

STEP 3:
Envision the Future

INTRODUCTION

Your vision script is a three-part document. It includes:

- Your **Mission and Values** will describe *who you are*.
- Your **Current Reality** will describe *where you are*.
- Your **Future Reality** will describe *where you're going*.

To build your vision script, you'll walk through four stages.

STAGE 1: FINALIZE MISSION AND VALUES | PAGE 97-98

Even though you've done an initial revision earlier in the Strategic Design process, now it's time for a final look. After this stage is complete, you will consider your mission and values final for the next twelve months.

STAGE 2: FINALIZE CURRENT REALITY | PAGE 99-100

At the beginning of the Strategic Design process, you delegated the compilation of your current reality to the people with the greatest insight into your products, programs, services, and stakeholders, and tasked a central individual to





compile these updates into a single document.

Now, you'll revisit the information they've provided, making updates as necessary.

STAGE 3: ENVISION FUTURE REALITY | PAGE 101–102

Finally, it's time to stand in the future and describe what you see. Your future reality will share the same structure as your current reality. It will meet four criteria:

CRITERION 1

It describes a 3-year horizon. It's written as though you're describing your present 3 years from now.

CRITERION 2

It involves substantial increase. It feels risky.

CRITERION 3

It requires whole-company focus. No one department can handle it alone. Everyone must pitch in.

CRITERION 4

It explains what, not how. Vision is the destination, not the route.

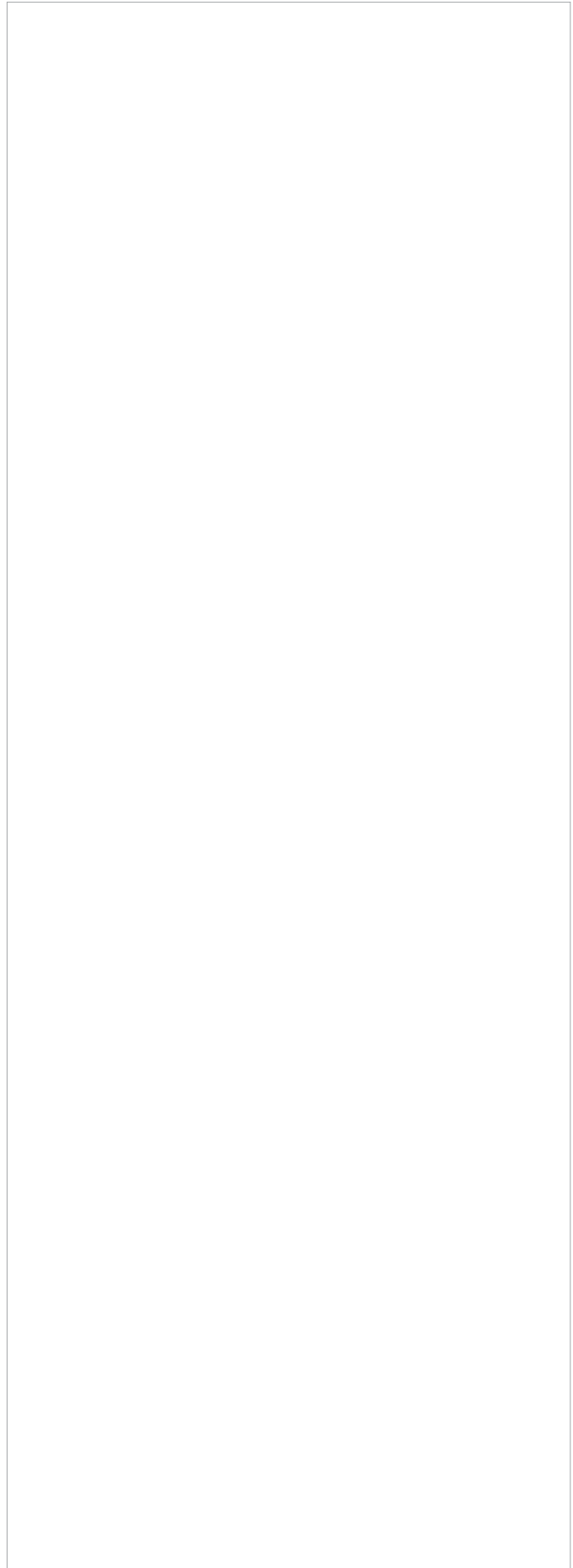
Once you've envisioned your future reality, you're ready for the final stage

