



STRATEGIC PLANNING

Steer your entire organization in the same direction to arrive at the right destination

Experience Matters

Your business strategy is requisite to your fiscal health, vitality and sustainability. Defining, developing and executing an effective strategic plan requires finesse and know-how to better-position your organization now and in the future. Our advisors' deep knowledge of strategy and deliberation are invaluable to fleshing out ideas, identifying gaps and reaching consensus among leadership. We help you understand and parlay the concept of strategic thinking into designing a customized operational plan that aligns with your mission and vision, one that identifies short-term priorities and long-term strategies.

What Sets Our Strategic Advisors Apart?

Our advisors facilitate open and participatory discussions to encourage collaboration and to deliver on the credit union core mission of helping members achieve and sustain financial health. We facilitate strategic planning sessions where organizations

gain valuable insights on current market trends, industry practices and relevant industry data. We customize a plan true to the organization's values, one that engages its leadership team in strategic conversations.

Helping You Successfully Execute Strategy

It's one thing to formulate a strategic plan, but to effectively execute one can be challenging — It requires process, accountability and follow up. In fact, according to a recent CEO study, more than 60 percent of strategies are not being successfully implemented. Our advisors collaborate with each client to create a realistic, flexible plan that assigns action items to those best suited to accomplish them, one that promotes accountability. We help set clear priorities and collect and analyze data to identify the logical, connected activities needed for successful strategy execution.

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Increasing synergy through open communication and collaboration

Effective strategic planning is not a one-size-fits-all exercise. It's success is predicated on a customized approach, open communication and executive buy-in, and is sustained by regular follow up and goal tracking. As practiced facilitators, we motivate others to reach across the aisle and arrive at a consensus; to interact and connect with each other to create a synergy of purpose. Our unbiased moderating ensures everyone's voice is heard and that individual goals are in sync with the organizational strategic mission.

Our sound understanding of the industry helps to navigate challenges and guide future initiatives

We forge long-lasting partnerships through our authentic business practices and high standards of excellence. Our overarching goal is to help you achieve business stability, cultivate corporate culture, enhance the member experience and maximize potential for financial growth. We accomplish this by first intimately learning about your dynamic culture and grasping an understanding of your unique challenges. In the spirit of collaboration and cooperation, we partner with you to formulate a customized strategic plan true to your organization's values, one that engages your leadership team in strategic conversations. Together we determine what direction to pursue, what objectives to set and what tactics are needed to execute a forward-thinking strategic plan that guides future initiatives.



Let's have a conversation! Our Strategic Advisors will help your management team and board of directors formulate and execute a successful strategic plan. Let us work with you to identify growth strategies for achieving financial stability and organizational health. Call us at 800.262.6285 or email StrategicAdvisors@CUSolutionsGroup.com.

Strategic Planning Facilitation Key Features:

- Aligns your vision with mission, core values and goals
- Defines specific, measurable, attainable, realistic and time-based objectives
- Provides insights on current market trends, industry practices and industry data
- Defines strengths that differentiate you from the competition
- Identifies weaknesses or vulnerabilities and sets specific goals and objectives to resolve them
- Ensures a collaborative approach through facilitating an open, participatory planning process
- Anticipates and examines risk landscape and identifies threats and opportunities
- Explores and analyzes the future of leadership, technology and infrastructure
- Defines KPIs to gauge progress
- Commits to follow up, encourages accountability and reevaluates process post-facilitation
- Strategizes to enhance the member experience

Strategic Planning Facilitation Benefits:

- Facilitated by industry-specific experts, objective moderators
- Customizable
- Versatile
- Industry benchmarks and your organization's KPIs
- Greater potential for successful strategy execution