1

Featured Chapter

Creating a Strategic Direction

Visions and Values

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ncreased globalization and the incorporation of many new information technology (IT) tools have enhanced the need for top management to set a clear strategic vision for a company. As market demands and the ability to communicate globally encourage companies to continue to expand into new geographical and product markets—and as they also enter into long-term buyer-supplier relationships or contract out activities previously conducted internally—companies are spread more thinly. This creates a challenge of how to coordinate all of the activities conducted around the globe and by partner organizations. While sophisticated software programs (e.g., enterprise resource planning [ERP]) or intranet capabilities enhance internal communication, these are not adequate. Establishing and maintaining a consistent strategic direction for the company begins with setting a clear vision for the company.

A strategic vision provides multiple benefits to a company. First, it presents a broadly shared sense of organizational direction and purpose. Direction is needed because few organizations have achieved greatness by being all things to all consumers. To instill a purpose, most successful companies achieved their leadership position by adopting a vision far greater than their resource base and competencies would allow (de Kluyver & Pearce, 2002; Hamel & Prahalad, 1989). A vision also provides a framework for the organization's missions and goals. Without a vision, the organization may pursue a set of isolated goals with which some employees may not be able to identify. For example, goals such as attaining a 10% increase in sales or an annual increase in customer satisfaction scores may not be goals that a research and development (R & D) or a purchasing manager may find compelling. Similarly, without a vision, a goal may be interpreted differently by different stakeholders. Improving customer satisfaction may mean one thing to a manufacturing engineer (e.g., a better product) but something different to a customer representative (e.g., better service) or a financial manager (e.g., offering better terms on accounts receivable). A strong vision will connect these goals to the company's underlying values and will make it more understandable about how to achieve each particular goal. Such a

vision is essential for developing a strategy-focused organization and alignment within the company (e.g., Kaplan & Norton, 2000, 2006). Finally, a strong vision leads to enhanced communication, participation, and commitment by employees. As William O'Brien, CEO of Hanover Insurance noted, "[P]eople must share certain values and pictures about where we are trying to go. We discovered that people have a real need to feel that they're part of an ennobling mission" (Dess & Picken, 2000, p. 19).

While the benefits of a good vision are quite apparent and every business has some form of a vision—either implicit or explicit—not all vision statements achieve these benefits. According to Kotter (1996), an effectively worded vision statement should be, amongst other characteristics, graphic, directional, feasible, and easy to communicate. Those that do not will likely be considered bland, vague, overly broad, or generic. Collins and Porras (1991) noted,

Most vision statements are terribly ineffective at creating a compelling guiding force ... They don't grab people in the gut and motivate them to put forth their best efforts toward a compelling goal. They don't mean something to people all up and down the organization. . . . they usually are nothing more than a boring stream of words. They are not compelling, nor are they exciting. They're not clear, crisp and gut-grabbing. (p. 31)

The challenge of creating a compelling vision begins with top management. John Seely Brown, former chief scientist for the Xerox Corporation, argued, "The job of leadership today is not just to make money: It's to make meaning" (Dess & Picken, 2000, p. 19). A clear and compelling vision, relentlessly communicated by a company's senior team, is crucial for building organizations that can respond to rapid changes in technology and markets (O'Reilly & Tushman, 2004).

The purpose of this chapter is to help hospitality industry professionals understand the importance of creating a strong vision for a company. We do so by first describing what we mean by strategic vision and then describing how it relates to a company's values and mission. Next, we focus on ways top management can develop a vision and finally conclude by addressing how top management can spread this vision throughout the organization to create strategic direction.

