

A complex, multi-level wireframe architectural structure is rendered in a light grey color. It consists of various rectangular and hexagonal frames stacked and connected in a way that suggests a modern building or a series of interconnected platforms. The structure is set against a background of blue and white light trails that create a sense of motion and depth. A dark red vertical line runs down the left side of the page, and a dark red horizontal line runs across the middle, intersecting the text.

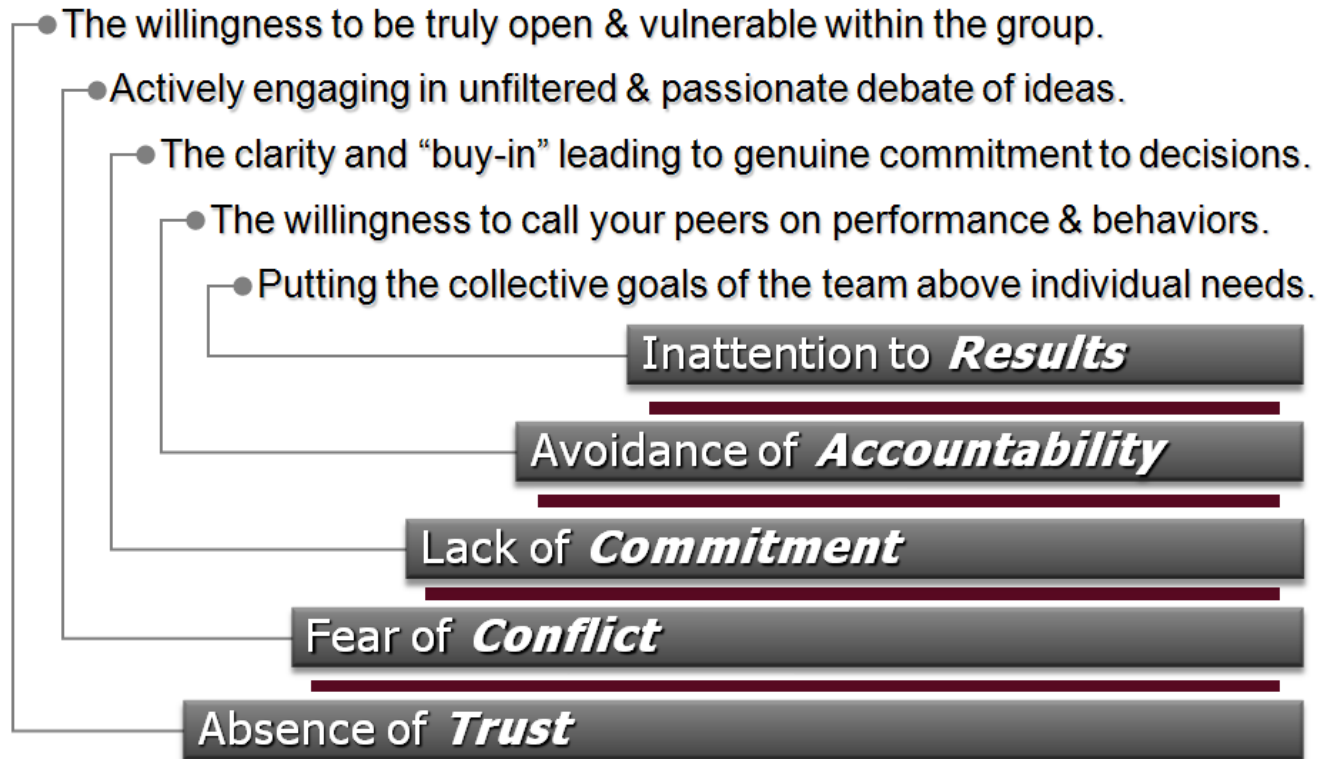
PLANNING

RESOURCES

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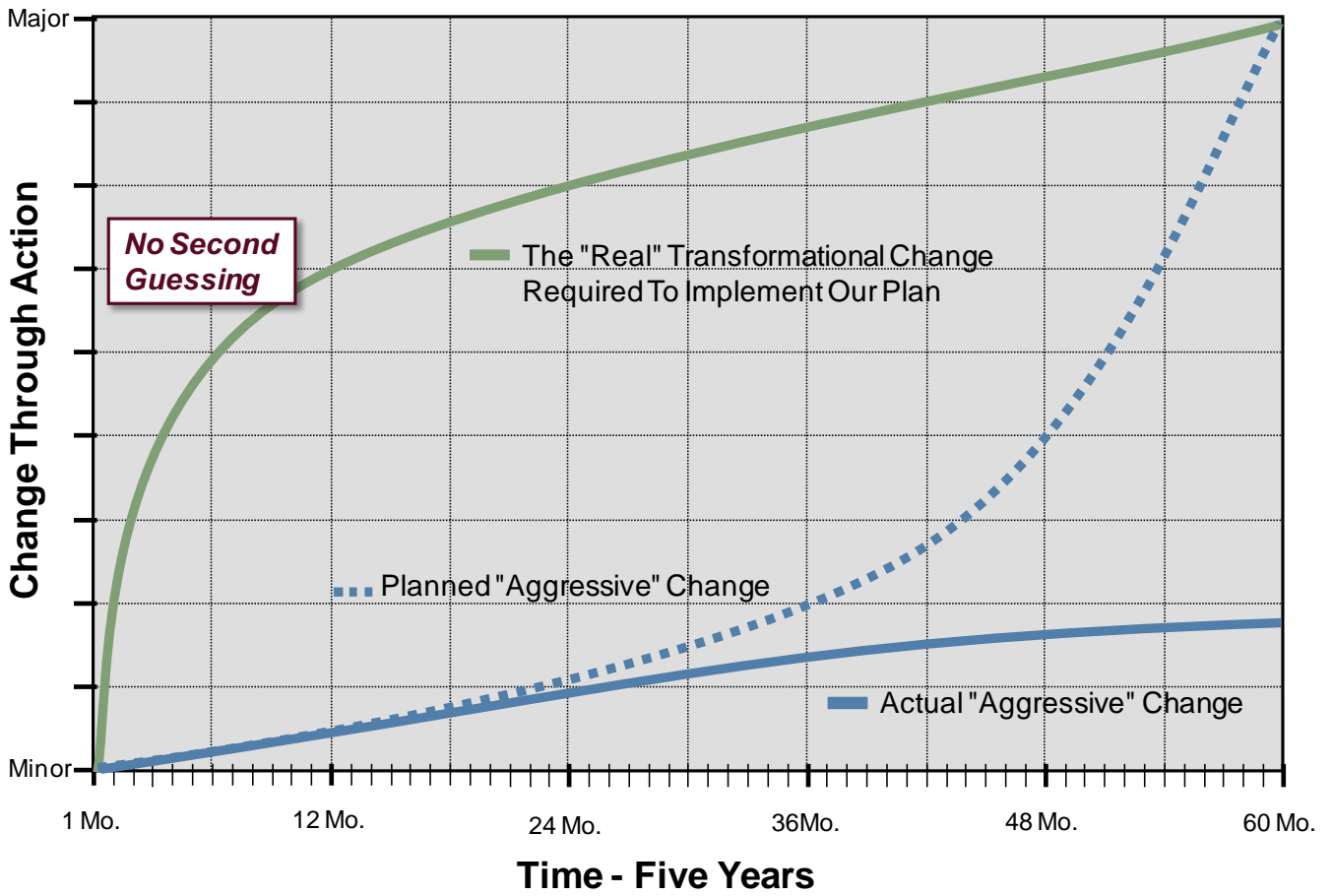
The Dysfunctions/Functions of a Team



Patrick Lencioni

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Planned vs. Actual Change



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Be Sure To Keep It Positive

“Keep your Beliefs Positive Because...

