that it is, then why all the worry about definitions? This is precisely the point. If our starting point is unclear communication then extra effort and ongoing effort is required to create and maintain organizational unity. It is not automatic and can never be assumed.
8 - Start Where You Are At

“You can’t build a reputation on what you’re going to do,” was a very wise observation from Henry Ford. You may be reading this paper and thinking “these are great ideas,” but not acting on them would be unfortunate. We have heard back from people we have trained that they took the framework back into their work environment (from Project to Enterprise level) and began to see organizational results the very next day. It does require that you act. Start. You do not have to try to boil the ocean. Look at the realm you live in and determine where to start. Create a VSPT (Vision, Strategy, Projects and Tactics is elaborated further in our White Paper on Enterprise Agile that can be found on our website) at the level you own, work on clarifying the Definitions within your current company. Distill Agreement by linking it to the Enterprise Vision and once you succeed migrate that success to the next Project or Program.

If you are leading a Project then take the Enterprise Vision and mission statements and place them at the top of your next Project Charter. Then, before you do anything else, craft a Purpose, Mission and Vision statement for the Project. It is best to create this with your team but at a minimum create one and then show the team and work with it until you have agreement that “yes, this describes the Project Vision and we agree this is what we are going to do.” Add the statements to the artifacts you use to manage the Project and refer to them often, particularly when a change occurs. We require any change to go back through the Four D’s of the framework to make sure that the change does not alter our Definitions or Distilled Agreements and that all appropriate stakeholders agree with that assessment (or the approved alterations to the plan). This maintains unity within the team and toward the Vision of the Enterprise, functional area and Project.

9 - Conclusion

If you have responsibility for developing or running a Company, Program Management Office (PMO) or Project, then use the Unified Vision Framework to organize and manage the flow of this effort. It will give you the tools needed to communicate at the strategic level and to manage the various teams down to the task level. Keep it simple and remember that it is not easy.

Finally, one of the most important reasons you need a clear understanding of the organizational Vision and how it applies at the Portfolio, Program, Project and task level deliverables is the effect it has on decision-making. If Project Management is to be viewed as a strategic addition to an Executive Team’s tool kit then it must communicate in the language of that Team. Executive language will always revolve around Vision. A properly functioning PMO will thus construct its own Purpose, Mission and Vision statements that align with the company Purpose, Mission and Vision. We call this a “cascading Vision” and that Vision should inform decisions down to the smallest task allowing our work to be effective in addition to efficient. When communicating why choice ‘A’ was picked over choices ‘B-G’ it should be described through the prism of that Vision. This allows continuous alignment and maintenance of unity, freeing people to make good decisions based on the clear Vision.

The results speak for themselves.