

# The Daring Futures Playbook

## #1 - Vision Canvas

---

### What's the big idea?

The vision canvas is a structured conversation, where a team is facilitated in sharing their views with each other, by placing them onto the canvas. The experience is facilitated, with the facilitator timeboxing the amount of time spent in each section of the canvas. Each box is designed to build on the insights of its predecessor, and thereby linking a plan of actions back to the realisation of a vision.

Applications include:

- a. Project kick-off / 'lift-off' events
- b. Project reset / recovery events

**Daring Tip:** The magic of the canvas is in creating a sense of urgency in getting from the 'Vision' box to the 'Plan' box. Don't let the team dwell on any section. Keep the team on track and on time!

### So what?

#### Alignment (or overcoming fragmentation)

In "[How Google Works](#)", the authors speak about a new breed of multifaceted employee they term 'smart creatives'. Rallying smart creatives around a project and towards a shared outcome can be as tricky as [herding cats](#). In fact, this can be a similar experience in any established organisation when some form of change is introduced. The effect is called fragmentation and is illustrated by [this Prime](#).

The vision canvas creates alignment (reestablishing cohesion) by allowing stakeholders and team members the opportunity to air their differences in a structured dialogue, and by careful facilitation, reach compromises.

## Context, scope, and evaluation

Another challenge that can face teams implementing change is that there is no clear solution, and they lack any framework to evaluate solution options. This is illustrated by the five core agreements in the [core Prime](#).

The vision canvas overcomes these challenges in a two-fold way:

- a. Firstly, the canvas has a top-down approach, which surfaces key insights and relationships **before** any solutions are discussed
- b. Secondly, this approach creates a solution-agnostic hierarchy of values, against which solutions or actions can be tested. For example:
  - a. *Does this action move us towards, or away from the vision?*
  - b. *Is solution (a) more aligned with our values than solution (b)?*

## Process

For each box in the canvas:

1. **Framing** - *Announce the box, and set the framing question(s)*
2. **Creating** - *Then have participants write answers onto Post-it notes, with one answer per Post-it note (5 minutes)*
3. **Sharing** - *After which have them bring them up to the canvas and present their suggestions (1 minute per participant)*
4. **Sense-making** - *Finally, allow group discussion to acknowledge what has been shared, and potentially synthesise individual contributions into common themes (or [affinity diagrams](#))*

**Daring Tip:** Don't be afraid to park some topics if they become heated! You can always revisit them later when things have cooled in the room. Keep reminding the group about the answers they have given for the previous boxes on the panel. Ask, "How does this align with what we've already discussed, here?"

**Daring Tip:** If the group needs to revisit previous boxes in light of new information, this is OK too. Remember, it's **their** experience, and it's important that **they** are aligned.

## The boxes

### 1. Vision

- a. *"We see a future where..."*

**Daring Tip:** This is often the hardest box to complete, since competent adults will usually want to five straight to solution. Instead, keep the group focussed on what the future will look, sound and feel like. This will begin the formation of ***the North Star*** that will guide the rest of the work, as you'll see.

**Daring Tip:** Sometimes this box has to be revisited, later in the session, later in the day, or even later in the course of the project. A shared vision is the synthesis of everyone's perspective. A shared vision is something that becomes alive in the hearts of everyone in the group. Trust me when I say, ***you'll know*** when you've got this.

### 2. Values

- a. *"This is important because we believe that..."*

**Daring Tip:** These are a collection of the [virtues](#) that guide us to take into account the human element when we interact with other human beings. The list should include what people believe is important to them, but also the organisational values. For example, DfE list the following values: ***Integrity, Responsiveness, Impartiality, Accountability, Respect, Leadership***, and ***a commitment to Human Rights***.

### 3. Mission

- a. *"So we will..."*

**Daring Tip:** Having set the scene with the Vision and Values, we're ready now to set a high level intention, as to how we're going to bring those together. Often referred to as "[commander's intent](#)", this is the definition and description of what a successful operation will yield. In MTC, our mission is: ***"To give every child a fair and comparable experience"***.

### 4. Success Measurements

- a. *"How do we quantify success?"*
- b. *"How will we measure the outcome? (Lag measure)"*

**Daring Tip:** Having established the mission, what (specifically) are the measures of the mission's success? These need to real ***outcome*** measures, either qualitative or quantitative, that can be presented as KPIs (date and unit). See "[How to Measure Anything](#)" for help if needed here.