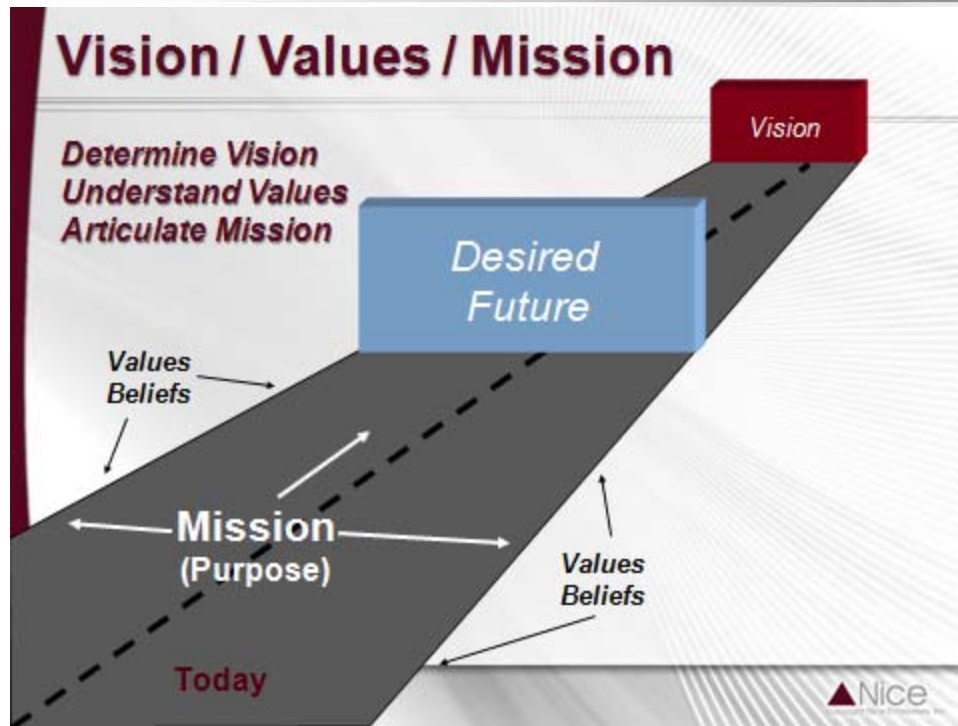
- 1 Your Beliefs Become Your Thoughts,
- 2 Your Thoughts Become Your Words,
- 3 Your Words Become Your Actions,
- 4 Your Actions Become Your Habits,
- 5 Your Habits Become Your Values,
- 6 Your Values Become Your Destiny.”

Mahatma Gandhi



The Planning Building Blocks





Developing Your Organization's Values

Values designate the organization's beliefs or principles that undergird all direction and decisions. Values can be written as words or phrases.

❖ Organizational Values = Core Values = Core Beliefs = ...

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-

❖ Develop a List of Organizational Values or Beliefs For Our CU

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❖ Discuss and Document the Implications of Our Organizational Values

-
-
-

Organization's Long Term Vision

Vision is the organization's long range (ultimate) desired result, written as a single statement. It represents the ultimate goal or destination of the organization.

A True Vision Is...

Inspiring

- *We're Excited About It*

Ours

- *It's Unique to Us*

Caught Not Taught

- *If It's Our Vision, We Know It*

Measurable

- *We Can Know When We Reach It*

VISION ANALOGY:

VISION DESTINATION:

VISION "ESSENCE"

VISION INSPIRATION

Organization's Strategic Drivers

Determine the organization's strategic drivers.

PURPOSE



An important step in your planning process is to fully understand the “strategy” the organization is pursuing. If we can understand the strategy the organization is pursuing today, we can better determine the successful competitive strategy for tomorrow. If we can fully grasp tomorrow’s desired strategy, then we can better assist you in making more informed decisions and plans. This “Strategic Drivers Survey” is one tool which will help us to obtain a greater understanding of your strategy.