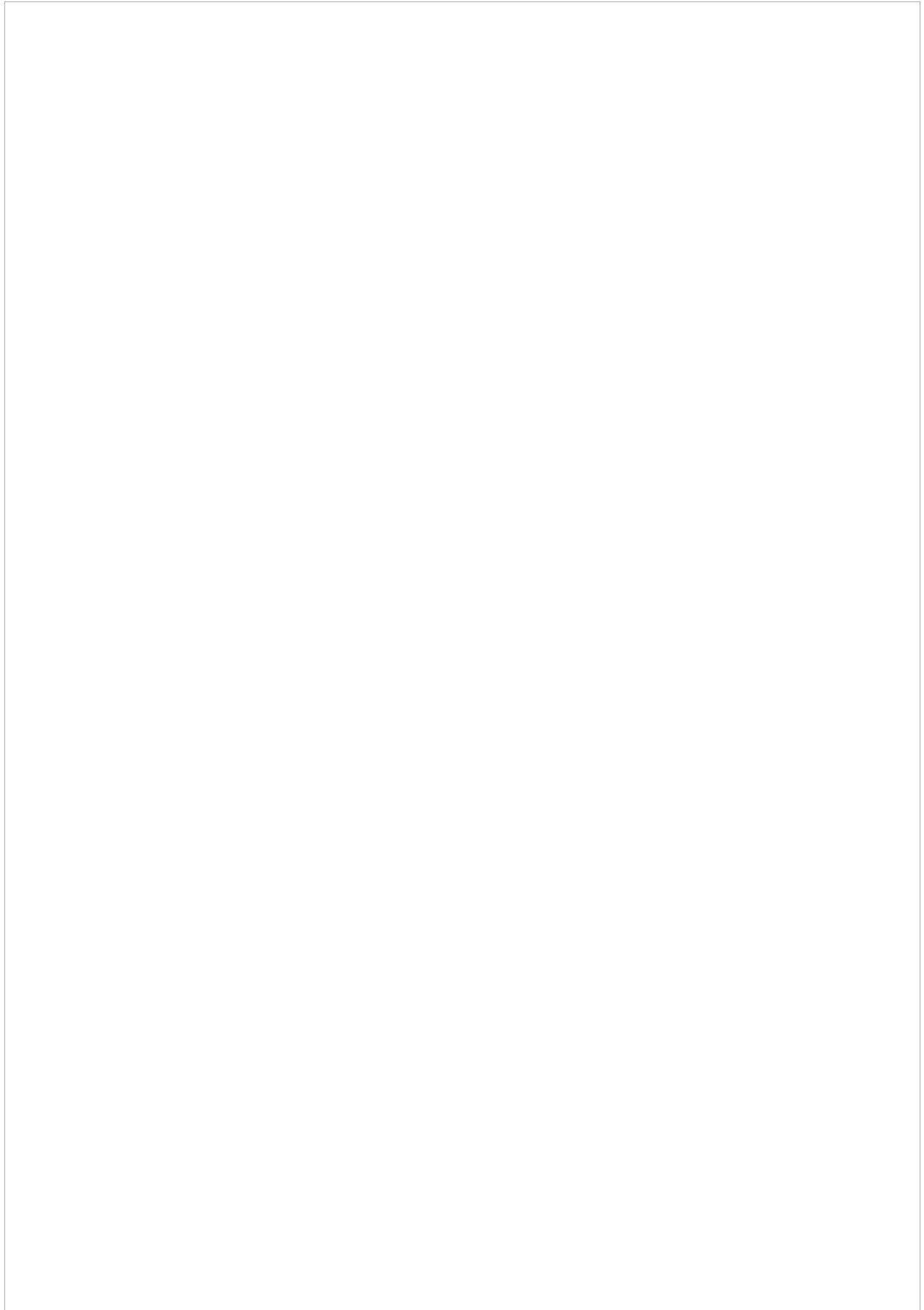
STAGE 4: PUT THE PIECES TOGETHER

Once the parts of your vision script are complete, it's time to compile them into a single document. First, copy-paste your mission and values. Next, copy-paste your current reality. Finally, copy-paste your future reality.

The final result should be modeled after page 103-107

Once you've walked through all four stages, it's time to celebrate. You have a completed vision script!