The Strategic Vision Concept

Many managers report being overwhelmed by the concept of a strategic vision. While they know a company should have one, they are often confused by how to develop one and what constitutes a good strategic vision. Part of the concern stems from the multifaceted and sometimes daunting expectations for a vision. For example, according to Mintzberg, Ahlstrand, and Lampel (1998), a good vision is both inspiration and a sense of what needs to be done. It is something that is thought about and becomes a deliberate plan of action but also has to be flexible to allow for emergent actions as the actions evolve. Besides trying to meet these lofty and somewhat dichotomous goals, confusion about strategic vision exists because actual vision statements vary considerably and may be as general as a dream of the future or as detailed as a specific goal.

The confusion exists, in part, because in practice the concept of a strategic vision is multifaceted. Mintzberg et al. (1998) identified three primary tensions, or six types of "seeing" listed in Exhibit 1.1—that capture ways managers have related setting a strategic direction as different forms of seeing. The first tension is between "seeing ahead" versus "seeing behind." While often management may be tempted to envision an uplifting future for the company, the company has to consider its current and past situation and whether it has the resources and capabilities to achieve the future vision. For example, a company that has routinely pursued a low cost strategy in hotel management will not easily be able to pursue a vision of becoming a full service provider for high-end hotel customers. The Motel 6 commercials featuring Tom Bodett are an excellent example of managing customer—and employee—expectations. The commercials indicate what you won't get (i.e., a fancy lounge, a gourmet dining room, or a grand lobby) and what you can expect (i.e., a clean room at a reasonable price provided by a friendly staff) followed by the tagline, "We'll leave the light on for you!" An attempt by Motel 6 to get into the luxury segment of the hotel market would probably be met with failure since the company does not have the core competencies to market or operate that type of property. Furthermore, the existing customers would not have a clear understanding of the product.

Exhibit 1.1 Three Tensions in Defining a Strategic Vision

- · Seeing Ahead Versus Seeing Behind
- Seeing Above Versus Seeing Below
- Seeing Beside Versus Seeing Beyond

The second tension is between "seeing above" versus "seeing below." Seeing above involves connecting the day-to-day activities to the big picture, while seeing below involves the need to know all the facets of a business. In finding a "diamond in the rough" strategy, management will have to submerge itself into the details of the company and become intimate with all of the company's operations. Ray Kroc, a food service equipment salesman selling the Multimixer milk shake machine across the country, became intrigued when he saw the business volume that was being generated by Mac and Dick McDonald at their burger restaurant in California (for a detailed description, see Kroc, 1977). Kroc quickly partnered with the brothers and started his own McDonald's in 1955 in Illinois. In 1961, Kroc bought out the brothers for full rights to the McDonald name. As he franchised the concept to others, Kroc became a stickler for details and wrote extensive training manuals for his franchisees. He even developed Hamburger University to provide franchisees and employees with exacting standards about how things were to be done. Similarly, Jim McLamore and his partner, Dave Edgerton, saw an opportunity to capitalize on the hamburger boom that McDonald's was experiencing by making a better product and streamlining production. Rather than grilling their burgers, they used a continuous belt "flame-broiler" that broiled the hamburgers on both sides to produce a tastier and juicier product. They later shortened the name of their Florida company from Insta Burger King to Burger King (McLamore, 1998).

Finally, Mintzberg et al. (1998) observed that some vision discussions note the importance of "seeing beside" versus "seeing beyond." Seeing beside involves managers thinking creatively or differently about a problem, such as envisioning online booking for hotels in the early stages of the Internet. Seeing beyond is considering an unexpected future or where there is a discontinuity in the marketplace. This might involve a company anticipating that a current product or service will no longer exist but will be replaced by an unrelated one. For example, when Apple introduced a legal Internet music downloading service, this changed the unit of sales from a complete CD to a single song.

