THE VISION THING:

AN EXPERIENTIAL EXERCISE INTRODUCING THE KEY ACTIVITIES PERFORMED BY LEADERS

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A useful way to introduce the topic of leadership is to understand how leaders differ from managers. We present an original exercise to help students distinguish the activities of leaders and managers in a fun and engaging manner. Participants are assigned leader, manager, and employee roles. The leader crafts a vision and works with the manager to translate it into a tangible product. The manager then directs the employee on how to implement the vision using a toy construction set. A pre- and posttest assessing learning with undergraduate business students suggests that the exercise is an effective teaching tool.

> "Management is doing things right; leadership is doing the right things"
>
> — Peter Drucker

Introduction

Leadership "is a process whereby an individual influences a group of individuals to achieve a common goal" (Northouse, 2013, p. 5). Leaders set the direction for the organization and influence others to gain support for the chosen direction. In contrast, managers focus on how the leader's direction can be implemented. Many management textbooks (e.g., McKee, 2011; Northouse, 2013; Whetten & Cameron, 2011) introduce the topic of leadership by distinguishing the activities of leaders and managers. Leaders establish direction, align people, and motivate others, whereas managers plan and budget, organize and staff, and control and solve problems (Kotter, 2001). The current article describes an experiential exercise using a toy construction set to illustrate and distinguish the activities of leaders from the activities of managers.

Exercises using toy construction sets are effective to demonstrate a wide array of management concepts (e.g., Coff & Hatfield, 2003; Lindsay & Enz, 1991; Smrt & Nelson, 2013). In particular, such activities—often labeled as "play"—are an important part of leadership development programs (Kark, 2011). Though there are other exercises (e.g., McNeely, 1994) that illustrate the activities of leaders and managers, these articles treat the roles of leaders and managers as identical and do not focus on articulating the distinction between these roles.

The exercise described in the current paper provides an effective way to illustrate the activities of leadership and contrast these activities with the activities of management by leveraging "play." The current exercise incorporates qualities that allow for the effective use of "play" (Miller, 1973)—the exercise is enjoyable, focuses on the process, and does not have a specific measurable outcome, so as to allow the participants to concentrate on the experience. In addition, the exercise provides a way to introduce a variety of practical leadership concepts by allowing participants to experience the process of articulating and implementing a strategic vision.

Theoretical Background

The primary objective of leaders is to prepare organizations for change and help cope with the challenges involved in making the change (Kotter, 1990; Kotter, 2001; Kouzes & Posner, 2007). To prepare organizations for change, leaders must perform three activities. First, leaders set direction, which involves crafting the vision or desired future state for the organization (e.g., Baum, Locke, & Kirkpatrick, 1998; Maccoby, 2000). Typically, a vision is a concise statement defining the long-term goals of the organization (Kaplan & Norton,

2008). By creating an image of the future, the vision guides employee behavior and suggests what tasks need to be performed to achieve this vision.

Once leaders have developed a vision, their focus shifts to articulating the vision throughout the organization. As such, the second activity performed by leaders is to gain acceptance for the designated vision (i.e., align people). Gaining acceptance involves communicating the vision, seeking commitment from others in the organization, and building a coalition of advocates. Aligning people is primarily a communications challenge as only an effectively communicated vision will empower followers (Conger & Kanungo, 1987). Specifically, the articulation of a vision affects followers in three ways (Strange & Mumford, 2002). First, articulation of a vision provides a common identity and sense of purpose. Second, by communicating a desired end state and what needs to be done to reach this end state, employees are better able to coordinate their activities. Third, articulating the vision serves as a basis for the creation of new norms within the organization.

Communicating the vision is only the start of the challenge—there are likely to be additional challenges to fully implementing the vision throughout the organization. As such, the third activity of leaders is to continuously motivate and inspire those advocating for the vision. Significant progress can be made to help bring the leader's vision to reality by enlisting, supporting, and recognizing the successes of others who are involved in how to achieve the vision.