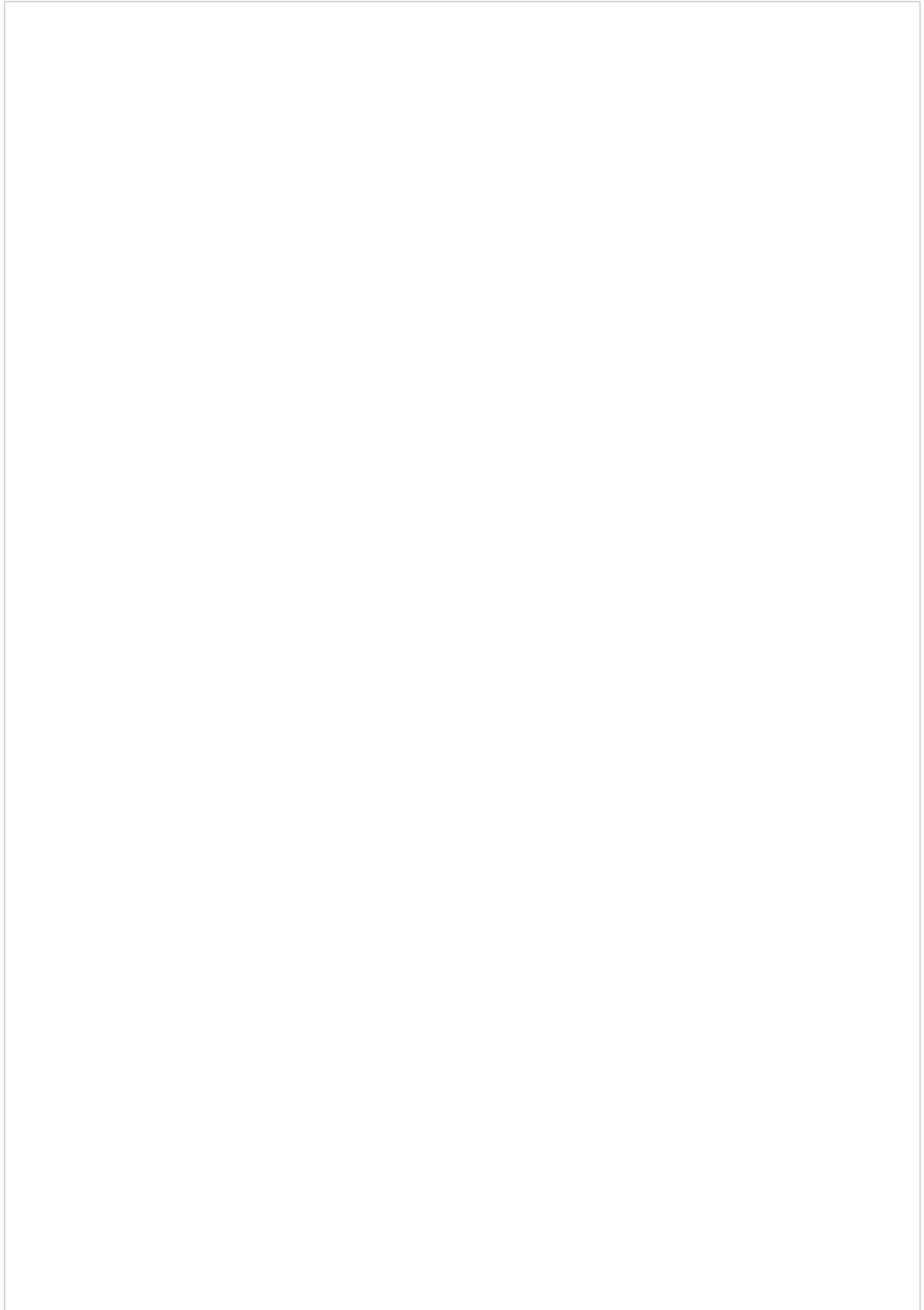


FINALIZING MISSION AND VALUES

You should have collected all pieces of your mission and values and current reality during **Step 1: Establish Strategic Context**. If you need to access any of the templates, you'll find them below:

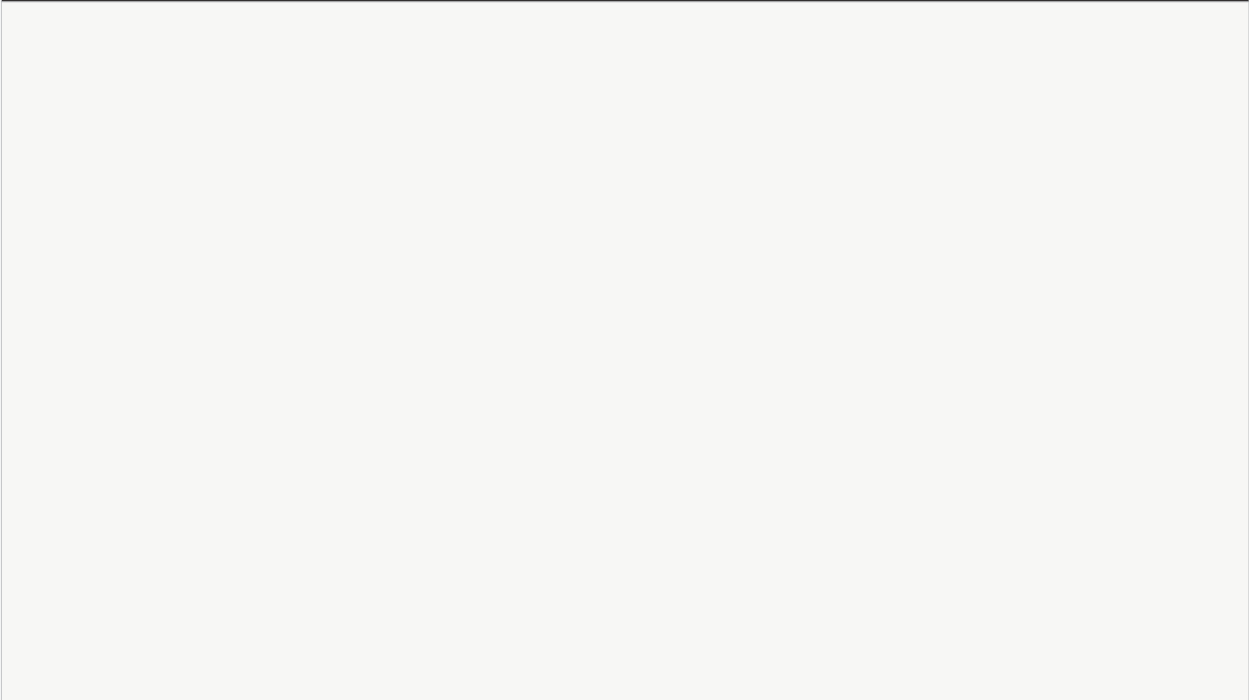
- [Template: Mission and Values](#)
- [Template: Product Details Form](#)
- [Template: Stakeholder Status](#)

