

Leading a Customer-Centric Culture

with Jeff Toister

Vision Writing Agenda

Use this worksheet to guide your meeting to write a customer service vision for your organization, department, or team.

Participants: Seven to ten participants, representing various levels and roles

Meeting Time: Two hours

Goal: To write a customer service vision statement

Step	Output
Step 1: Share the Word Cloud Prior to this meeting, it's a good idea to gather input from all employees. This input can be put into a word cloud graphic and shared at the meeting.	Discuss key words and themes from the word cloud:
Step 2: Write The Vision Write a rough draft of the customer service vision statement.	Rough draft:
Step 3: Compare to Criteria Compare your draft vision to the criteria on the right. Revise your vision as needed.	Characteristics of a great vision: <ul style="list-style-type: none">• It is simple and easily understood.• It is focused on customers.• It reflects both who we are now and who we aspire to be in the future.

Bonus Activity: It's also helpful to share stories and examples of employees living the customer service vision in their daily work. This can help make the vision statement more concrete and specific.
