



STRATEGIC ADVISORY SERVICES

Companies open-minded to change never stop succeeding

To stand out among your competitors, your leaders need industry-intuitive partners who offer insights and solutions to enhance value for members and who are focused on your credit union's big picture. Strategic Advisory Services partners with you to identify priorities and objectives by developing a multiprong plan that provides high-level strategic direction.

Strategic Advisory Services goes beyond the limits of consulting by collaborating with you to craft strategy, modernize governance and measure ROI through a results-driven approach. Our subject-matter experts leverage industry-centric experience to assess your goals, risks and programs to design an actionable plan that delivers best practices so you can achieve your desired outcomes and strengthen bottom-line growth.

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Decision-support systems drive results for your credit union by integrating strategy with business intelligence tactics

Our advisers collaborate with industry specialists who understand and believe in your unique business model. By elevating constructive engagement between credit union executives and the board of directors, and adding significant value to the strategic decision-making process, our advisers develop strategic initiatives that lead to a profitable and sustainable future. We employ the latest technology, devise business strategies and boost ROI. We support your strategic vision and successfully integrate change so growth isn't just a possibility but also a reality.

Accelerating and sustaining your credit union's competitive advantage in the marketplace

Credit unions are well positioned to compete against fintechs and big banks by empowering their volunteers and executives to promote financial well-being and authentic customer care. In a recent poll, more than half of credit union members said they were fully engaged by their financial institution, compared to 17 percent at national banks and 37 percent at community banks.*

Your credit union's volunteers and team members provide a strategic advantage, especially when governance is modernized and meticulous business practices are deployed with software tools to measure impact.

By building upon the strong core principles of the credit union movement, maximizing technology and increasing ROI as tactical solutions, credit unions will be fully equipped to thrive in a fast-paced, consumer-centric environment. As your long-term partner, Strategic Advisory Services is committed to your evolving needs. We understand that

there are a lot of moving parts to your plan and, therefore, we provide periodic assessments to ensure your vision and goals are brought to fruition.

What sets Strategic Advisory Services apart?

Our subject-matter experts optimize the power of your software investment with a consultative approach that begins with a needs assessment and results in a comprehensive solution that drives your business forward. Our advisers work in cooperation with you to develop strategic planning, board governance, compliance and policy. We provide CEO executive coaching and HR performance tools that create and sustain a culture of excellence. As a team of advisers committed to conducting due diligence for every client, we provide you with substantiated insights and pragmatic solutions on how to streamline processes and reinvent your credit union to maximize its full potential.

Key features:

- **Planning Pro™** – An all-in-one tool that handles your strategic board, management and staff planning through an automated process, including accountability tracking and progress reporting, comparative data and much more
- **Governease™** – A software solution that includes a series of governance-specific policies to anticipate the common challenges CEOs and boards face
- **Compease®** – Industry-leading salary administration software that helps you attract, retain and engage top talent that is used nationally by approximately 700 credit unions
- **Performance Pro®** – Affordable, customizable online-management solutions that simplify, automate and improve your employee performance management program

You tell us, we listen! We will conduct a thorough assessment of your current business practices and align resources to ensure you get the desired results.

Find out how Performance Solutions can maximize your software investments today by calling **800.940.7522** or by emailing **StrategicAdvisors@CUSolutionsGroup.com**.

*Gallup® poll results: <https://www.cbinsights.com/research/credit-unions-fintech-market-map-expert-intelligence/>