MISSION AND VALUES: REVIEW
Why does your mission matter?
Why do your values matter?
Is there anything missing?

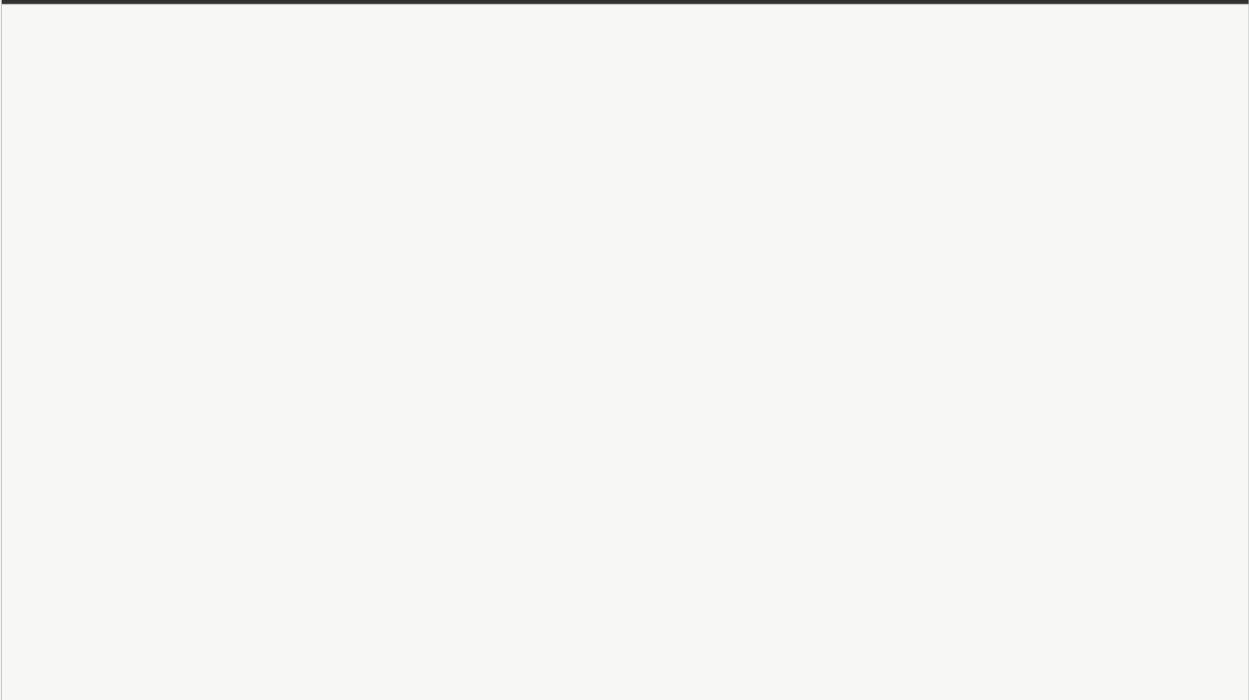


FINALIZING **CURRENT REALITY**

What stuck out to you during this readthrough?



What changes do you think should be made?