Howard Johnson was "seeing beside" when he provided the first premium ice cream to customers by using his mother's recipe (with twice the normal amount of butterfat) and developing a "gourmet" hot dog by cutting the ends off, slicing the hot dog down the center and then grilling the hot dog in real butter and serving it on a grilled, buttered roll. Realizing that he was unable to open enough restaurants to meet demand—and realizing the opportunity to provide roadside restaurants for the growing traveling public—Johnson developed the franchise system to grow his business. It was Johnson's franchise system that Ray Kroc used so successfully years later to grow the McDonald's chain. Unfortunately, Johnson didn't see beyond as well. The gas crisis in the early 1970s and the growth of the quick service restaurant (QSR) market led by McDonald's resulted in customers abandoning Howard Johnson's restaurants. Within a short period of time, Howard Johnson's went from being the world's largest restaurant chain to a company with fewer than a dozen units (McLamore, 1998).

J. Willard "Bill" Marriott provides an example of seeing beyond when he traveled through Washington, D.C., in the summer and realized that there was a need for relief from the heat and humidity. He obtained an A&W Root Beer franchise and returned to Washington to open a nine-stool root beer stand. He quickly realized that the business was too seasonal to be an economically profitable venture, so he added food to provide for year-round clientele (O'Brien, 1977). In an example of developing "strategic intent" (Hamel & Prahalad, 1989), the company set out to meet an ambition that was beyond its current resources and capabilities. The business grew into Hot Shoppes and eventually included in-flight airline catering and hotels.

Mintzberg et al. (1998) also noted that there is a seventh type of seeing: "seeing through." This is top management's responsibility for taking the six different types of seeing and seeing the entire vision through to completion.

An example of top management engaging in these various forms of vision is when Michael Eisner became CEO of Disney (Eisner, 1998). The company had struggled for several years before he joined in 1984 with the directive to revive the company. In setting the company on a new course, he and his management team balanced many of these vision tensions. In displaying seeing ahead and seeing behind, they recognized the value of the history of the company and its film library and sought to develop not only new movie and television material but new outlets for the existing material, such as home videos and cable and eventually the Internet. Seeing below was important as the company continued to pay attention to details, such as how the cleanliness and efficiency of its theme parks helped to build the quality of the customer's overall Disney experience, and seeing above focused on the company's recognition of linking together the theme parks, the movies, the cable networks, and the merchandising. Seeing beside

and seeing beyond became a continual effort in an industry that requires balancing creativity and fiscal control. For example, the company routinely held "gong shows," where in creative meetings, managers were encouraged to suggest their most unlikely or outrageous ideas, knowing that most would be "gonged" as not good. These sessions helped to encourage workers to use more imagination and not just suggest safe or familiar ideas, leading the company to initiate new efforts such as Disney-themed retail stores and to create Broadway shows based on their characters (e.g., *The Lion King*). Finally, all of these visions were unified by seeing through to Disney's brand name, each of these efforts working to enhance Disney's image as an international entertainment conglomerate. Although Eisner left Disney in 2005, the vision set forth produced considerable growth and financial success for the company.

We recognize the various dimensions of the concept and offer our definition of strategic vision as the shared understanding of a realistic, credible, attractive future for the company and how it must change. In addition, a good vision will consider the past and the future, will attend to the big picture but also understand the details of the company, will reflect creative as well as discontinuous possibilities, and will be something that top management can implement. Having identified the multiple facets of a company's vision, we now turn to how a vision is related to a company's values and mission.

Connecting a Vision to Values and Mission_

It is important when establishing a vision to connect with the company's values and its mission. Collins and Porras (1991) argued that an organizational vision consists of two major components: a guiding philosophy and a tangible image. The guiding philosophy comes from the core beliefs and values of the company. Often these beliefs and values are established by the founders of the company. For example, W. L. Gore & Associates, the maker of GORE-TEX and other products based upon the polymer polytetrafluoroethylene (PTFE), established from the onset its values of informality, innovation, and empowerment. Bill Gore, the founder, established a "flat lattice organization" with no chain of commands or predetermined channels of communication. Rather, the work takes place through teams, and employees are guided by key underlying principles. W. L. Gore & Associates continues to focus on innovation and in 2009 was named by the magazine Fast Company to its list of the world's 50 most innovative companies. This emphasis on innovation is revealed in its vision to be "a provider of unique, innovative, best-in-class, high value, high quality products that consistently do what we say they do" (Funding Universe, 2010). Similarly, AES Corporation, a global energy company, established early on its values of integrity, fairness, social responsibility, and fun (AES Corporation, 2009).

