Inside Salesforce's V2MOM Playbook

Idea In Short

Most strategy documents fail for one reason: nobody outside the room where they were written can explain them. The fix is not a longer plan, it is a shorter, five-part one. Adopt Vision, Values, Methods, Obstacles and Measures [V2MOM], the planning model Marc Benioff wrote on an envelope before Salesforce existed and every team from the executive suite to the frontline answers the same five questions at whatever level of detail fits their role. Leaders who want less compliance and more genuine commitment should stop writing separate strategy decks for each department and instead cascade one V2MOM, one page at a time, from the top of the organization down. The framework will not rescue a bad strategy, but it will expose one quickly, because vague ambitions have nowhere to hide inside five specific questions.

Strategic plans tend to die in one of two ways. Either nobody outside the executive team understands them, or everybody understands them and nobody believes they connect to daily work. Marc Benioff built Salesforce around a five-part planning model to avoid both failures and the model has since spread well beyond one software company because the problem it solves, a workforce that complies without understanding, shows up everywhere. What follows looks at how Vision, Values, Methods, Obstacles and Measures [V2MOM] fits together, where it tends to break down in practice and what separates organizations that actually run on it from those that filled out a template once and moved on.

Why Alignment Breaks Down Without a Shared Language

Most organizations do not suffer from a shortage of strategy. They suffer from a shortage of shared understanding about what that strategy means for the person sitting three levels below the executive who wrote it. Leadership IQ's research on this gap found that only 15 percent of employees can explain the reasoning behind their company's strategic direction, leaving the remaining 85 percent to guess or simply follow orders.1 That gap matters because compliance and commitment produce different outcomes under pressure:

an employee who complies stops the moment nobody is watching, while one who understands the reasoning adapts when circumstances change

The usual response to this problem is more communication, another town hall, another slide deck restating the mission statement. That rarely works because the underlying strategy document was never built to be understood at every level in the first place, full of qualifiers and financial targets that mean little to someone running a regional sales team. A framework that forces the same five questions at every level, answered with appropriate specificity, closes that gap structurally rather than through repetition, which is the problem Vision, Values, Methods, Obstacles and Measures [V2MOM] was designed to solve.

What V2MOM Actually Stands For

V2MOM expands to Vision, Values, Methods, Obstacles and Measures and Benioff is credited with drafting the original version before Salesforce had a physical office, reportedly on the back of an envelope. That origin story matters less than what it produced: a document that has run every planning cycle at Salesforce since, scaling from a handful of founders to a global workforce without changing its basic shape.2 The five categories answer, in order, where an organization is going, what principles govern the journey, what actions will get it there, what could stop it and how anyone will know it worked.

The framework's real advantage shows up when it moves across organizational levels. A corporate V2MOM might set a vision spanning several years and a handful of company-wide priorities, while a regional sales team's V2MOM answers the identical five questions with quarterly targets and obstacles tied to that region's market. Because the structure never changes, a manager reviewing both documents can trace a straight line between a company-wide priority and the specific initiative a frontline team runs to support it.

That consistency also solves a coordination problem most large organizations face without realizing it. When finance, product and sales each build strategy documents in different formats, cross-functional coordination requires translation work before collaboration can start and a shared five-part structure removes that step.

Vision: Naming the Destination

Vision answers a single question:

> what does success actually look like, described in terms of outcome rather than activity

A strong vision statement contains no product roadmap, no headcount target and no dollar figure. It describes the change an organization intends to create in the world, stated with enough clarity that a stranger could recognize whether the organization achieved it.

President John F. Kennedy's 1961 commitment to land an American on the moon before the decade ended remains the clearest public example of this discipline. The statement contained no mention of rocket specifications or budget; it named a destination and a deadline and left the engineering to the people whose job it was to solve engineering problems.3 Amazon's early vision, to build a place where people could find and buy anything online, followed the same logic, saying nothing about warehouses or cloud computing, both of which arrived later as Methods in service of that Vision.

A vision statement fails when it tries to do the job of the Methods section instead of its own. Writing a wish list of features or initiatives into the Vision produces a document that expires the moment the roadmap changes, because the destination and the route have been fused together. Keeping Vision focused purely on outcome lets it survive years of tactical change underneath it, which is what allows a five-part plan to stay stable while the world around it shifts.