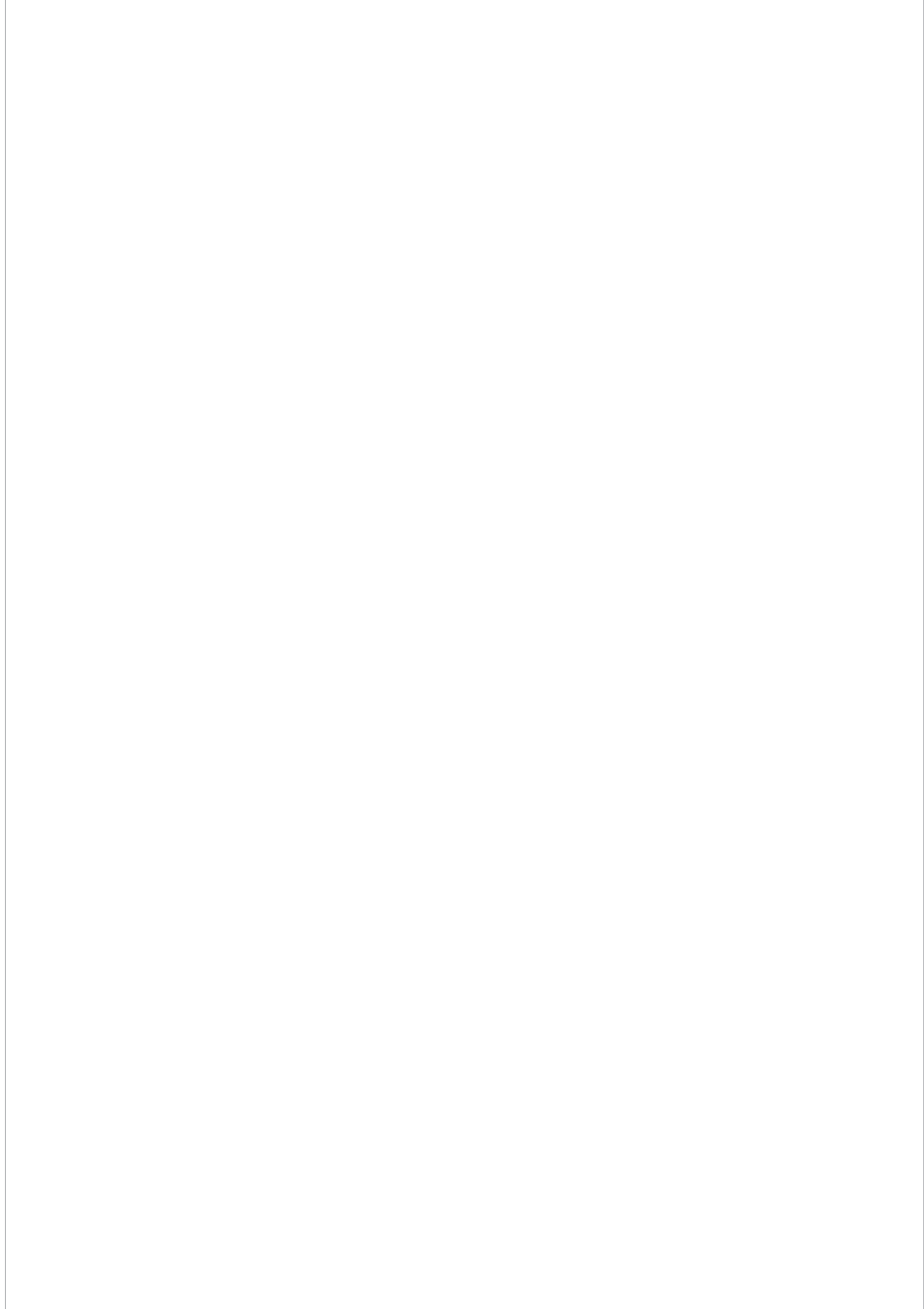


CREATING **FUTURE REALITY**

Create copies of the templates below and begin envisioning your future together

- [Template: Mission and Values](#)
- [Template: Product Details Form](#)
- [Template: Stakeholder Status](#)

What most excites you about your future reality?



PUTTING THE PIECES TOGETHER

You've now completed the three parts of a Vision Script. By finalizing your mission and values, you've defined who you are. By finalizing your current reality, you've defined where you are. By creating your future reality, you've defined where you're going.

The last step is to compile these parts into the document below. Once complete, your Vision Script should look like the Willow Run Real Estate example on the following pages.

