

XYZ Financial Services Company, Inc.

Vision: November 30, 201_

XYZ is a _____ company, pre-eminent in its ability to anticipate and respond to the needs of individuals and businesses.

We stand for security, peace of mind, quality and cost containment. Because of our accessibility, our clients feel as if they are the only client we have.

We are viewed as trusted advisors, distinguished by our integrity, expertise and care for clients.

We provide easier and cost-effective access to services through innovative use of technology.

We are a high-performance organization that understands what is expected, seeks to exceed those expectations and is accountable for achieving results.

By monitoring both company and individual performance, we have refined management processes and focused employee knowledge to improve operations. As a result, we have ____% client retention and a superior rate of customer satisfaction.

We are a company where people enjoy coming to work, can work with dignity and with the respect of their co-workers, and where people feel they contribute to the success of the organization.

XYZ operates on a sound basis of profitable growth and shares its prosperity with those who help create it.

Note: here is another way of looking at a vision statement:

SAMPLE VISION STATEMENT

What We Need to Become

A) Externally / XYZ in the Marketplace

A profitable, efficient provider / manufacturer of _____. A company that is innovative, quick-to-market, responsive to market demand, customer-oriented. A company with good brand recognition in its target market areas and in the trade, with effective channels of distribution for its services / products.

B) Internally / XYZ as a Place to Work

A company where people enjoy coming to work, can work with dignity and with the respect of their co-workers, where people feel that they contribute to the success of the company and can make a difference.

A team of capable and effective individuals working together and supporting each other through both good times and adversity to achieve clearly-defined goals. A team whose members build each other up and support each others' efforts at growth and improvement, and that constructively solve conflict and communication problems.

C) Financially

Last, but not least, a company operating on a sound financial basis of profitable growth that shares its prosperity with those who help create it.