**FPA of Greater Phoenix**

**Working Team Actual Plan**

Vision: The Essential Hub of our Financial Planning Community.

Mission: Connect CFP® and associated professionals to the resources they need and the people who need them.

**2018 Strategic Directives**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  |  | 2017 Metric | 2017 Goal | 2017 Actual | 2018 Metric | 2018 Target |
| 1. Maintain and grow our membership |  | Total Membership Count | 425 | 345 |  |  |
|  | Attract a larger amount of CFP’s in the Greater Phoenix area | Ratio | 75% | 74% |  |  |
|  | High retention rate of current members | Retention Rate | Not specified | 77% |  |  |
| 1. Deliver impactful and sustainable professional development programs |  |  |  |  |  |  |
|  | Events to synergize relationships among members and our chapter partners | Not specified |  |  |  |  |
|  | Provide quality continuing education for members | Overall Satisfaction rating from surveys  Attendance Numbers | 4.75 | 4.6 |  |  |
| 1. Raise awareness among our government leaders, related organizations and the public |  | Not Specified, beyond planning activities in Advocacy and Public Awareness |  |  |  |  |
| 1. Support our local community through pro-bono and social activities |  | Not Specified, beyond planning activities for Pro Bono and networking activities |  |  |  |  |
| 1. Sound financial awareness to balance the efforts with our resources |  | Budget Targets for Income and Expenses | * 3000 tent | -3000 |  |  |

Working Team Annual Plan: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Working Team Aim: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(1 sentence description of how your working team’s activities directly support the vision and mission).

Working Team Members:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Planned Activity | Staff, Board or Organizational Support Needed | Frequency  /Timeline | Responsibility | Smart Goal   * **S**pecific (who/what/where/when/which/why) * **M**easurable (what metric?) * **A**chievable (baby steps) * **R**elevant (Visions/Mission/Directives) * **T**imebound (which month, quarter, or by year end) | Budget Amount Requested |
| 1 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

Goal: I want to complete a project

* **Specific:** Many people are accessing our current site from their mobile devices. Since it’s not a responsive site, it provides a poor experience for customers. I want to launch a mobile app for my company website by the end of Q2, which requires involvement from software development, design, and marketing.
* **Measurable**: Creating a mobile app for our company site will require a lot of resources. To make it worthwhile, I’d like to have 50,000 installs of the site within six months of launch. I’d also like to show a 5% conversion rate from customers using the mobile site.
* **Achievable**: The departments that will be involved have signed-off on creating a mobile app. I’ll need to manage the project and set milestones to keep everyone motivated and on target.
* **Relevant**: Improving the customer experience on mobile devices is a core initiative for my company this year.
* **Time-Bound**: In order to achieve 50,000 mobile app installs and a 5% conversion rate by the end of the fiscal year, the app will need to be launched by Q2 with a robust marketing campaign that should continue through the end of the year.

Working Team Annual Plan: Advocacy

Working Team Aim: (1 sentence description of how your working team’s activities directly support the vision and mission).

(draft) communicate important legislative and regulatory trends that may impact the financial planning profession to the FPA of Greater Phoenix board and chapter members

Working Team Members:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Planned Activity | Staff, Board or Organizational Support Needed | Frequency  /Timeline | Responsibility | Smart Goal   * **S**pecific (who/what/where/when/which/why) * **M**easurable (what metric?) * **A**chievable (baby steps) * **R**elevant (Visions/Mission/Directives) * **T**imebound (which month, quarter, or by year end) | Budget Amount Requested |
| 1 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

Goal: I want to complete a project

* **Specific:** Many people are accessing our current site from their mobile devices. Since it’s not a responsive site, it provides a poor experience for customers. I want to launch a mobile app for my company website by the end of Q2, which requires involvement from software development, design, and marketing.
* **Measurable**: Creating a mobile app for our company site will require a lot of resources. To make it worthwhile, I’d like to have 50,000 installs of the site within six months of launch. I’d also like to show a 5% conversion rate from customers using the mobile site.
* **Achievable**: The departments that will be involved have signed-off on creating a mobile app. I’ll need to manage the project and set milestones to keep everyone motivated and on target.
* **Relevant**: Improving the customer experience on mobile devices is a core initiative for my company this year.
* **Time-Bound**: In order to achieve 50,000 mobile app installs and a 5% conversion rate by the end of the fiscal year, the app will need to be launched by Q2 with a robust marketing campaign that should continue through the end of the year.

Working Team Annual Plan: Communications

Working Team Aim: (1 sentence description of how your working team’s activities directly support the vision and mission).

Create and provide sufficient infrastructure, messaging and tools to effectively connect our stakeholders to each other and the chapter activities they most need and value.