OVERVIEW

Working with the financial services industry for over two decades, Nice Enterprises, Inc. has identified what we believe to be five universal elements that apply to every commercial transaction. They are: product, price, convenience / access, service / experience, and inform / communicate / educate / market. Research indicates that the most successful companies dominate in only one of these five areas, are differentiated from their competitors in one other area and are on par (or equal to) with their competition in the other areas. The *Myth of Excellence* is that most businesses believe that they must outshine their competitors in all five areas. Most companies spend far too much and allocate too many resources trying to compete on every playing field, instead of focusing those limited resources where they will really make a difference in the hearts and minds of the membership.



Great organizations have a clear understanding of how their members view their performance in each of these areas. From this information, the organization’s leadership can then determine if, and where, they dominate their competition, what members see as the primary differentiation from competitors, and whether or not they are truly on par or exceed their competition.

The economic and competitive realities of tomorrow’s market place require businesses to make intelligent trade-offs of one kind or another. The key is to have a crystal clear picture of what attribute your organization chooses to dominate and where you want to differentiate your business. Once this direction is in place, your organization will be better able to focus on what will truly impact your membership, and therefore your future success.

Truly member driven institutions don’t attempt to dominate in every member-centric category – product, price, convenience, service, or information. Great credit unions learn to overcome the constant temptation to strive for universal excellence. They identify their vision, identify their dominant and differentiating attributes which establishes the operating strategy, and establishes and monitors systems by which these areas can grow and excel. This is done while maintaining a close watch on the remaining attributes so that they never fall below industry standards (par).

Strategic Drivers Exercise

Your Title: _____

At the top of this page, fill in your title and check the box of the appropriate group you are associated with. If your group is not listed, then select "other."

- | | |
|--------------------------|--------------------------|
| <input type="checkbox"/> | Board / Elected Official |
| <input type="checkbox"/> | CEO / Senior Management |
| <input type="checkbox"/> | Manager / Supervisor |
| <input type="checkbox"/> | Staff / Other |

- We recommend that you briefly scan the entire survey before designating in your choices.
- Using the **current** level scale (1 to 4), rate each of the five areas against the general competition with where you judge your credit union currently stands. Choose only one level in each column, by attribute.
- Using the **desired** level scale (1 to 4), rate each of the five areas against the general competition with where you desire your credit union to be. Choose only one level in each column, by attribute. You may only use **one** level 4 rating and **one** level 3 rating in the desired category.
- When finished, return these last two pages to your credit union survey coordinator on or before the survey due date listed on page one. Please do not put your name on this survey. Thank You!

PRODUCT

The range, depth, utility, reliability, quality, and design of the product or service offered.

- | | |
|--------------------------------|---------------------------------------|
| ▪ <i>Credible Offerings</i> | ▪ <i>Dependable Quality</i> |
| ▪ <i>Selection of Products</i> | ▪ <i>Inspired / Unique Assortment</i> |

	CURRENT	DESIRED
Somewhat Below Competition (<i>Bogey</i>) =	Level 1 ○	Level 1 ○
Equal to Range of Competition (<i>Par</i>) =	Level 2 ○	Level 2 ○
Better Than The Competition (<i>Birdie</i>) =	Level 3 ○	Level 3 ○
Unsurpassed / The Very Best (<i>Eagle</i>) =	Level 4 ○	Level 4 ○

PRICE

The complex set of numbers, terms, signals, messages, and interactions surrounding impression, trust, value and worth.

- | | |
|------------------------------------|--|
| ▪ <i>Competitive Pricing</i> | ▪ <i>Unsurpassed Value</i> |
| ▪ <i>Honest/Consistent Pricing</i> | ▪ <i>Be My Agent "You purchase for me"</i> |

	CURRENT	DESIRED
Somewhat Below Competition (<i>Bogey</i>) =	Level 1 ○	Level 1 ○
Equal to Range of Competition (<i>Par</i>) =	Level 2 ○	Level 2 ○
Better Than The Competition (<i>Birdie</i>) =	Level 3 ○	Level 3 ○
Unsurpassed / The Very Best (<i>Eagle</i>) =	Level 4 ○	Level 4 ○