Values: The Principles That Hold Under Pressure

Values name the principles a team will not abandon even when abandoning them would be convenient. They matter least when things are going well and most in the moment an organization is tempted to cut a corner, which is why a Values section that reads like a poster in a break room, rather than a genuine constraint on behavior, provides no real guidance at all.

Johnson & Johnson's response to the 1982 Tylenol tampering crisis remains the standard reference for this distinction. When cyanide-laced capsules killed seven people in the Chicago area, the company pulled every bottle of Tylenol from every retail shelf nationwide, a decision that cost roughly 100 million dollars and briefly cost the product its market position.4 That decision followed directly from a written commitment to patient safety that predated the crisis by decades, demonstrating the point of writing Values down before a crisis arrives rather than improvising principles under pressure.

Effective Values statements come from conversation, not decree. Surveying employees and testing candidate values against real past decisions surfaces principles people already hold rather than ones a leadership team wishes they held and once set, Values should show up in how a team resolves ambiguity, not just in a document nobody rereads once the planning cycle ends.

Methods: Turning Direction Into Action

Methods translate Vision and Values into a specific list of initiatives, each with an owner and a timeframe. This is the section most likely to receive too little attention, because Vision and Values feel like the interesting, aspirational parts of the exercise, while Methods require the harder work of committing to specific, checkable actions.

A useful discipline borrows from the SMART criteria, requiring each Method to be specific, measurable, achievable, relevant and time-bound rather than a vague statement of direction. Some teams layer Objectives and Key Results on top of their Methods for additional structure, though this stays optional. What matters more than the exact format is that each Method survives a simple test:

> could someone read it in six months and say definitively whether it happened

Three practices consistently separate strong Methods sections from weak ones.

- Each Method traces back to a corporate priority rather than existing as an independent pet project

- The highest-impact items appear first, forcing genuine prioritization over a flat list of equally weighted tasks
- The ambition stays real but achievable, since a Methods section nobody believes is possible gets ignored rather than executed

Obstacles: Naming What Could Break the Plan

Obstacles set V2MOM apart from most other strategic planning formats, because most frameworks stop at defining the plan and never ask what might defeat it. This section requires a team to answer two blunt questions before execution starts:

> what would failure actually look like and what specific conditions would have to be true for that failure to happen

Naming obstacles in advance produces two concrete benefits. A team that has already identified likely resource constraints or regulatory friction can allocate people and budget around those risks instead of reacting after they materialize and the exercise sharpens focus by making clear which proposed activities are unlikely to move the needle.

This section works best when it avoids euphemism. A team that writes vague obstacles like market conditions has not actually done the exercise; a team that writes we will lose two of our three senior engineers to a competitor's retention package has given itself something concrete to plan around and that discomfort is the point rather than a side effect to minimize.

Measures: Proving the Plan Is Working

Measures answer how anyone will know whether the plan worked and a single metric is rarely enough to answer that honestly. Harvard Business Review's long-running argument for ambition-led strategy makes a related case: goals disconnected from a clear read on current reality either overshoot into wishful thinking or undershoot into incrementalism.5 V2MOM addresses that risk by asking teams to track three distinct categories of measure rather than one.

1. Lagging measures report results from work already completed, giving a historical read on performance without predicting what comes next
2. Leading measures track current activity that is believed to drive future lagging results, giving teams an early signal while there is still time to adjust
3. Counter measures watch for the negative side effects of chasing a target too aggressively, preventing a team from winning on one metric while quietly damaging another

A mobile game studio illustrates how the three fit together. Its lagging measure might be the share of players who quit before finishing their first session, its leading measure the hours spent researching what frustrates new players and its counter measure the share abandoning the game entirely rather than simply restarting, guarding against a fix that solves the stated problem while creating a worse one.

Rolling V2MOM Out Step by Step

Implementation works best when it starts at the top and cascades downward rather than launching everywhere at once. Leadership works through Vision and Values first, in dedicated sessions rather than as an agenda item squeezed into a broader meeting, because both require genuine reflection rather than a quick brainstorm. The organization then moves to Methods, breaking the Vision into discrete initiatives with named owners and timelines, ideally with input from people who understand operational constraints firsthand rather than executives alone, before turning to Obstacles and building contingency plans for the risks most likely to cause damage.