Working Team Members:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Planned Activity | Staff, Board or Organizational Support Needed | Frequency  /Timeline | Responsibility | Smart Goal   * **S**pecific (who/what/where/when/which/why) * **M**easurable (what metric?) * **A**chievable (baby steps) * **R**elevant (Visions/Mission/Directives) * **T**imebound (which month, quarter, or by year end) | Budget Amount Requested |
| 1 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

Goal: I want to complete a project

* **Specific:** Many people are accessing our current site from their mobile devices. Since it’s not a responsive site, it provides a poor experience for customers. I want to launch a mobile app for my company website by the end of Q2, which requires involvement from software development, design, and marketing.
* **Measurable**: Creating a mobile app for our company site will require a lot of resources. To make it worthwhile, I’d like to have 50,000 installs of the site within six months of launch. I’d also like to show a 5% conversion rate from customers using the mobile site.
* **Achievable**: The departments that will be involved have signed-off on creating a mobile app. I’ll need to manage the project and set milestones to keep everyone motivated and on target.
* **Relevant**: Improving the customer experience on mobile devices is a core initiative for my company this year.
* **Time-Bound**: In order to achieve 50,000 mobile app installs and a 5% conversion rate by the end of the fiscal year, the app will need to be launched by Q2 with a robust marketing campaign that should continue through the end of the year.

Working Team Annual Plan: Membership

Working Team Aim: (1 sentence description of how your working team’s activities directly support the vision and mission).

Understand what our members and potential members most want and value from their FPA chapter.

Working Team Members:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Planned Activity | Staff, Board or Organizational Support Needed | Frequency  /Timeline | Responsibility | Smart Goal   * **S**pecific (who/what/where/when/which/why) * **M**easurable (what metric?) * **A**chievable (baby steps) * **R**elevant (Visions/Mission/Directives) * **T**imebound (which month, quarter, or by year end) | Budget Amount Requested |
| 1 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

Goal: I want to complete a project

* **Specific:** Many people are accessing our current site from their mobile devices. Since it’s not a responsive site, it provides a poor experience for customers. I want to launch a mobile app for my company website by the end of Q2, which requires involvement from software development, design, and marketing.
* **Measurable**: Creating a mobile app for our company site will require a lot of resources. To make it worthwhile, I’d like to have 50,000 installs of the site within six months of launch. I’d also like to show a 5% conversion rate from customers using the mobile site.
* **Achievable**: The departments that will be involved have signed-off on creating a mobile app. I’ll need to manage the project and set milestones to keep everyone motivated and on target.
* **Relevant**: Improving the customer experience on mobile devices is a core initiative for my company this year.
* **Time-Bound**: In order to achieve 50,000 mobile app installs and a 5% conversion rate by the end of the fiscal year, the app will need to be launched by Q2 with a robust marketing campaign that should continue through the end of the year.

Working Team Annual Plan: Partnership

Working Team Aim: (1 sentence description of how your working team’s activities directly support the vision and mission).

Connect chapter professionals to mutually beneficial vendors and services in ways that fund chapter programs while providing authentic relationship building opportunities.

Working Team Members:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Planned Activity | Staff, Board or Organizational Support Needed | Frequency  /Timeline | Responsibility | Smart Goal   * **S**pecific (who/what/where/when/which/why) * **M**easurable (what metric?) * **A**chievable (baby steps) * **R**elevant (Visions/Mission/Directives) * **T**imebound (which month, quarter, or by year end) | Budget Amount Requested |
| 1 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

Goal: I want to complete a project

* **Specific:** Many people are accessing our current site from their mobile devices. Since it’s not a responsive site, it provides a poor experience for customers. I want to launch a mobile app for my company website by the end of Q2, which requires involvement from software development, design, and marketing.
* **Measurable**: Creating a mobile app for our company site will require a lot of resources. To make it worthwhile, I’d like to have 50,000 installs of the site within six months of launch. I’d also like to show a 5% conversion rate from customers using the mobile site.
* **Achievable**: The departments that will be involved have signed-off on creating a mobile app. I’ll need to manage the project and set milestones to keep everyone motivated and on target.
* **Relevant**: Improving the customer experience on mobile devices is a core initiative for my company this year.
* **Time-Bound**: In order to achieve 50,000 mobile app installs and a 5% conversion rate by the end of the fiscal year, the app will need to be launched by Q2 with a robust marketing campaign that should continue through the end of the year.

Working Team Annual Plan: Lifelong Learning

Working Team Aim: (1 sentence description of how your working team’s activities directly support the vision and mission).

Provide programming relevant to CFP(R) professionals and our allied professionals, including opportunities to support Professional Development, Business Success, Community, and Advocacy efforts.

Working Team Members:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Planned Activity | Staff, Board or Organizational Support Needed | Frequency  /Timeline | Responsibility | Smart Goal   * **S**pecific (who/what/where/when/which/why) * **M**easurable (what metric?) * **A**chievable (baby steps) * **R**elevant (Visions/Mission/Directives) * **T**imebound (which month, quarter, or by year end) | Budget Amount Requested |
| 1 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

Goal: I want to complete a project

* **Specific:** Many people are accessing our current site from their mobile devices. Since it’s not a responsive site, it provides a poor experience for customers. I want to launch a mobile app for my company website by the end of Q2, which requires involvement from software development, design, and marketing.
* **Measurable**: Creating a mobile app for our company site will require a lot of resources. To make it worthwhile, I’d like to have 50,000 installs of the site within six months of launch. I’d also like to show a 5% conversion rate from customers using the mobile site.
* **Achievable**: The departments that will be involved have signed-off on creating a mobile app. I’ll need to manage the project and set milestones to keep everyone motivated and on target.
* **Relevant**: Improving the customer experience on mobile devices is a core initiative for my company this year.
* **Time-Bound**: In order to achieve 50,000 mobile app installs and a 5% conversion rate by the end of the fiscal year, the app will need to be launched by Q2 with a robust marketing campaign that should continue through the end of the year.

