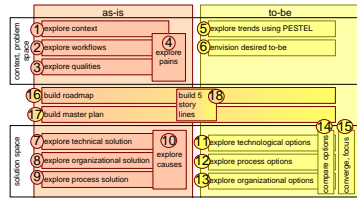


# Vision-Workshop How To

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## Abstract

A workshop to determine the vision of an organization requires a shared understanding of the current context and solution, the desired future situation, and a way from current to future situation. This presentation offers a multi-step approach to run such a workshop.

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# 1 Introduction to Vision-Workshop How to

This presentation is the result of reflecting on facilitating workshops to develop a vision in multiple domains, such as (health) care, defense, and research. These organizations are at various levels in the ecosystems of ecosystems.

Capturing the de facto methodology that I as facilitator applied, results in this rather structured diagrams. Reality is more chaotic and the application other facilitators should use is more “organic”.

## 2 Method for Vision-Workshops

For workshop preparation and facilitation read [3] Initially participants in the workshop explore the as-is and the to-be situation, for the context (the problem space) and the solution. They use the findings to build a roadmap, master plans, and communicable storylines. Figure

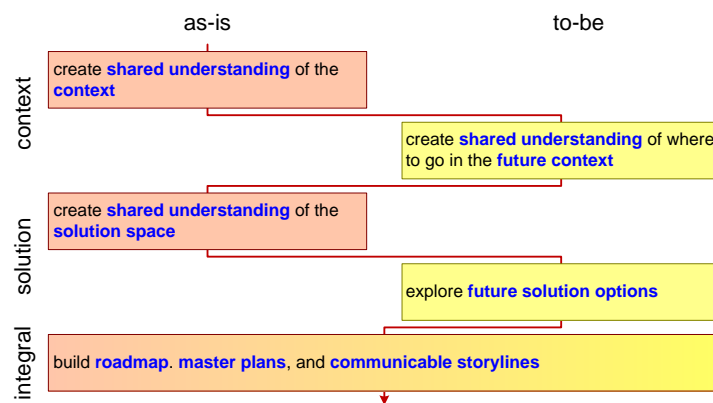


Figure 1: The main method for vision-workshops

The facilitator has to ensure that the participants step out far enough into the context. My experience is that most participants by default only look at their direct environment. The facilitator also has to focus the participants first on the as-is situation. A pitfall is that participants escape in a future exploration without having a baseline, nor a clear view on as-is problems and strengths.

When exploring the future solution, the facilitator has to build in a step to ensure that participants explore multiple solution. Jumping on the first solution is seductive for many.

The as-is and to-be for the context and the solution space form the beginning of a roadmap [1]. A roadmap is envisioning the path forward over many layers from context and solution space, to process and organization. The roadmap needs elabo-

ration for the near-term in master plans that are more actionable and committal for the involved parties. Roadmaps and master plans can be quite overwhelming. For that reason we construct a number of simplified storylines from trigger in the context to an envisioned solution with its consequences in process and organization.

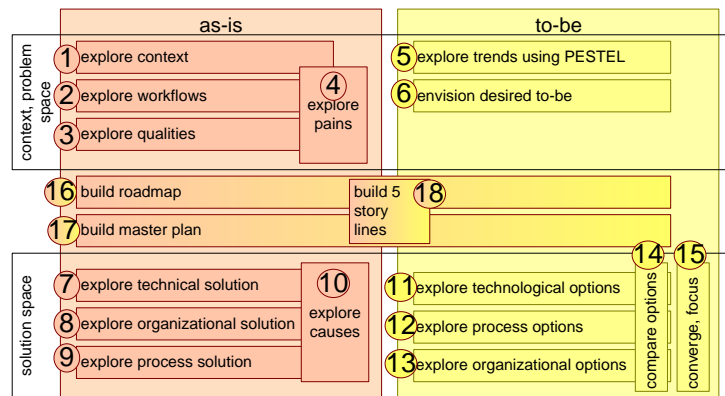


Figure 2: More detailed method for vision-workshops

Figure 2 elaborates the method in much more detailed steps.