Whereas leaders prepare organizations for change—by setting the direction, aligning people, and motivating and inspiring people—managers focus on the challenges of implementing the organization's vision. Specifically, managers perform three activities. First, managers plan and budget, which involves setting goals, determining what steps are needed to achieve the established goals, and allocating resources to ensure the goals can be completed successfully. The second activity performed by managers is to organize and staff. More specifically, organizing and staffing involves creating roles and reporting relationships, placing people into these newly created roles, and establishing the rules and procedures for how the work will be performed. The third activity of managers is to control and solve problems.

Managers develop incentives to ensure that established rules and procedures are being followed and help find solutions to any problems that arise.

It is worth noting there may be an overlap in the activities performed by managers and leaders. For instance, Mintzberg (1973) found that managers are responsible for motivating employees. Managers may perform leadership activities when influencing others in pursuit of a goal, and leaders may perform management activities when participating in planning and organizing efforts. The overlap in the activities performed by leaders and managers is also acknowledged by Kotter (2001), who suggests firms create "leader-managers." The intent of the current exercise is not to suggest these roles are distinct, but simply to provide a way to discuss the activities performed by leaders and managers to create a starting point for additional conversations about leadership.

The Vision Thing Exercise

The Vision Thing exercise is designed to allow students to experience the activities performed by leaders and managers and serve as a platform for discussing important issues, such as planning and strategy, culture, teams, communication, and organizational structure. This section provides an overview of the exercise and its learning objectives and details how to implement the exercise in the classroom.

OVERVIEW

The exercise involves creating a three-tiered hierarchical organizational structure. One person is the chief executive officer (CEO), another is the manager, and a third person is the employee. The CEO prepares a vision statement in advance and works with the manager to determine how to translate the vision to a tangible "product" using the toy construction set. The manager then guides the employee on building the "product." The process is iterative in nature—the manager can communicate with the CEO and employee as often as necessary. But there is a finite amount of time available to implement the vision. Once the exercise is complete the team comes together to examine how close the team came to implementing the CEO's vision.

It is recommended to start with a brief discussion on leadership by asking students to discuss what leadership

means and provide examples of effective leaders. If only a single round is conducted, the exercise can be run in 60–75 minutes. For a richer experience, 120–150 minutes should be allocated for the exercise and discussion so students can take on more than one role and experience the task from multiple perspectives. Although the exercise is described here with three-person teams and one person in each role, the exercise can be modified by assigning more than one person to the role of manager or employee without any loss of effectiveness.

The learning objectives of the current exercise are:

- To understand the distinct, yet complementary roles of leaders and managers

- To appreciate the challenges involved in articulating a vision

- To learn the difference between a vision and a strategy

INSTRUCTOR PREPARATION

Some advance preparation is required. First, the instructor will need toy construction sets (e.g., K'Nex, Legos, Tinkertoys) so students can build products. Second, the classroom must be organized with sufficient space for students to spread out so teams can have conversations without affecting other teams.

CONDUCTING THE EXERCISE

Implementing the Vision Thing exercise involves six steps, described next.

Step 1: Preclass Homework Assignment

Students must create and bring to class a vision. A sample homework assignment, including examples of vision statements from well-known firms, can be found in Appendix A.

Step 2: Introduction (5–10 minutes)

Start the class by introducing the concept of leadership. Before presenting a definition, ask the students to attempt to define leadership, to indicate what qualities are essential to effective leadership, and to come up with a list of challenges leaders face. The discussion can be further enriched by incorporating examples of leaders mentioned frequently in the media and asking students about leaders in their workplaces.

Step 3: Overview of the Vision Thing Exercise (10–15 minutes)

Next, group the students into teams and ask the newly formed teams to sit together. Once the teams have been created, inform students that each team is an organization and one person will play the role of CEO, another will play the role of the manager, and the last member will play the role of the employee.