COMPANY NAME
WHO WE ARE
MISSION
VALUES

WHERE WE ARE

RESULTS

PRODUCTS/SERVICES/PROGRAMS

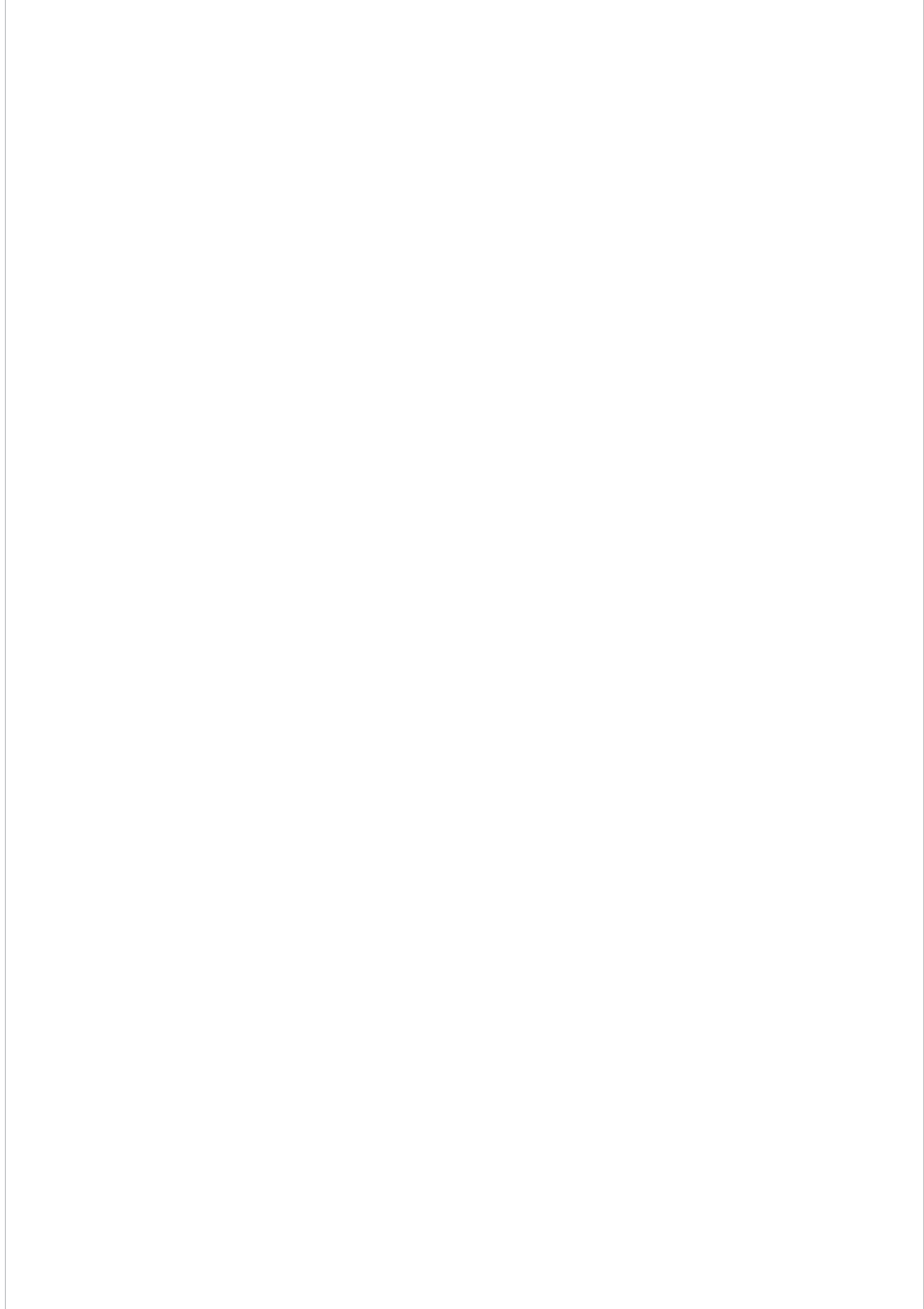
STAKEHOLDERS

WHERE WE ARE GOING

RESULTS

PRODUCTS/SERVICES/PROGRAMS

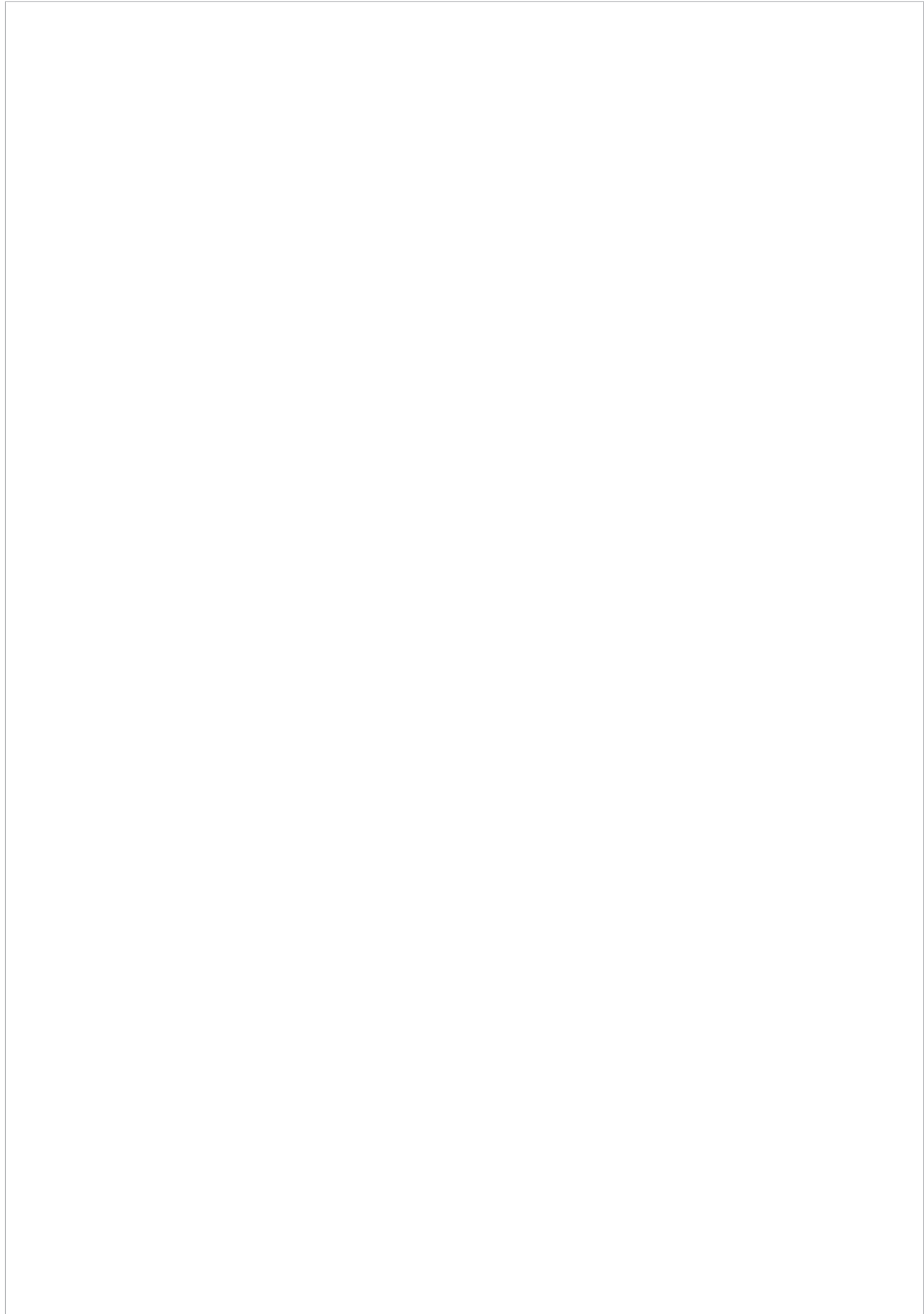
STAKEHOLDERS



CONCLUSION

1. What are your key takeaways from this process?

2. How will you keep your vision visible as you move forward?



VISION SCRIPT

SAMPLE

The following is an example of how to fill out your Vision Script.

COMPANY NAME WILLOW RUN REAL ESTATE

WHO WE ARE

MISSION

We are a full-service commercial real estate company. We create real estate solutions for industrial and office owners, lessors, and tenants. With our cutting-edge resources and skilled professionals, we connect our clients with their communities and give them the space and foundation to grow their businesses.

VALUES

1. **INCLUSIVITY.** We value a diverse culture where everyone belongs. Different backgrounds and experiences contribute to the strength of our team and allow us to serve our clients to the best of our ability.
2. **INTEGRITY.** We stand for what's right. No matter how much it costs, we own our mistakes, follow through on our commitments, and operate within industry laws and guidelines.
3. **INITIATIVE.** We don't settle. We are constantly seeking new opportunities and strategies for our clients.
4. **INNOVATION.** We regularly look for new and better ways to do things, never settling for the status quo. We challenge ourselves to consistently learn and grow and invest in team development.
