**EXECUTIVE SUMMARY**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Chapter Vision** |  | The Essential Hub of our Financial Planning Community | | | | | | | |
| **Chapter Mission** |  | Connect CFP® and associated professionals  to the resources they need and the people who need them | | | | | | | |
| **Chapter**  **Brand Promise** |  | Discerningly provide the essential resources for fulfilling the ambitions of your Financial Planning journey | | | | | | | |
| **Chapter Goals**  **2018** |  | Membership:  CFP® Members:  Penetration:  Retention | Events and Learning:  Registrations:  Satisfaction: | | | Legislators Reached:  Public Awareness Count:  Pro Bono Count: | | | Financial Stewardship  Partnership Dollars:  Event Funds:  Membership Funds: |
| **Team Strategies**  **[$0]** |  | **XXX**  **[$0]** | |  | **XXX**  **[$0]** | |  | **XXX**  **[$0]** | |
| **Team Tactics/**  **Activities**  [financial & human resources, timing, primary responsibility] |  |  | |  |  | |  |  | |
| **Team Members** |  | Leader: Murray Smith  Members: | | | | | | | |

FPA of Greater Phoenix

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.

**2019 General Circle Working Plan Template**

Which Working Team Annual Plan?

Your Working Team Aim:

(1 sentence description of how your working team’s activities directly support the vision and mission – see Website to copy/paste).

List Active Working Team Members:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Planned Activity | Staff, Board or Organizational Support Needed | Frequency  /Timeline/  Completion Date | Who Has Main  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 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| 6 |  |  |  |  |  |  |
|  |  |  |  |  |  |  |

SMART Goals: An Example

* **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.

\* In 2019, how will your Working Team assist in supplying the revenue required to fund this activity? Be prepared to offer ideas, suggestions, or direct links to potential revenue offsets for funding this activity.