



Vision is the Purview of Leaders

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Where Are We Going?

Strategy = Direction + Connection



Elements in Creating Your Vision

- Anticipate
- Look Back
- Interpret
- Enlist
- Align
- Act



Anticipate

- Talk with members, vendors, and other credit union professionals to understand their challenges and the future they see coming.
- Study the literature on the trends.
- Use “What If” Scenario Planning.

Look Back

- What does your history tell you?
- What experiences are noteworthy?
- How did mentors bring forth their vision?



Interpret

- Be sure to zoom in and zoom out.
- Look for missing information.
- Bring in others to play the role of devil's advocate to challenge your thinking.

Enlist

- Bring the team in early to co-create a vision.
- Show everyone how their long-term interests benefit from the vision.
- Communicate again and again.



Align

- People
- Policies
- Processes



Act

- Generate small wins to garner momentum.
- Connect actions back to the vision.
- Keep asking “What can we learn?”.

THANK YOU

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