5. **INSIGHT.** We intentionally stay up-to-date on current industry trends and technology, which ensures we are always prepared for what comes next.

WHERE WE ARE

RESULTS

We generated \$28.4 million in revenue and \$3.7 million in EBITDA (13%).¹

PRODUCTS/SERVICES/PROGRAMS

INVESTMENTS/SALES

DESCRIPTION	We represent several strong investment clients, which leads to business across all our service platforms. We offer seller and buyer services for investors and individual building owners.
WHY WE'RE EXCITED	We get most of our business word-of-mouth, because our clients are satisfied with our negotiations and how easy we make the selling and buying processes. We have a strong team that is continuing to grow this department. Right now this is our fastest-growing service. We grew 20% over the previous year and have added two new agents to this department. Digital tools have allowed us to be more efficient than ever with virtual tours and contract execution.
CUSTOMER	Industrial and office investors
SCOPE	2.5M square feet industrial; 3.8 M office
REVENUE	\$9.9M
PROFIT	\$1.3M
<h4>LEASING</h4>	
DESCRIPTION	We offer leasing services to our investment clients, which includes landlord representation and tenant representation.
WHY WE'RE EXCITED	This continues to be our most profitable service. We have decades of experience and repeat clients that contribute to the stability of our business. Digital tools have allowed us to be more efficient than ever with virtual tours and contract execution.
CUSTOMER	Industrial and office investors, tenants, and prospective tenants
SCOPE	18M square feet industrial, 15.4M office
REVENUE	\$11.4M
PROFIT	\$1.5M

