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Vision Casting

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February 17, 2019

I am closing in on my sixth year of selling my purpose. I sold my CPA firm before I reached the age of forty. I was forced to redefine my purpose and attempt to rebuild as well as redevelop a business purpose. I ended up not being able to build my purpose with a construction company or re-establish a foundation on service with community works.

The journey continued as I transitioned to a company which was treading water jumping from tactic to tactic. I observed you cannot create a purpose from multiple tactics. Over the last six years I have observed several drivers of successful people and businesses. These individuals tend to excel on focusing on their purpose as well as executing with diligence on the simplest of tasks.

What made these individuals and organizations successful? After selling my firm which included my purpose at the time; it was difficult to separate the two. At the time, the two seemed intertwined with one another. They were the same for so long. How could I once again begin adding value once again?

After reflecting, I decided my journey should be to continue the path of Vision Casting. Although I did not call it Vision Casting years ago, it was the same process I once completed for my organization in the past. Vision Casting was a reason I was successful. I always shared this success freely with other individuals, businesses and charitable organizations.

Vision Casting begins with determining the individual or organization's purpose. The purpose of the individual or organization is the reason they exist. What are they here to fulfill or complete? The purpose can be answered with a Vision Statement.

The Vision Statement

A Vision Statement is one sentence which describes what you would like to accomplish out of your life or business venture. The Vision Statement is generally no more than eight to ten words. However, it can also be short perhaps just a few words. A Vision Statement should come naturally and be able to say with ease.

I will share a rule I first created for a charitable organization and I implemented for all organizations I am a part of. The rule is that we would state the Vision Statement out loud at the beginning of every meeting. This would allow the individuals attending the meeting coming from different directions of life during the day to hear the reason they were all gathered.

These individuals were all intelligent, creative, solution-oriented and had a lot to offer. However, I required them to focus on the reason we were all gathered and what we were attempting to accomplish. Stating the Vision Statement allows everyone's energy to be directed on the reason we

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were all in attendance. The results of stating the Vision Statement at the beginning of all meetings (business and charitable) include, but are not limited to, an increase of focus and relevant strategic ideas. The comments and solutions became more focused than ever on the organizations goals.

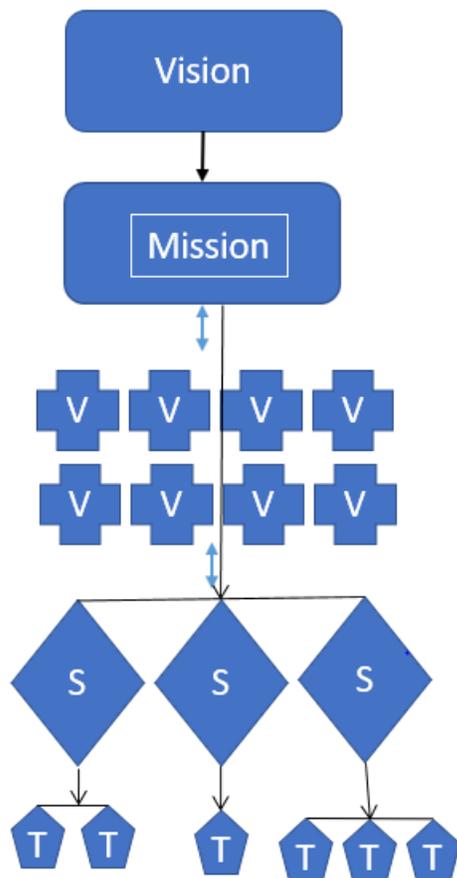
The Mission Statement

Once the Vision Statement is crafted the Mission Statement can be established. The Mission Statement navigates how exactly you will arrive at the destination. The Mission Statement can be several sentences, perhaps a few paragraphs. The intent is not to be an epic novel. It can define the location, geography, demographics, customers, and other important type of culture and delivery information. A good Mission Statement is clear, concise, and useful. A great Mission Statement is encouraging and inspiring.

Values

The Vision Statement and Mission Statement will guide the individual and organization to form Values. Values are the moral code, the organizations North Star. Values are the individual's or organization's fundamental beliefs that will guide or motivate attitude or actions. Once the Values are established you

or the organization can define how you intend to deliver and service your products and services when fulfilling your Purpose, Vision Statement and Mission Statement.



Strategy & Tactics

Once the Purpose, Vision Statement, Mission Statement and Values are established the individual or organization can move forward to establish Strategies. Strategies are your plans to achieve a certain goal. There can be multiple Strategies to complete the Mission Statement. Strategies form Tactics.

