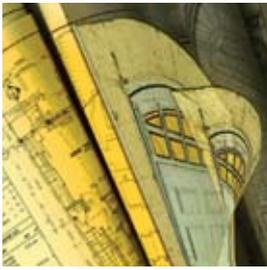




CU Planner™

A Strategic Planning Process

A Blueprint for Viable Strategy



What Does The Future Hold For Your Credit Union?

Don't pay lip service to strategic planning—make the process fully functional for your credit union!

Are your credit unions strategic planning efforts truly effective? Short workshops with a planning “coach” can present important concepts in confusing, abstract “management-speak.” Now more than ever, your credit union needs a strong plan in place—you cannot afford to be without a blueprint for long-term success.

To ensure the future relevance of your credit union the process needs measurable goals and a realistic implementation plan—**it should not be a quick fix.** If you are serious about strategic planning, take a **revolutionary and proactive approach with CU Planner: A Strategic Planning Process**, offered by the Credit Union Executives Society in partnership with strategic planning expert John Oliver.

The CU Planner process was developed by adapting the methods of **high-performing Fortune 500 companies** and tailoring it to meet the needs of the credit union movement. Discover what it can do for your credit union, now and in the future.

Strong leaders demand effective planning!



About John Oliver

John Oliver, president, Laurel Management Systems, Inc., has more than 30 years experience in the financial services industry and has worked with organizations throughout the U.S. and Europe. Educated in his native England, Oliver has dedicated his career to teaching financial services leaders imperative skills in strategic planning and strategic management. He is the lead faculty for CUES' Center for Applied Executive Management, a premier program for strategic leadership development. The author of numerous articles on financial services, Oliver has garnered tremendous respect in the credit union community.

Preparation is Key



CU Planner is a six-month process that prepares your credit union for years of success. This revolutionary approach starts with your employees, using a highly successful “bottom-up” methodology. At the beginning of the process, you will put together a strategic planning team made up of **representatives from each functional area of your credit union**. You will then assign a project manager who will oversee the entire process.

The foundation of the CU Planner method is an **information gathering period** for the first three months of the six-month process. Using templates provided by Oliver, you will take a hard look at:

- The demographics of your membership
- Your members opinions of and ideas for your credit union
- The economy’s impact on your organization
- Competitors within and outside of the movement
- Your employees’ perspective of your credit union

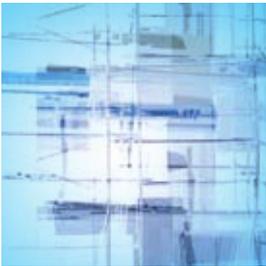
In addition, Oliver will meet with your entire staff to explain CU Planner and emphasize the value of their input in the process. By including employees from the start, you will **earn buy-in and commitment** from those who will be executing the plan.

Strategic planning with CU Planner is more than an annual event—it is an ongoing process.



Ongoing Support

Such an important undertaking requires strong support. Oliver will be available to guide you through the entire process. He will also be on site twice: to launch the preparation stage and to lead the culminating strategic planning process.

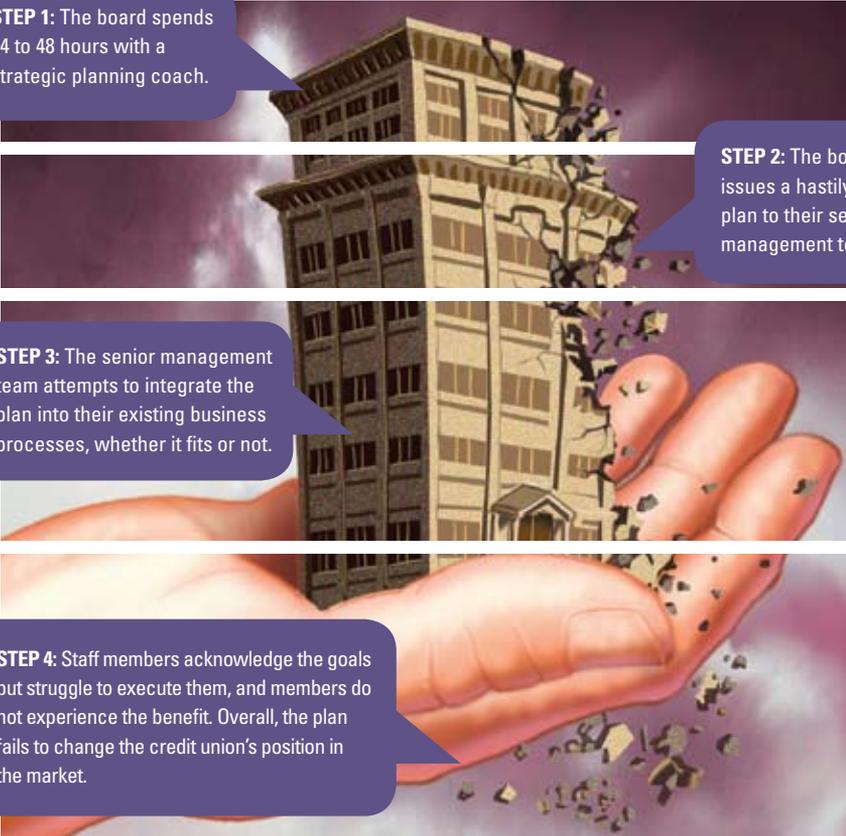


The Benefits of

Most strategic planning processes begin at the top with the board of directors and the president/CEO. The process then trickles down to each area of your credit union. Top-down strategic planning dilutes the strength of your final plan and puts your members' needs out of the loop. In his extensive research, Oliver has found that **the most successful companies in the world use the bottom-up approach** to strategic planning. This approach starts with member needs analysis and results in achievable, market-driven objectives.

