



XM Performance Vision Planning Guide

Use this form to brainstorm key pieces of your vision before you try to write the story.

Step 1: Tangible, measurable goals

Revenue, Gross Profit, etc.

New Clients

Growth to the team

Anything you can get a number on from 2020 and track improvements

Step 2: Intangibles

How are your values turning into culture?

What positive impact are you having on the world around you?

How a passionate and energized team feels

Step 3:

In bullet style, brainstorm some of the key things you would like to accomplish.

Step 4: Tell the Story

2-4 paragraphs, start like this:

On Dec 31st 2021, our company will be celebrating our best year ever....

Now tell us what happened in the past tense voice.



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I. Vision:

“Good business leaders **CREATE** a vision, **ARTICULATE** the vision, passionately **OWN** the vision, and relentlessly **DRIVE** it to completion.”

-- Jack Welch

- Collaboratively created, listen to all players, input precedes buy-in
- You must dream big to inspire, but do not create delusional fantasies
- Weave in strategic measurable goals with intangible cultural story telling
- Hands and feet follow the heart, appeal to the heart first
- Do not make it all about money

Tangible, Measurable Goals	Intangibles, look, feel, attitude, etc.
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Tell the Story:



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