Vision, Clarity, Action Sheet

Scope: ☐ Team ☐ Department ☐ Organization ☐ Initiative

Date: _____ **Completed by:** _____

Use it when

You know where you're going, but the work isn't moving. People aren't sure of priorities or roles, decisions stall, or plans aren't producing results. This sheet answers one question: what's the first action, who owns it, and how will we know it worked?

Time and people

About 20 minutes. The leader drafts it, and the team checks that this action is clear before anyone acts on it.

How it works

1. Vision: write what success looks like, plainly enough that someone outside the team would understand it.
2. Clarity: spell out priorities, who does what, expectations, and limits.
3. Don't move to Action until Vision and Clarity are specific enough for someone else to follow.
4. Action: set the first action, an owner, and a date.
5. Results: set the measure, then review it on the date you chose.

Vision

What does success look like?

Clarity

What are the priorities, in order?

Who	Is responsible for what

What are the expectations?

What limits must everyone understand (time, money, people, rules)?

Test it. Ask someone who didn't write the plan to explain the first action, the owner, and the expected result.

Could they explain it? ☐ Yes, move to Action ☐ No, sharpen Vision and Clarity first

Action

What's the first action?

Owner: _____

Date: _____

Results

What measure will show whether the action worked?

Target (what result counts as success): _____

Review date: _____

What actually happened?

Write what happened before you choose.

Did it move us toward the Vision?

☐ Yes, set the next action ☐ Partly, adjust and retry

☐ No, find what failed and revisit Vision, Clarity, or Action

> **Your next step.** Vision without Clarity leaves people inspired but unsure. Clarity without Action stays a plan. Action without Vision can move you fast in the wrong direction. Keep all three connected, and set the next action as soon as this one is reviewed.

Plan status

Select one current status.

☐ **Incomplete** (Vision, Clarity, or the first action isn't defined yet.)
Next step: Finish the missing section before anyone acts.

☐ **Complete** (Vision, Clarity, the first action, owner, date, measure, and target are all defined. Complete means the plan is ready to carry out. The result gets judged on the review date.)
Next step: Carry out the action and review it on the date you set.

Action Record

Copy the first action from the Action section into the first row.

Action	Owner	Due	How we'll know it worked	Verified by / date	Done
					☐
					☐
					☐

Set each due date by how serious the problem is.

Review

Review the result on the date you set, then write the next action.

Review date: _____

Fill it in online:
thermalenergynetwork.com/tools/vision-clarity-action