Next, explain the objective: for the organization to create a tangible product implementing the CEO's vision. As in most real-world organizations, CEOs rarely have the time to meet with each employee individually, so in the current exercise the CEO will communicate his/her vision to the manager, who will work with the CEO to determine what product can be created to effectively implement the vision (i.e., a product-level strategy). The manager then guides the employee to create a mock-up of the product using the toy construction set. For instance, one team started with a vision "to encourage a healthy lifestyle" and used the toy construction set to build a mock-up of an electronic fitness armband. Another team started with a vision of "making golf equipment for the masses" and used the toy construction set to build an adjustable golf putter. Both the angle of putter and the height of the club were fully adjustable to accommodate the user's unique characteristics.

After giving students a chance to ask questions about the overall structure of the exercise, present additional rules for the persons playing each role. CEOs can only communicate with their managers and cannot directly talk to their employees. Managers can only guide the employees on how to implement the vision. Managers cannot assist with the building of the product. Managers can gather component pieces for the employees. But once the component pieces have been delivered to the employees, managers can no longer physically touch the pieces. Employees must implement the strategy as they understand it based on instructions provided by the managers. Employees cannot allow managers to touch the component pieces.

Finally, students should be given tips on how to allocate their time. Twenty minutes is usually sufficient to conduct one round of the exercise. As such, CEOs and managers should spend no more than 5 minutes discussing the vision and formulating the product-level strategy. Managers should spend no more than 5 minutes planning how to guide the employee to implement the product-level strategy and determining which component pieces are needed. The remaining 10 minutes should be used for the employees to meet with managers and build the product.

Step 4: Conducting the Exercise (20 minutes for each round)

Once the rules have been explained and clarified, the exercise can be conducted. To the extent possible, try to physically separate the CEOs from the employees to avoid any interactions. Possible ways to separate the CEOs and employees include conducting the exercise in a large classroom, securing a second classroom, or asking the CEOs to meet with their managers in the hallway outside the classroom. Time permitting, students should share their vision, product-level strategy, and resulting product with the rest of the class after each session.

If there is time to complete another round, ask students to return the component pieces, change roles or teams, and conduct another session. During the additional session, the team should be striving to implement the new CEO's vision. Additional rounds can also be conducted with slight changes to the rules, such as creating teams with two employees reporting to a manager or two managers reporting to a CEO or asking CEOs to change teams.

Step 5: Debrief (15–25 minutes)

Once the exercise is complete, instructors should lead a discussion about the experience and reinforce the activities of managers and leaders. A suggested list of discussion questions is as follows:

- CEOs: What did you do to get your managers to align themselves with your vision?

- CEOs and Managers: What was the process like to transform an abstract vision into tangible strategy?

- Managers: How did you go about determining what resources were needed to build the product? How did you go about guiding the employees to build the product? How often did you go back to talk with the CEO? How did you keep track of your employees' progress?

- Employees: How did your manager communicate with you? What challenges did you face in communicating with your manager? Would it have mattered if you had been able to meet directly with the CEO?

- Everyone: What do you see as the differences between the roles of CEO and manager?

- Everyone: What are the challenges involved in completing the Vision Thing exercise successfully? What could have been done to mitigate these challenges?

- Everyone: What are the leadership lessons in the Vision Thing exercise for you personally?

In addition to communicating the activities performed by managers and leaders, the Vision Thing exercise can be a platform for discussing at least four other leadership topics. First, exploring the process of how the CEO's vision was translated to a tangible product clarifies the differences between a vision and a strategy. Because visions are typically abstract (Baum et al., 1998) and never fully achieved (Kirkpatrick & Locke, 1996), a discussion of students' experiences typically reveals that the most effective teams quickly determined a way to narrow the scope of the vision, thereby making it more concrete, and proceeded to formulate a strategy to implement the narrower vision.

Second, the exercise highlights how the structure of an organization can significantly affect the challenges involved in implementing a vision. For example, students may mention how the CEO felt he/she was able to communicate the vision effectively to the manager, but things appeared to break down when the manager spoke to the employee. Similarly, if a team had two managers or two employees, the discussion can focus on the additional complexity posed by changing the organizational structure.