Working Team Annual Plan: Public Awareness

Working Team Aim: (1 sentence description of how your working team’s activities directly support the vision and mission).

Develop general public awareness of financial planning as a pillar critical to achieving a fulfilling life and promote the discipline of financial planning as an advanced profession and influential career path.

Working Team Members:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Planned Activity | Staff, Board or Organizational Support Needed | Frequency  /Timeline | Responsibility | Smart Goal   * **S**pecific (who/what/where/when/which/why) * **M**easurable (what metric?) * **A**chievable (baby steps) * **R**elevant (Visions/Mission/Directives) * **T**imebound (which month, quarter, or by year end) | Budget Amount Requested |
| 1 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

Goal: I want to complete a project

* **Specific:** Many people are accessing our current site from their mobile devices. Since it’s not a responsive site, it provides a poor experience for customers. I want to launch a mobile app for my company website by the end of Q2, which requires involvement from software development, design, and marketing.
* **Measurable**: Creating a mobile app for our company site will require a lot of resources. To make it worthwhile, I’d like to have 50,000 installs of the site within six months of launch. I’d also like to show a 5% conversion rate from customers using the mobile site.
* **Achievable**: The departments that will be involved have signed-off on creating a mobile app. I’ll need to manage the project and set milestones to keep everyone motivated and on target.
* **Relevant**: Improving the customer experience on mobile devices is a core initiative for my company this year.
* **Time-Bound**: In order to achieve 50,000 mobile app installs and a 5% conversion rate by the end of the fiscal year, the app will need to be launched by Q2 with a robust marketing campaign that should continue through the end of the year.

Working Team Annual Plan: Pro Bono

Working Team Aim: (1 sentence description of how your working team’s activities directly support the vision and mission).

Extend financial planning assistance to the underserved in financial distress and instill sound financial literacy skills in our youth

Working Team Members:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Planned Activity | Staff, Board or Organizational Support Needed | Frequency  /Timeline | Responsibility | Smart Goal   * **S**pecific (who/what/where/when/which/why) * **M**easurable (what metric?) * **A**chievable (baby steps) * **R**elevant (Visions/Mission/Directives) * **T**imebound (which month, quarter, or by year end) | Budget Amount Requested |
| 1 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

Goal: I want to complete a project

* **Specific:** Many people are accessing our current site from their mobile devices. Since it’s not a responsive site, it provides a poor experience for customers. I want to launch a mobile app for my company website by the end of Q2, which requires involvement from software development, design, and marketing.
* **Measurable**: Creating a mobile app for our company site will require a lot of resources. To make it worthwhile, I’d like to have 50,000 installs of the site within six months of launch. I’d also like to show a 5% conversion rate from customers using the mobile site.
* **Achievable**: The departments that will be involved have signed-off on creating a mobile app. I’ll need to manage the project and set milestones to keep everyone motivated and on target.
* **Relevant**: Improving the customer experience on mobile devices is a core initiative for my company this year.
* **Time-Bound**: In order to achieve 50,000 mobile app installs and a 5% conversion rate by the end of the fiscal year, the app will need to be launched by Q2 with a robust marketing campaign that should continue through the end of the year.

Working Team Annual Plan: NexGen

Working Team Aim: (1 sentence description of how your working team’s activities directly support the vision and mission).

Foster a strong community of the next generation of financial planners.

Working Team Members:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Planned Activity | Staff, Board or Organizational Support Needed | Frequency  /Timeline | Responsibility | Smart Goal   * **S**pecific (who/what/where/when/which/why) * **M**easurable (what metric?) * **A**chievable (baby steps) * **R**elevant (Visions/Mission/Directives) * **T**imebound (which month, quarter, or by year end) | Budget Amount Requested |
| 1 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

Goal: I want to complete a project

* **Specific:** Many people are accessing our current site from their mobile devices. Since it’s not a responsive site, it provides a poor experience for customers. I want to launch a mobile app for my company website by the end of Q2, which requires involvement from software development, design, and marketing.
* **Measurable**: Creating a mobile app for our company site will require a lot of resources. To make it worthwhile, I’d like to have 50,000 installs of the site within six months of launch. I’d also like to show a 5% conversion rate from customers using the mobile site.
* **Achievable**: The departments that will be involved have signed-off on creating a mobile app. I’ll need to manage the project and set milestones to keep everyone motivated and on target.
* **Relevant**: Improving the customer experience on mobile devices is a core initiative for my company this year.
* **Time-Bound**: In order to achieve 50,000 mobile app installs and a 5% conversion rate by the end of the fiscal year, the app will need to be launched by Q2 with a robust marketing campaign that should continue through the end of the year.