PROPERTY MANAGEMENT	
DESCRIPTION	We offer property-management services, including on-site building maintenance, on-site and on-call security, budget management, accounting, inspections, and so on.
WHY WE'RE EXCITED	We've been able to offer full-service options to our clients for the past four years and have grown our client base significantly over that time.
CUSTOMER	Industrial and office vendors.
SCOPE	3.75M square feet industrial; 2.7M office
REVENUE	\$7.1M
PROFIT	\$925K
STAKEHOLDERS	
REAL ESTATE AGENTS (1099)	
WHY WE'RE EXCITED	We have a strong, loyal team whose average tenure is 12 years. Our compensation structure is fair and incentivizes our salespeople. We balance their experience as contractors well to make everyone personally feel a part of our mission.
NUMBER	24
DEMOGRAPHICS	68% men, 32% women, 80% white, 20% people of color
POPULAR BENEFITS	Compensation and incentive plans, office space
FULL-TIME EMPLOYEES	
WHY WE'RE EXCITED	We have a hardworking, enthusiastic team who stays on top of the latest technology and trends and works collaboratively to create a well-rounded and satisfying client experience. We experience very little turnover and have a culture of initiative and excellence.
NUMBER	42
DEMOGRAPHICS	72% women, 28 % men, 65% white, 35% people of color
POPULAR BENEFITS	Career development/education funds, flexible hours/remote work, 401k matching, health insurance benefits.

WHERE WE'RE GOING

RESULTS

We generated \$58.9 million in revenue and \$11.7 million in EBITDA (20%).

PRODUCTS/SERVICES/PROGRAMS

INVESTMENTS/SALES

DESCRIPTION	We represent several strong investment clients, which leads to business across all our service platforms. We've added a retail team to this service.
WHY WE'RE EXCITED	We get most of our business word-of-mouth, because our clients are satisfied with our negotiations and how easy we make the selling and buying processes. Our sales are worth \$2.5M+ on average. Our team has grown to support the growth of this department. We've grown 30% every year over the past three years and have added ten new agents.
CUSTOMER	Industrial, office, and retail investors.
SCOPE	4.3M square feet industrial, 4.8M office, 1M retail
REVENUE	\$20.6M
PROFIT	\$4M
LEASING	
DESCRIPTION	We offer leasing services to our investment clients, which include landlord representation and tenant representation. With the addition of retail clients in our investments and sales department, we've also expanded our leasing client base.
WHY WE'RE EXCITED	This continues to be our most profitable service. Our renewal rates have grown by 26%. Our clients consistently refer colleagues to us for their tenant representation needs. We've developed proprietary digital tools to create an industry-leading experience for investors and prospective tenants.
CUSTOMER	Industrial, office, and retail investors, tenants, and prospective tenants.
SCOPE	22.3M square feet industrial, 19M office, 3.5M retail.
REVENUE	\$23.6M
PROFIT	\$4.7M

PROPERTY MANAGEMENT	
DESCRIPTION	We offer property-management services, including on-site building maintenance, on-site and on-call security, budget management, accounting, inspections, and so on. We have added retail to our list of services.
WHY WE'RE EXCITED	We manage every building where we represented the buyer in an investment sale. Due to our incentive program for on-site managers and engineers, we have better customer service than ever before.
CUSTOMER	Industrial, office, and retail investors.
SCOPE	4.5M square feet industrial, 3.5M office, 1.5M retail
REVENUE	\$14.7M
PROFIT	\$2.9M
STAKEHOLDERS	
REAL ESTATE AGENTS (1099)	
WHY WE'RE EXCITED	We have a strong, loyal team of contractors. Our compensation structure is fair and incentivizes our salespeople. We balance their experience as contractors well to make everyone personally feel a part of our mission. We now have a sales team that focuses on the retail industry.
NUMBER	35
DEMOGRAPHICS	50% men, 50% women, 65% white, 35% people of color
POPULAR BENEFITS	Compensation and incentive plans, office space, and a variety of convenient office amenities, such as free healthy snack options, food truck visits, and cutting-edge technology
FULL-TIME EMPLOYEES	
WHY WE'RE EXCITED	We have a hardworking, enthusiastic team that stays on top of the latest technology and trends and works collaboratively to create a well-rounded and satisfying client experience. We experience very little turnover and have a culture of initiative and excellence. We now have a project management team that is skilled in retail. We also have an in-house research team.
NUMBER	52
DEMOGRAPHICS	60% women, 40% men, 50% white, 50% people of color
POPULAR BENEFITS	Career development/education funds, flexible hours/remote work, 401K matching, health insurance benefits, adoption benefits, gym memberships, and an on-site cookie machine