Third, if the teams were self-selected or CEOs were moved to new teams in successive sessions, the exercise can highlight the importance of culture and cultural fit

in an organization's success (Chatman & Cha, 2005). If self-selected teams are employed, students are likely to discuss the positive benefits of teaming up with people they have worked with in the past. If teams received new CEOs in successive iterations of the exercise, students are likely to discuss the difficulties they faced working within an existing set of norms and behaviors. Students who were managers and employees are likely to point out the challenges of getting their new CEOs to adopt their existing culture.

Fourth, because the entire class shared the same component pieces, the students are likely to mention the issue of resource availability. A discussion on the challenges students faced by being required to share the same component pieces can be used to highlight that leaders often assume employees have resource endowments that may not actually exist and some visions may be impractical given the existing capabilities of the organization. In addition, the point can be made that managers who use more than their fair share of the resources may hinder the success of other business units within the organization.

Finally, students should have the opportunity to do some self-reflection on their experience. Self-reflection can be encouraged by asking how students addressed the following issues: time pressure, communication, willingness to delegate, patience, and tolerance for ambiguity. In addition, ask students to suggest best practices for effectively dealing with each situation to further facilitate learning.

Classroom Testing

To assess the exercise's effectiveness, a four-question pre- and posttest quiz (Appendix B) was given over the course of three academic terms to a total of 93 undergraduate students enrolled in an upper-division undergraduate leadership course at a university in the western United States. The pretest was done at the start of class, and the posttest with the same questions was done after the exercise and debrief. The sample was 83% male, 53% Caucasian, 22% Hispanic, 20% Asian, 3% Middle Eastern and 2% African-American, with 5.3 years spent in college and an average age of 24.4.

Because the questions in the pre- and posttest questionnaire were open ended, the responses about the activities of leaders and managers (i.e., questions two and three) were evaluated based on whether each activity of a leader or manager was discussed. Specifically, the responses were evaluated to determine whether the following activities of leaders were discussed: set direction, align people, and motivate and inspire. Also evaluated was whether the following activities of managers were discussed: plan and budget, organize and staff, control and solve problems. For each activity discussed correctly—either using the same terminology or alluded to using different language—a score of 1 was assigned. For each activity not discussed, a score of zero was given.

A paired samples t-test compared the mean number of students who correctly identified each activity, as determined by examining answers for questions two and three on the pre- and posttest questionnaires for the

	Pretest score		Posttest score		t-test results
Activity	**M**	**SD**	**M**	**SD**	**t-value**
Leaders set direction	0.26	0.44	0.83	0.38	−10.18***
Leaders align people	0.08	0.27	0.25	0.43	−3.63***
Leaders motivate and inspire	0.40	0.49	0.58	0.50	−2.56**
Managers plan and budget	0.38	0.49	0.83	0.38	−7.50***
Managers organize and staff	0.29	0.46	0.42	0.50	−1.92*
Managers control and solve problems	0.34	0.48	0.55	0.50	−2.88**

Table 1. Vision Thing Exercise Pre- and Posttest Scores for Sample

Notes: Table 1 summarizes the pre- and posttest scores for the sample (N=93), indicating the mean number of students who correctly identified each activity. Whether a particular activity was correctly identified was determined by examining responses to questions two and three on the pre- and posttest questionnaires (Appendix B) and assessing whether the three activities of leaders (set direction, align people, motivate) and three activities of managers (plan and budget, organize and staff, control and solve problems) were discussed. For each questionnaire, if a particular activity was discussed, a score of 1 was assigned. If an activity was not discussed, a score of 0 was assigned. ***indicates p < .001, **p < .01, *p < .05.

sample, as reported in Table 1. These findings suggest that the exercise and debrief conveyed the key differences between the activities of leaders and managers. More than 80% of the sample correctly identified that leaders set direction whereas managers plan and budget. More than 55% of the sample understood that leaders motivate and inspire whereas managers control and solve problems. Because the exercise has preassigned teams and a time constraint, it is not surprising that the leadership activity of aligning people and the management activity of organizing and staffing were not conveyed as clearly as the other activities.

