

# A Planning Model for Financial Wellbeing in 2018 and Beyond

**Financial Wellbeing, for our members, our colleagues, our communities, our selves – that’s why we’re here – it’s our shared mission. Each credit union, as collaborative as we are, walks the path a little differently.**

**A successful approach for your credit union** should be simple. It won’t come from the past and it won’t come from a template. Interconnected strategic/business plans, linked to clean performance and a mindful team of aligned, happy people, can be achieved without fanfare.

**STRATEGY:** Envisioning the future together and creating measurable plans yields success.

**PERFORMANCE:** Sharing a disciplined approach that focuses upon clarity and results serves all.

**MINDFULNESS:** Ensuring that personal and professional wellbeing are interconnected sustains your mission.

**An Internal Planning Director**, who is not the CEO, will lead the performance/execution process along with an inter-departmental Strategic Action Team. They will be the leaders of your interconnected strategy, performance and mindfulness. Details, focus, empathy and results!

**Getting there with Cooperative Strategies** is much more and much less than clever words, hype or fancy process. We’ve been partnering effectively in cu-land, as credit union insiders (C-level leaders) who understand people and work.



**John Parsons** is the CEO of Cooperative Strategies and has worked with hundreds of credit unions in his 35-year cu career at all levels of our system and movement from coast to coast. John is also a certified teacher of *Mindfulness-Based Emotional Intelligence Informed by Neuroscience* at the Search Inside Yourself Leadership Institute founded at Google.

## TIMELINE ON YOUR SIDE

### JANUARY – MARCH

- ✓ Getting the plan in motion.

### APRIL

- ✓ Gut check YTD performance.
- ✓ Engage the team and introduce a mindful approach.
- ✓ Name internal planning director and strategic action team.
- ✓ Start environmental scanning.

### MAY

- ✓ Assess performance approach and results of current plan.
- ✓ Refine organizational execution process.
- ✓ Begin departmental planning.

### JUNE

- ✓ Leadership offsite.
- ✓ Team meeting and celebration.

### JULY

- ✓ Planning update with the team.

### AUGUST

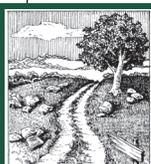
- ✓ Begin formal assessment of year to date and plan for 2019-21.
- ✓ Organization-wide strategic dialogue.

### SEPTEMBER AND OCTOBER

- ✓ Organization-wide planning and budgeting.
- ✓ Off-sites including all.

### NOVEMBER AND DECEMBER

- ✓ Development of documents for January approval upon year-end results.



**COOPERATIVE STRATEGIES**

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