

“Historically, strategic planning sessions only temporarily rejuvenate our teams. We expect more lasting business outcomes from our investment.”

“We are in a habit of being reactive to the market, and we’ve seen what happens to those credit unions. That can’t be us.”

“Our workforce is changing. We need new approaches to recruit, develop, and retain the next generation of workers.”



STRATEGIC PLANNING FOR CREDIT UNION LEADERS



Turn vision into action.

Credit unions thrive when the board, leadership, staff, and members all work toward a common vision. Engage and challenge teams in a facilitated strategic planning session. An objective advisor with deep industry acumen can navigate challenging topics and identify common goals. Then together design a step-by-step action plan to drive business forward.

INVIGORATE YOUR BOARD AND LEADERSHIP TEAM

- + Step away from the routine and focus on the future as a group.
- + Explore industry trend opportunities. Plan for pivotal decisions ahead.
- + Involve perspectives across the organization to shed light on blind spots.

STRATEGIC PLANNING SESSION PROCESS



HOW DOES FARWELL HELP? | GAIN MOMENTUM

RIGHT-FIT DISCOVERY™

Our no cost, no obligation Right-Fit Discovery™ sets up organizations for more effective projects. We get up to speed before providing solutions.

SIDE-BY-SIDE PLANNING

We work with you to create an optimal solution that will achieve success. We Right-Fit our recommendations so that your goals are achievable and sustainable.

ROLL-UP OUR SLEEVES EXECUTION

We deliver the right expertise at the right cadence, orchestrating successful outcomes. Using our planning as the guide, you can continually confirm we’re creating value.

“48 percent of leaders spend less than one day per month discussing strategy. It’s no wonder, then, that 48 percent of all organizations fail to meet at least half of their strategic targets.” - Harvard Business Review 2020

Focus on these areas to meet strategic targets:



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Turn leadership vision into action with a sound strategy and a step-by-step execution roadmap.