Conrad N. Hilton instituted the concept of treating his customers as "guests" and asking employees to treat customers as if they were guests in their home. Thus, after World War II when there were not enough hotel rooms to meet demand, Hilton encouraged his employees to help people find alternative accommodations if they wanted a room at a Hilton hotel and there were not any rooms available. Hilton felt that such service would cause the individual to go to a Hilton hotel first when they needed a room in the future. Hilton also felt it was important to meets the guest's needs, even if his or her room were not yet available. Thus, he

provided messages and a changing area with a shower for guests who arrived before their room was available.

Bill Marriott preached that if he "takes care of his employees, they'll take care of the customers" (O'Brien, 1977, p. 8). Among other things, he paid the top wages in the industry and practiced what he preached. The culture permeated his entire organization (O'Brien, 1977).

Such core beliefs and values lead into a purpose statement. According to Collins and Porras (1991), this is a one- or two-sentence meaningful and inspirational statement that captures the soul of the company. While a company's purpose may not be unique and may take effort to develop, it will be a motivating factor in attracting some individuals to the company and repelling others who would not fit.

The guiding philosophy leads to a tangible image. While the values and beliefs as well as the purpose that make up the guiding philosophy may not always be articulated, the components of the tangible image—the mission and a vivid description—are more apparent. The mission statement consists of a clear and compelling goal that seeks to unify the business. It should have an expected finishing point but also serve to stretch the members of the business and to be challenged. An ideal mission statement should contain "big, hairy, audacious goals," or BHAGs. This statement is then translated into a vivid description. This may be a colorful phrase, a powerful image, or a metaphorical story that conveys the company's passion, emotion, and conviction for its vision to stakeholders.

Developing a Vision

Developing a vision, as we noted, is a primary responsibility of top management. Robert L. Johnson, the founder of Black Entertainment Television (BET), argued that the role of a corporate leader is to have a vision, articulate that vision, and then give the people the resources and direction to fulfill that vision (Lapchick, 2004). In his situation, Johnson espoused the vision of having BET become the preeminent African American entertainment company in the world. Because this was clearly understood, employees bought into it and the company was able to grow successfully. Important in this process is that top managers do not have to feel that only charismatic leaders can develop such a vision (Collins & Porras, 1991). Since a vision is a shared understanding of a desirable future, it is not only top managements' responsibility. While top management starts the process, it is typically an iterative one involving many levels in the organization.

For those managers who may find it more difficult to develop a vision, fortunately there are a few techniques that can facilitate the development of a strategic vision. Three such efforts are the core capabilities matrix (Schoemaker, 1992), cognitive mapping (Cossette, 2001), and strategy canvas (Kim & Mauborgne, 2002). While there are notable differences among the approaches, they have in common that each begins with top management reflecting upon or, through discussions with one another, analyzing the demands of the competitive environment. In some approaches, this may involve trying to create scenarios of the future of the industry while others commence with creating a detailed listing of industry key success factors. This is followed by a detailed description of the company's core competencies and may include a comparison with primary competitors' competencies. Typically these are

presented in a visual format: a matrix of the capabilities needed for different business segments under different scenarios, a drawing that compares a company to competitors on key success factors for an industry, or a cognitive map drawn by a trained consultant. Through discussions, reflections, and even software programming, these representations are analyzed with a goal of clarifying what competencies the company has that are important across different business segments, that are unique to the company, and how various competencies might be related to one another. The final result from any of these three approaches should be a clearer indication of the company's current situation and a vision of where it should go and the changes that need to be made to attain this vision.