Measures come next, with an executive wanting a handful of high-level indicators showing overall trajectory while a team manager needs granular metrics revealing where execution is succeeding or stalling. The final step, review, is a recurring habit rather than a discrete task:

> a scheduled check-in asking whether Methods remain right given what has happened since, with frontline feedback given real weight

Where Cascading Plans Usually Stall

Three failure patterns account for most V2MOM implementations that never deliver on the framework's promise. The first is treating the exercise as a form to complete rather than a conversation to have, producing a document with the right headings and none of the honest thinking underneath them; the fix is blocking enough time for the discussion to happen and treating disagreement as useful signal rather than an inconvenience to smooth over.

The second failure is writing the document once and never mentioning it again. A V2MOM that lives in a shared drive and never comes up in a team meeting might as well not exist, since the framework's value comes from repeated reference, not the act of writing it. Leaders who tie decisions back to specific lines in the V2MOM keep it alive in a way a single all-hands announcement never will.

The third failure treats the plan as fixed once written, even as the market shifts underneath it. A V2MOM drafted in January can be wrong by the third quarter and organizations that never revisit Methods or Measures end up executing a plan built for conditions that no longer exist. The answer is not constant rewriting but scheduled checkpoints that test Methods and Measures against reality while Vision and Values stay fixed.

Cascading the Framework From Corner Office to Front Line

The framework earns its keep when it cascades through an entire organization rather than stopping at the executive level, with each function building its own V2MOM that connects upward to a shared plan. Consider a manufacturer's head of sustainability building a functional V2MOM inside a larger company-wide plan. Their Vision might commit the function to eliminating its environmental footprint within the industry, while their Values emphasize environmental responsibility, accountability and engagement with the communities where the company operates.

Their Methods could include cutting the manufacturing footprint's carbon output to zero by a named year and converting energy sourcing to renewable contracts by another. Their Obstacles would likely name the capital cost of the transition and regulatory approval timelines outside the team's direct control. Their Measures might track water usage per unit produced, the share of energy drawn from renewable sources and the payback period on the required technology investments.

That functional V2MOM never has to reference the company-wide document explicitly to stay aligned with it, because the same five-question structure guarantees the connection. A reviewer moving from the corporate plan to the sustainability function's plan can trace exactly how a company-wide priority translated into commitments, obstacles and metrics for one function, which is the purpose of cascading the framework in the first place.

Habits That Separate Durable V2MOMs From Wallpaper

Bain's long-running survey of management tools has tracked which frameworks companies adopt and, more tellingly, which ones they still use years later; the gap between adoption and sustained use is usually explained by execution discipline rather than the tool itself.6 The same pattern holds for V2MOM and a handful of habits explain why some organizations still run on it a decade later while others abandoned it after one cycle.

Respecting the order of the five components matters more than it seems. Vision and Values have to be settled before Methods get written, since Methods chosen without a clear destination tend to be things the team already wanted to do rather than a plan derived from strategy and skipping to Measures before Obstacles are named produces metrics that look precise but miss the real risks.

Brevity is a forcing function rather than a stylistic preference. Salesforce keeps its V2MOM documents to a single page because a longer document lets a team avoid the hard prioritization decisions a page limit makes unavoidable and plain language matters for the same reason:

> a document full of jargon cannot be recited by someone under pressure and one nobody can recite from memory will not guide a real decision made at speed

Sharing drafts widely before finalizing them catches conflicts and blind spots a document written in isolation will always miss. McKinsey's research on why some strategies consistently outperform their peers points to the same factor: strategies stress-tested with input from the people who will execute them perform materially better than those handed down without it.7 The software used to store a V2MOM matters far less than whether people can find it and reference it when a decision needs to be made.

- 1State of the Global Workplace
- 2Create strategic company alignment with a V2MOM
- 3Address at Rice University on the nation's space effort
- 4Tylenol and the legacy of J&J's James Burke
- 5Strategic intent
- 6Management tools and trends
- 7Strategy to beat the odds

Summary

V2MOM works because it refuses to let a plan stay vague. Vision states the destination, Values set the rules for getting there, Methods turn intent into assignments, Obstacles force honesty about what could go wrong and Measures settle the question of whether any of it worked. Salesforce scaled the model from a founder's envelope to a company with more than seventy thousand employees by cascading one page at a time rather than writing separate playbooks per department. The lesson for other organizations is not to copy the acronym but to copy the discipline: fewer words, harder questions and a plan that a new hire can read in under two minutes and repeat back correctly.