

One Percent Strategies™ - Board of Directors and Executive Team

A planning system tailored for every credit union, One Percent Strategies™ is affordable, practical, and effective. Customized to your strategic agenda, it focuses on strategic thinking, allowing you to dream, design, and determine what lies ahead. It's a roll-up-your-sleeves system that you can implement right away. It bypasses the menaces of strategic planning (groupthink, status quo, "us, too") in order to create fresh, distinct, and top quality value for your members. Here's how:

The Focus

- Long-term vision; parameters for growth; definitions of success.
- Members, markets, and initiatives with the greatest potential.
- Product leadership, operational excellence, and member loyalty.
- Exploration and focus on Board-designed strategic inquiries.
- Relevance of products, services, and delivery for all members.
- Sound governance and guidance for executive implementation.

The Framework

- One to two days with the Board of Directors and Executive Team.
- Discussion of current trends and strategic issues for credit unions.
- Board feedback and validation on proposed strategies and plans.
- Refined, pointed, and precise Board guidance on strategic matters.
- Extensive, insightful dialogue to steer direction for several years.
- Shared understanding and support for strategic course and plans.

The Results

- Strategic statements, principal objectives, and scorecard measures.
- Areas of focus; blueprints for success; strategic progress timelines.
- Goals for growth - top line, bottom line, member value line.
- Strategic insights from Board to support tactical implementation.
- Future-focused ideas to guide next level phases of development.
- Comprehensive summary, updates, and quarterly follow through.

In the end, your Board and Executive Team become better strategists – together. They develop a strategic framework that captures the relationships in your purpose, plans, and tactics, allowing your credit union to fulfill its pledge to members and realize its potential as a marketplace leader.

One Percent Strategies™ - Executive Team

Strategic plans, tactics, and scorecard measures are often carried out by an Executive Team and its structured models for implementation. Your executives, at a range of professional levels, are deeply involved with the specific, strategic issues in sight. Their insights, operations experience, and access to data allow them to direct your Board's vision into attainable plans, goals, and results that your Board reviews, approves, and oversees in a well-balanced system of governance and execution.

The Focus

- Internal, external, connected, and industry influences and trends.
- Increasing membership, core revenue, profits, and market share.
- Advantages that allow for success and a competitive presence.
- Innovation in technology, delivery, service, and business model.
- Differentiation, entrepreneurial culture, and value of membership.
- Unique systems and standards to drive growth in core markets.

The Framework

- Up to two days with Executive Team and select colleagues.
- Systematic debate and thorough evaluation of probable strategies.
- Exhaustive analysis of options; establish key areas for plan focus.
- Create empirical approaches for competitive contrast and value.
- Build out complete business plan and methods for execution.
- Design financial, operating, and cultural measures of excellence.

The Results

- Detailed, long-term plans, goals, key measures, and timelines.
- Near-term actions, investments, and operating requirements.
- Consistent systems for sales, service, and experience excellence.
- Support and buy-in at branch, support, and administrative levels.
- Individual and team accountability expectations and evaluations.
- Capstone presentation for Board review, guidance, and support.

This level of precision helps your strategic plan become exceptionally refined and distinct. Your Executive Team follows a clear-cut design; your Board fully supports the credit union's direction; and, both leadership parties co-create and gain from a partnership in your credit union's future.