Ray Kroc realized that the key success factors for the QSR industry were quality, service, cleanliness, and value. He not only reinforced these ideas at all levels of McDonald's but he also used the words in advertising to promote the restaurants. Jim McLamore, cofounder of Burger King, suspected that he could gain a competitive advantage over the absolutely uniform standards Ray Kroc was setting at McDonald's by offering his customers the option of customizing their purchase. Like Kroc, McLamore used advertising to inform his customers and developed the "Have it your way!" advertising campaign.

Consistency and uniformity are not only core competencies needed in the restaurant industry but are also core competencies needed in the hotel industry. Howard Johnson started a chain of Howard Johnson Motor Lodges to provide the traveling public with a consistent lodging product, and Kemmons Wilson quickly followed suit by developing the Holiday Inn concept. Ramada soon followed, and all three chains flourished. Bill Marriott took the concept a step further when he realized there was a need for consistent quality and service levels in full-service hotels, and he started the Marriott hotel chain (O'Brien, 1977).

Creating a Shared Vision

Once top management commences the process of developing a strategic vision, it is essential that the company as a whole embraces and pursues the vision. The goal is not just to create a strategic vision but to create strategic thinking by the entire organization and to move from a vision of the leader to a visionary organization (Collins & Porras, 1995). Creating a shared vision has been defined as one of the key disciplines managers should work on in developing a learning organization (Senge, 1990).

Domm (2001) addressed the problem that top managers too often overlook this step and assume employees not only share the same vision for the company but also know how the vision is linked to operational actions. Drawing from interviews with managers in a variety of companies, he argued that managers need to understand the linkage from vision to goals to operational performance and to rewards. He also argued that they need to engage employees in discussing progress and their needs in working toward the vision. Specifically, he recommends the following seven actions:

- Articulate the organization's vision clearly and continuously.
- Make certain the employees accept and believe the vision.
- Place the vision and associated strategy into a larger industry and business context.

- Set achievable goals that keep the organization focused on the target.
- Tie each subgroup and employee to the vision by relating operations to the vision.
- Make certain that employees are rewarded for activities that move the firm toward realizing the vision.
- Make the vision a passion. Be passionate about the vision.

Probably the person who best exemplifies all seven of these attributes is Herb Kelleher, cofounder of Southwest Airlines. Kelleher envisioned his competition as the automobile and his potential customer as nonfrequent flyers. Thus, he developed an airline that was not only inexpensive but fun to fly. Kelleher was certainly passionate about his vision and made certain that the vision permeated the entire organization. The fact that Southwest reinvented the airline industry and that it is the only major carrier that rarely has losing quarters certainly proves that his methods and vision work.

Howard Johnson, Ray Kroc, and Jim McLamore used franchise agreements and detailed standard operating procedures (SOPs) to convey to a variety of stakeholders exactly what they wanted to accomplish and how they wanted to do so. Dave Thomas, founder of Wendy's, used television advertising extremely effectively to accomplish the same thing.

In addition to getting employees to buy into the vision, it is also important that external constituents support the vision. Hatch and Schultz (2001), in their discussion of corporate branding, explore how to manage a gap that may exist between a company's vision and its stakeholders' image of the company. Such a gap exists when managers do not listen to key customers, suppliers, or partners. Top management should ask questions that help examine any potential gap between management and stakeholders: Who are our stakeholders? What do our stakeholders want from our company? Are we effectively communicating our vision to our stakeholders? Addressing these actions and questions will determine if the vision will likely spread to all employees and to external stakeholders and, if not, this will likely suggest changes needed to ensure broader support for the strategic vision.