**Daring Tip:** Note that we've already set up the **North Star** measures, since we can review the mission suggestions and ask, *"To what degree does this realise the vision, and honour our values?"*

## 5. Progress Measurements

- a. *"How do we quantify progress?"*
- b. *"How will we measure progress towards our vision? (Lead measures - predictive, and influenceable)"*

**Daring Tip:** These can be trickier to define than the success (outcome) measurements, since they will often feel like a bet (or hypothesis). I.e. *If I do x I will get y*. For example, the success measure for a diet is weight loss, whilst the progress measurements are calories eaten, calories expended, and number of hours of sleep.

## 6. Process Impact

- a. *"What processes need to change in order to realise our vision?"*
- b. *"What is the 'blast radius'?"*
- c. *"What is directly and indirectly affected?"*
- d. *"What will be the consequences of the change?"*

**Daring Tip:** Here we're digging deeper into the **'what'** of the change, that will be instigated by the mission. We're looking for insights into the boundary of the change (setting the scope), as well as the change work items themselves. In Agile terms, we may refer to these as **Epics** at this point.

## 7. People Impact

- a. *"What people, roles and structures need to change in order to realise our vision?"*
- b. *"What is the 'blast radius'?"*
- c. *"Who is directly and indirectly affected?"*
- d. *"What will be the consequences of the change?"*

**Daring Tip:** Now we'll dig deeper into the **'who'** of the change. Once again we're looking for insights into the boundary of the change (setting the scope), as well as the change work items themselves. In this instance, we're looking to establish a [stakeholder map](#) with communication plan, potentially conduct [training needs analysis](#), as well as enrol stakeholders into our [user \(customer\) experience research](#) studies.

## 8. Uncertainties

- a. *"What are we assuming? What don't we know? What do we think we know, that might not be so?"*

**Daring Tip:** Having taken the group this far, this is where we're looking for gaps in our understanding, or assumptions that we're making. In Agile terms, these items are the work of **Discovery** studies, and early candidates for **Alpha** prototypes.

**Daring Tip:** We group these items into 3 groups, which align to the 3 major project (change) risks: **valuable** (users), **feasible** (technology) and **viable** (service). These 3 groups form the basis for the 3 work-streams (studies) that will run throughout the Discovery, Alpha, Beta and Live phases of the project: **user experience study**, **technical delivery**, and **business transformation**.

## 9. Plan

- a. *"What are our hypotheses?"*
- b. *"What experiments do we need to introduce?"*
- c. *"What actions will we take to support people through the change?"*
- d. *"What does the support and communications plan look like? How will we collect feedback during the change?"*

**Daring Tip:** This is where we structure the suggestions into a story map - see [Jeff Patton's resources](#) for more information on this technique. This box will be the genesis of the story map that can be further elaborated in a subsequent workshop. But for now, we've taken the group through a whole process from vision to a plan of action, and they deserve a celebration. Great work!

## Materials & Resources

**Daring Tip:** When choosing supplementary materials and resources for your lesson plan (books, videos, etc.), try to put yourself in the shoes of your students. Find resources that ENHANCE your lesson and make your instruction an inviting learning experience for your class!

- a. Roles:
  - a. Sponsor - essential
  - b. Facilitator - essential
  - c. Scribe - useful, if the process is being conducted online
- b. Prerequisites:
  - a. Strong facilitation skills - time-keeping, mediation, leadership, and the creation of psychological safety
- c. Materials:
  - a. [This guide](#)

- b. [The Vision Canvas \(A3\)](#) - can be printed onto a poster for group working
- c. [The Vision Canvas \(Google Slides\)](#) - for online (remote) working
- d. Other resources:
  - a. [Core Prime](#)
  - b. [Fragmentation](#)
  - c. [Affinity diagrams](#)
  - d. [Virtues](#)
  - e. [Commander's intent](#)
  - f. ["How to Measure Anything"](#)
  - g. [Stakeholder map](#)
  - h. [Training needs analysis](#)
  - i. [User \(customer\) experience research](#)
  - j. [Story Mapping](#)

## Assessment

Not applicable.

## Licensing



Daring Futures Playbook and Content by Daring Futures Ltd is licensed under a [Creative Commons Attribution-NonCommercial 4.0 International License](#).

Based on a work at [www.daringfutures.com](http://www.daringfutures.com).

Permissions beyond the scope of this license may be available at <https://www.daringfutures.com/creative-commons-license/>.