

Strategic Planning Session Overview



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What's Included:

Your strategic planning session isn't just a meeting—it's a customized consulting engagement designed to deliver clarity, engagement, and actionable direction for your credit union.

Each session includes:

- Pre-Planning Consultation: 2 - 4 calls with leadership to tailor the experience
- Session Facilitation: On-site facilitation with proven tools and techniques
- Board & Committee Education: Key reminders on governance roles and responsibilities
- Custom Strategy Tools: Visual handouts, key ratio analysis, and economic insight
- Post-Session Deliverables:
 - Comprehensive Planning Report
 - Executive Summary
 - SMART Strategic Goals
 - • Optional Add-Ons: Board presentations, follow-up coaching, or goal tracking check-ins

Why It Matters:

Credit unions are navigating rising expectations, workforce shifts, and growing member needs. My approach ensures your team walks away aligned and ready to move forward—with a plan that's achievable, focused, and member-centered.