Tactics are specific actions you are going to take in order to complete a part or all of one of your strategies. There can be multiple Tactics for each Strategy.

The Purpose, Vision Statement, Mission Statement and Values are generally stable over the long-period of time. You and your team will want to review and update them every few years.

Strategies and Tactics are required to be formed and updated more often. Strategies and Tactics are established and can be completed as required. Some

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Strategies may be hourly, daily, weekly, monthly, annual, multi-year. Tactics may be a one and done project or require multiple actions.

A Tactical Lesson

Books, such as the E-myth by Michael E. Gerber, elude to small business owners are usually good at a single trait: e.g. a sales skill or a knowledgebase. The rest of the necessary business skills the entrepreneur is forced to learn along the way. Entrepreneurship is challenging, complex. Growth is required on multiple fronts. When there is a success the entrepreneur repeats the success.

The entrepreneur repeats the behavior due to understanding there is generally a reward. Humans have learned this over time. Pavlov's famous experiment regarding classic conditioning procedure may prove this as well.

Anchoring and Adjusting

The entrepreneur is anchored on the behavior, on the busyness, on the quick fix and on many other reasons. Their time is important! They are stressed and their business is growing. What is the problem? The problem is solved until the next problem appears. Don't worry, there is a new next quick fix. The entrepreneur fixes it again. The entrepreneur loves this arrangement as they are the hero. It fulfills their ego. The sales consultants love this arrangement as they have repeat business from the entrepreneur. It acts as an annuity.

The problem: the entrepreneur is solving tactics. The entrepreneur is jumping from tactic to tactic. If you ask the entrepreneur simple questions, they can no longer answer. Where are you going? How are you going to go there? What do you stand for?

I have served with an entrepreneur who mentioned that a Vision Statement was 'marketing scam' and "documenting failure." This entrepreneur stated there was no reason to have a Vision Statement, Mission Statement or Values. This venture has not gone anywhere in over four years and has no moral compass. Would you like to work, do business or be a supplier with this organization?

Entrepreneurs and small business owners tend to anchor their processes. Processes are necessary to make businesses efficient. Everyone becomes accustomed to the process. Becoming familiar with a process leads to comfort. Perhaps the process works, or the entrepreneur developed the process, or internal company politics, or the entrepreneur may not want to pay for a new solution. No matter what the reason, the process is not changing.

"No one likes or enjoys change; stay comfortable!" becomes a de facto motto. However, the world slowly changes around the small business. Yet, no one notices. The owner makes no changes or investments into the business for various reasons. The business wakes up and the Balance Sheet is weak, the equipment has aged and the industry is in trouble. How did this happen?

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The world changed when management was anchored to processes. Instead of being anchored, the team should have been adjusting the process and updating it from time to time. A simple solution would have been to update Strategies and Tactics. Updating Strategies and Tactics would allow the team members to review and challenge processes from time-to-time and identify new ways to improve the process. Jumping from Tactic to Tactic will fuel this problem.

Availability and Representative

Individuals tend to use availability processes when estimating. Availability process of thinking tends to overestimate or underestimate the likelihood of an event. Availability uses the best examples available from our mind. Generally, a very biased source of information.

For a better outcome, individuals should use a representative process. A representative process is a more exact measurement. Instead of applying a personal biased guess you acquire a specific instance to compare.

Herding & Confirming

People also use herding and confirming techniques. Herding in a negative way would be bullying. Confirming in a negative way would be using information we are comfortable with instead of true information. For example, if we like animals we might go to a PETA or People for Ethical Treatment of Animals website for information instead of a neutral website.

Herding and confirming can be deployed positively as well. Herding can be used in a survey of neutral participants. Confirming can be used to find neutral information to justify a case or position.

How many other small businesses are similar? When I had my CPA firm I met several individuals similar to this entrepreneur. Fancy material items to attract the world, but no life compass. Vision Casting allows you to build out the organization to have its life compass. I used Vision Casting to successfully build and sell a CPA firm. When the 'accountant' inside me passed away I was able to use Vision Casting to give rebirth to the 'entrepreneur' and 'man' inside of me.

Mark Wyssbrod, CPA has transitioned to Industry after serving 15 years in Public Accounting. Mr. Wyssbrod is a small business owner and entrepreneur. He has observed the power of purpose in various organizations. As a manager Mr. Wyssbrod observed how people transitioned during major turning points including transitioning from traditional accounting systems to an ERP."