In addition to effectively learning key differences between managers and leaders, the students rated the Vision Thing exercise very favorably. In response to whether the students would recommend the exercise be used in the future, where 1 was *definitely not* and 10 was *definitely*, the exercise received a mean rating of 9.1/10. Students also found the exercise to be interesting, giving the exercise a mean rating of 8.8/10, where 1 was *not interesting* and 10 was *very interesting*.

Conclusion

The current paper presents the rationale and procedure for a classroom role-playing exercise that engages students and facilitates the internalization of the different activities of leaders and managers. A simple pretest and posttest indicated the Vision Thing exercise was effective at conveying a rudimentary understanding of the differences between managers and leaders.

In addition to being an effective way to introduce the topic of leadership in the classroom, the Vision Thing exercise can be generalized and used outside the classroom. Specifically, the Vision Thing exercise can be used in a corporate setting to highlight the importance of at least three qualities that leaders must possess. First, the current exercise can be used to discuss the appropriate level of abstraction for communicating a vision (Collis & Rukstad, 2008; Gadiesh & Gilbert, 2001). CEOs who go into a great deal of detail when articulating their visions may overwhelm and limit the decision-making authority of managers. In contrast, CEOs who are too vague may leave their managers with little sense of direction on how to implement the stated vision. The experience of participating in the Vision Thing exercise can be used to lead a discussion on the consequences of using different levels of abstraction when communicating a vision and what factors can help determine an appropriate level of abstraction in a given context.

Second, the current exercise can be used to demonstrate the importance of obtaining feedback from others. Communicating a vision is not a unilateral activity. In order to effectively align others, CEOs should be open to adjusting their initial vision and how it is being communicated based on feedback from others in the organization (Ancona, Malone, Orlikowski, & Senge, 2007). Specifically, CEOs should seek feedback to assess whether the vision is being understood as intended and whether others in the organization believe that the organization has the capabilities to successfully achieve the designated vision.

Finally, the Vision Thing exercise can be used in corporate settings to illustrate the importance of the resource allocation process. Exercise participants inevitably discuss frustrations in obtaining the desired component pieces and the role the resource allocation process played in determining how the vision was executed. By leading a discussion on the different ways in which resources may be allocated and how these allocation strategies affect the manner in which the vision is implemented, the topic of strategy as really being about how the resource allocation process is managed can be introduced (Noda & Bower, 1996). In conclusion, the Vision Thing exercise offers value for both educators and practitioners.

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Appendix A. Sample Homework Assignment

1. What is your company's name?

2. What is your company's vision statement?

A vision statement articulates the company's direction and guides employee behavior. An effective vision statement is 1 or 2 sentences in length and is brief, clear, abstract, challenging, future oriented, and is able to inspire others.

The following are some sample vision statements from other firms:

- Build the best product, cause no unnecessary harm, use business to inspire and implement solutions to the environmental crisis. (Patagonia)

- To be the company that best understands and satisfies the product, service, and self-fulfillment needs of women—globally. (Avon)

- To be the world's most dynamic science company, creating sustainable solutions essential to a better, safer, and healthier life for people everywhere. (DuPont)

- The world's premier food company, offering nutritious, superior tasting foods to people everywhere. (Heinz)

- To be the number one athletic company in the world. (Nike)

- To empower people through great software anytime, anyplace, and on any device. (Microsoft)

- To organize the world's information and make it universally accessible and useful. (Google)

Appendix B. Pre- and Posttest Questions

1. What is the purpose of a vision statement?

2. What are the key activities of a leader?

3. What are the key activities of a manager?

4. What are the implications of these differences in the workplace?