Hatch and Schultz (2001) also provide an example of how Lego, the toy manufacturer, managed to narrow such a gap when it set out to reinvent the company. The process began when top management asked external experts to assess the company's overall image. They found out that the company had a strong image and encouraged Lego to see itself not as a company that makes toys but rather as a leader in the business of creativity and learning. This resulted in the company rethinking its vision. Brainstorming sessions, with top management as well as external experts and customers, led to a search for a vision that would be inspirational to the employees and the stakeholders. They developed the revised vision of becoming the strongest brand among families with children by 2005. A series of company-wide seminars were launched to help spread the new vision. At the various seminars, employees shared their dreams for the company and for themselves. They also held sessions where employees participated in real-time problem solving. These efforts reduced the gap between the new vision and the culture by connecting the company's new vision to employees' personal goals and by employees accepting some of the responsibility for addressing the problems they faced in implementing this vision.

The Howard Johnson company was eventually sold and then split into two companies—the restaurant company and the motor lodge division. Hospitality Franchise Systems (then

known as HFS and now known as Cendant) ended up with the ownership of Howard Johnson's Motor Lodges. They did an extensive amount of research to assess the company and its brand image as the initial step of reinventing the company.

Commentary by Mr. James Chen of Janfusun Fancyworld

Mr. James Chen is a board member of Janfusun Fancyworld. The park was established in 1990 by the Nice Corporation and is now Taiwan's leading theme park with approximately 2 million visitors a year. Janfusun Fancyworld takes up more than 60 hectares in central Taiwan and contains several theme park areas, including amusement rides, a water park, a children's indoor playground, and numerous shops and restaurants. On the grounds are also the Janfusun Prince Hotel and the Janfusun Outer District. The Janfusun Prince Hotel is a world-class resort hotel with conference and banquet facilities, restaurants, and a spa health club while the Janfusun Outer District provides nightlife activities for the family (i.e., dancing and singing performances, fireworks, light and water shows). Mr. Chen spoke with Professor Tsungting Chung about the company's mission and vision statement.

Our company's vision statement is "To be a number one, forever pursuing, and leading management team and to be an entertaining dream-making fulfilling service team." And our mission statement is "Providing an endless surprise to every visitor." Our vision and our mission statement developed from our underlying management philosophy, which focused on innovation and education as fun and on creating a healthy environment.

When we decided to create the company, we developed our vision and mission statement in a process very similar to what is described in this [chapter]. We spent time discussing our underlying philosophy and used that to create our vision for the company and then our mission. It took time to develop them, but once we wrote each down we have used them to guide our company's development. They guide both big decisions and smaller, day-to-day decisions. For example, the larger decisions of adding the Janfusun Prince Hotel and the Janfusun Outer District helped us appeal to additional customers. However, it also guided our decision on less expansive efforts, like adding multiple escalators so customers do not have to walk as much to reach some of the rides. Now customers who want to run can use the stairs while those who prefer to save their energy can take the escalators. These new services help us to deliver on our mission of providing more surprises to our guests as we seek to create fun for all, both young and old.

We make sure that everyone in our company knows our mission statement and vision statement. New employees hear the vision and mission statements in orientation videos, and these statements continue to guide us in our decision making about the direction of the Janfusun Fancyworld. We currently have not plans to change either, but if we did, a new statement would look very similar to our current ones. (T. Chung, personal communication, December 7, 2008)

Conclusion

This chapter focused on the importance of developing a strong company vision, the challenges of developing such a vision, and then spreading the vision throughout the company. Developing a vision is not something that can be done quickly or lightly. It requires considerable analysis and reflection by top management as well as communication with—and feedback from—employees and external stakeholders. It also requires balancing between a number of different pitfalls such as between developing too pedestrian of a vision that is not inspiring and one that is too grandiose or unattainable or between a vision that is the personal passion of top management but is not shared by others. Further, managers must recognize that while a vision should guide a company's actions there has to be some flexibility in the vision to incorporate changes in the competitive landscape or in a company's competencies that may alter the value of the original vision. In summary, developing a clear strategic vision is one of the most important jobs of top management, but it is necessary but not sufficient for developing an organization that can compete in a rapidly changing environment. It is the first step but must be followed by the remaining elements of strategy.

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