**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 2021/2022 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, 2025, our company will be celebrating our best year ever…*

Now tell us, what happened in the past tense voice.

**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 strategic measurable goals with intangible cultural storytelling.
* Hands and feet follow the heart, appeal to the heart first.
* Do not make it all about money.

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