

A Strategic Planning Model for Credit Unions

Sustaining a financially sound credit union, 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. Learn more from a white paper available as a downloadable PDF:

https://www.cooperative-strategies.com/CooperativeStrategies_white_paper.pdf

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. Our WellBeing@Work program can be custom tailored for your organization. Read and download a brief PDF overview from our website: https://www.cooperative-strategies.com/WellBeingAtWork_brief.pdf

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. We also offer advantages in our approach that are not available from other agencies:

Dual facilitators for Strategic Planning Conference with over 75 combined years of varied CEO experience in both credit unions and CUSOs.

Customized planning process unique to each CU’s needs, no cookie cutter templates or prescribed formats.

Extensive pre-work with volunteers & staff designed to optimize efficient use of planning conference time.

Significant post-planning conference follow-up with the management team to ensure effective execution of plans.

“John Parsons has done a phenomenal job in facilitating our Strategic Planning session. He not only helped us to identify our strategic objectives and develop a balanced scorecard for measurement, he also helped us in our teambuilding efforts. John relates well with volunteers and staff and can delve deep into the essence of what will make the credit union thrive.”

— **Robert Schroeder**, President and CEO
Prince George’s Community Credit Union

THE TEAM



John Parsons

is the founding partner of Cooperative Strategies and has worked with

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



Steven Joiner

has worked his entire career with credit union trade associations, their for-profit

subsidiaries and for a credit union subsidiary. Steven’s expertise lies in the marketing, marketing research, public relations and strategic planning arenas and he also is known for building superior staffs with high performance and morale. Well-versed in industry vendor selection and association management, he has earned the Certified League Executive designation.



Kim Nashed, a

professional yoga instructor, loving Mom and business owner will assist in all areas related

to physical and mental wellbeing. Kim is a nationally certified and 500 hour advanced-training certified teacher, leads classes that integrate the body, breath, a quiet mind, and an open heart.



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