

LEADING WITH VISION:

Empowering Teams through Purpose

Passion, drive, execution, and confidence are all crucial components of success, but without vision, they can lack direction and purpose.

Without vision:

- Our passion can become unfocused or misdirected.
- Our drive can lead us down paths that don't contribute to our broader aspirations.
- We may expend energy on tasks or projects that are ultimately wasteful.
- Even the most confident individuals will struggle to maintain high levels of energy without a clear understanding of why their efforts matter in the grand scheme of things.

In essence, vision gives meaning to our passion, channels our drive towards meaningful objectives, provides a framework for effective execution, and reinforces our confidence in the pursuit of our goals.

Use this worksheet to jumpstart crafting a vision for your credit union.

STOP: Before you start, make sure you've blocked out time in a quiet space to complete.

1. Imagine where you want to be in the next 3-5 years. As you write, be sure to write in the present tense. Visualize what success looks like and feels like in vivid detail. Focus on the "what" rather than the "how." Beware: We often unconsciously place boundaries on our aspirations based on past experiences or perceived limitations. Thinking big requires embracing a mindset of abundance and possibility.

2. Now reflect on what could hold your vision back — fear of failure, short-term thinking, ego and personal agenda, a sense of complacency, etc. Go ahead. Write down all those blinders to creating a steadfast vision, and then, one by one, tear them all down!

3. What do you need to make your vision a reality? We're still not asking "how," but rather: What kind of team do you have? What metrics are the most meaningful to them? What kind of impact does your credit union have on members?

4. When your vision is well-defined, it's easier for others to understand and support them. Take what you've written and organize your thoughts. Use clear, concise sentences and avoid unnecessary words. Remove unnecessary repetition and phrases that don't add value. What you write below is not final, but it should be clear and you should be enthusiastic about what you just wrote. If not, start over.

5. As a leader, you didn't involve anyone in crafting the first draft of your vision in the steps above. It's your vision for your credit union, or for your department, or for yourself. You own it. However, now it's time for feedback and buy-in from others. If you are the CEO, it may be input from your leadership team. If you a department head, it's time to get feedback from your team. As an individual, share your vision with your boss, a colleague or even a friend. Go into your meeting of the minds encouraging diverse opinions, critical thinking, and constructive criticism. You want honest feedback. Take their suggestions to help refine and strengthen your vision. But... don't let anyone tear down your vision.

Remember: Your vision is designed to empower you and others. Vision aligns efforts and resources toward a shared goal. This sense of purpose drives collaboration, innovation, and high-performance, leading to greater satisfaction and success for both the team and the credit union.