

A Planning Model for Financial Wellbeing in 2019 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

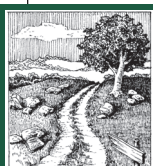
- ✓ Begin formal assessment of year to date and plan for 2019-21.
- ✓ Organization-wide strategic dialogue.

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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