1. Explore the context, e.g. make a stakeholder map and a systems context diagram, and identify relevant environmental aspects.
2. Explore workflows, especially the typical workflow, e.g. the primary process.
3. Explore qualities, e.g. what are the Key Performance Indicators.
4. Explore pains, e.g. where are dissatisfied stakeholders, hiccups in workflows, KPIs that the organization doesn't fulfill?
5. Explore PESTEL trends, e.g. what significant events do we foresee happening in the PESTEL perspectives?
6. Envision a desired to-be in the context and express them in a few keywords.
7. Explore technical solution through block diagrams and behavior diagrams.
8. Explore the internal organization by making an organizational map.
9. Explore internal processes by mapping the main workflows.
10. Explore causes by relating the pains in the context to the internal way of working.

11. Explore options for technical solutions.
12. Explore options for process solutions.
13. Explore options for organizational solutions.
14. Compare options using a decision matrix with criteria and scores.
15. Converge by reducing the options in a moderated discussion.
16. Build a roadmap consisting of at least 5 layers.
17. Build master plans for the near term with concrete steps that involved parties can commit to.
18. Build about 5 story lines with the purpose to ease communication to a wide audience.

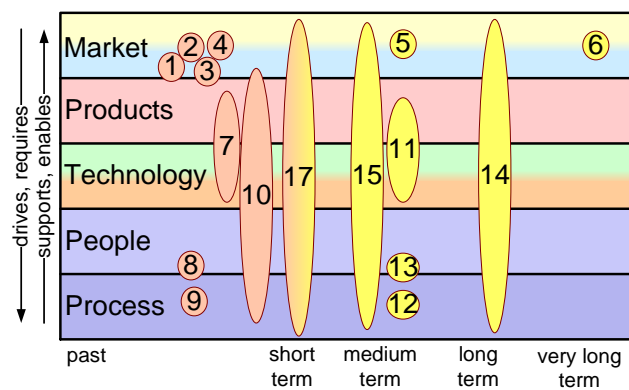


Figure 3: Mapping the detailed method steps on the roadmapping framework

Figure 3 maps the same steps on the roadmapping framework. Figure 4 elaborates the detailed method as a workflow with information entities flowing between the steps.

## References

- [1] Gerrit Muller. Roadmapping. <http://www.gaudisite.nl/RoadmappingPaper.pdf>, 1999.
- [2] Gerrit Muller. The system architecture homepage. <http://www.gaudisite.nl/index.html>, 1999.

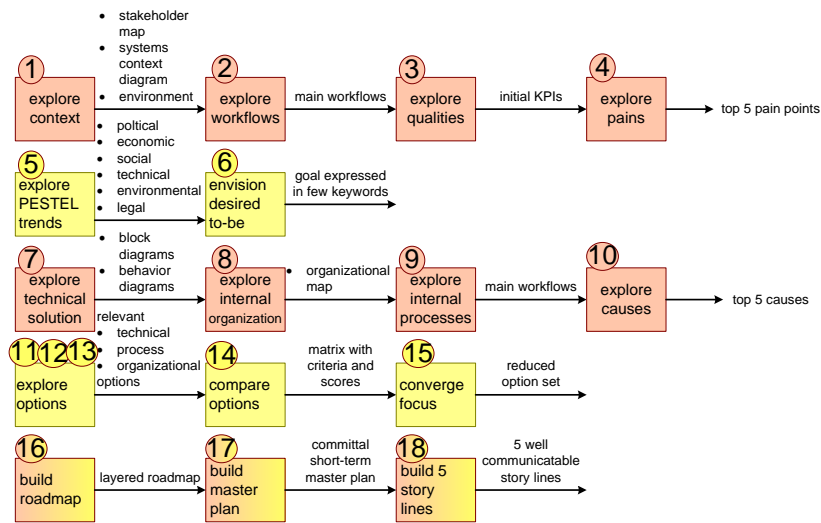


Figure 4: The method elaborated as a workflow with information entities flowing between the steps

[3] Gerrit Muller. Workshop how to. <https://gaudisite.nl/WorkshopHowToPaper.pdf>, 2003.

## History

**Version: 0.3, date: May 24, 2026 changed by: Gerrit Muller**

- added Article version

**Version: 0.2, date: June 1, 2025 changed by: Gerrit Muller**

- added VWHTrecommendations

**Version: 0.1, date: May 30, 2025 changed by: Gerrit Muller**

- Added VWHTsolutionERD

**Version: 0, date: May 17, 2025 changed by: Gerrit Muller**

- Created, no changelog yet