Top-Down Strategic Planning

Most strategic planning starts with the board and trickles down to the rest of the credit union, weakening the message and focus at each level. Top-down planning NEVER results in strategic objectives that are truly market-driven:



STEP 1: The board spends 24 to 48 hours with a strategic planning coach.

STEP 2: The board issues a hastily built plan to their senior management team.

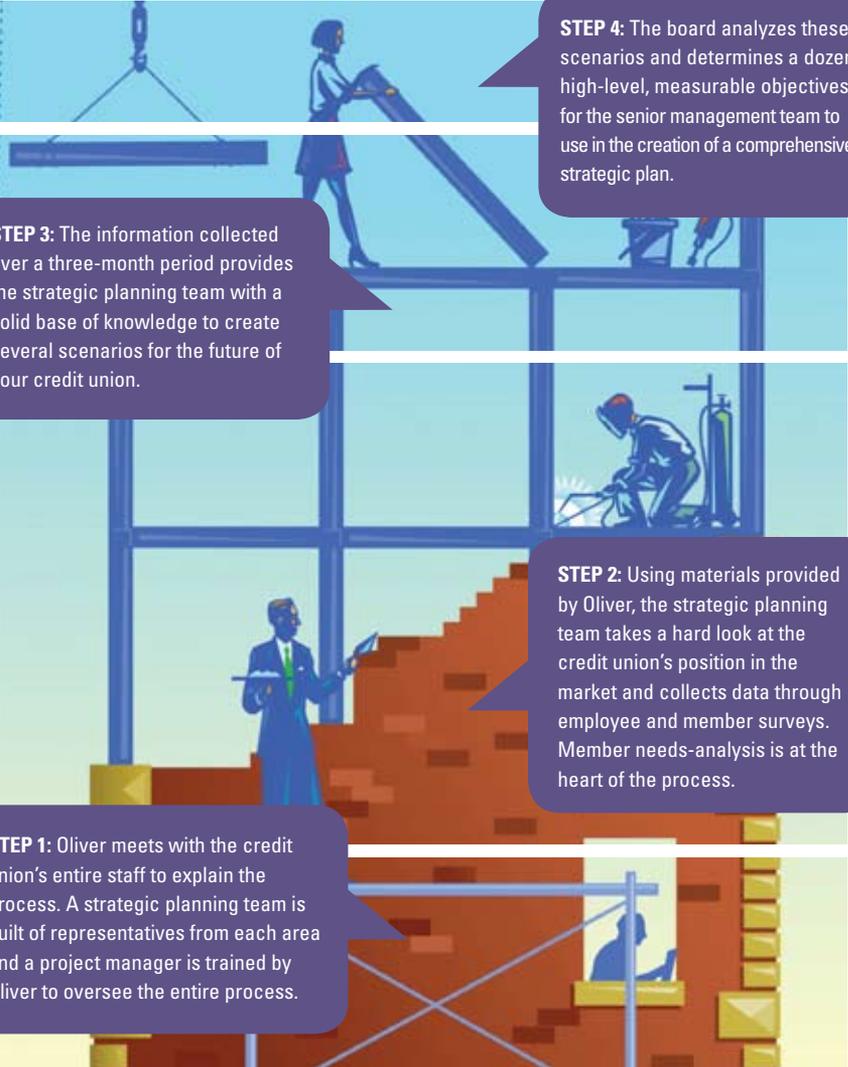
STEP 3: The senior management team attempts to integrate the plan into their existing business processes, whether it fits or not.

STEP 4: Staff members acknowledge the goals but struggle to execute them, and members do not experience the benefit. Overall, the plan fails to change the credit union's position in the market.

Bottom-Up Planning

Bottom-Up Strategic Planning

CU Planner's bottom-up approach begins with input from every area of the credit union. The board uses this information to create a more informed strategic plan:



STEP 3: The information collected over a three-month period provides the strategic planning team with a solid base of knowledge to create several scenarios for the future of your credit union.

STEP 4: The board analyzes these scenarios and determines a dozen high-level, measurable objectives for the senior management team to use in the creation of a comprehensive strategic plan.

STEP 2: Using materials provided by Oliver, the strategic planning team takes a hard look at the credit union's position in the market and collects data through employee and member surveys. Member needs-analysis is at the heart of the process.

STEP 1: Oliver meets with the credit union's entire staff to explain the process. A strategic planning team is built of representatives from each area and a project manager is trained by Oliver to oversee the entire process.

Practical Steps Toward Solid Strategy

Once you have gathered all of the necessary information, your strategic planning team will split into subgroups to develop several alternative scenarios for the future of your credit union and identify the resources required for each scenario.

Then, during an intensive full-day session, your board of directors will analyze these scenarios, and from them, pull a dozen high-level objectives for your senior management team to build into a **comprehensive, well-informed strategic plan**.

These objectives won't be simply conceptual ideas or opinions; instead they will be **solid goals that will improve your business processes** with an eye to the future. You will aim for measurable objectives that will **show you the concrete results** of your strategic plan, not abstract conclusions.



Do more than produce a document—improve your business practices and secure your sustainability.



Build the Best Strategic Plan Possible

Compared to the expense of annual retreats that result in simplified plans and the loss of profit due to poor strategic planning, the investment in CU Planner is minimal for a long-term, highly effective process that can be used year after year.

Contact us today to learn how CU Planner can revolutionize your strategic planning process and set up your credit union for success. Visit cues.org/cuplanner/ to fill out an online request form for additional information. Call **800.252.2664** or **271.2664, ext. 5332**; or e-mail sales@cues.org.







The Credit Union Executives Society
is a Madison, Wisconsin-based
independent membership association
for credit union executives worldwide.
Its mission is to educate and develop
credit union CEOs, directors and
future leaders.

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