

BD BOOTCAMP

Own Your Market

FI STRATEGIES, LLC

Position your staff to thoroughly execute your business development growth strategies.

In today's highly competitive marketplace, credit unions are finding it increasingly difficult to attract new, younger members and grow, to survive and thrive. Many have turned to business development as their primary strategy to accomplish that growth.

Whether that means approaching local business owners, introducing "bank at work" to employee groups, aligning with community organizations to deliver financial education, or participating in community events, your credit union needs to develop and deploy business development strategies and your staff needs to be trained on how to deliver.

When executed properly, credit unions can drive significant growth through business development initiatives. However, credit unions often lack two critical components to succeed:

- ◆ Strategies that are built on their strengths and tailored to their local target markets
- ◆ The right people with the right skills and behaviors to properly execute the strategies



In BD Bootcamp, we'll help you craft the most appropriate strategies for your credit union's growth objectives and position your staff to deliver on it thoroughly and consistently. We'll help you define the plan, develop and deliver the skills and behaviors, and facilitate the support that'll make it stick.

WHAT IS BD BOOTCAMP?

BD Bootcamp: Own Your Market is a comprehensive 12-month engagement to establish your business development strategy, position your staff to execute it, and hold everyone accountable to deliver what's needed for success.



PLAN

In the initial stages of our partnership, our consultants will walk through a series of assessment steps to fully understand your current environment and conduct planning meetings that'll capture your vision for the future.



DELIVER

Once we know your current state and have articulated your desired future, our consultants will partner with you to deliver the knowledge, skills and regimen necessary for success. Blending industry best practices with content unique to your credit union, your new, enhanced BD environment will take shape.



SUPPORT

Even the absolute best content needs to be reinforced and solidified, if it's to be optimally successful. We will deliver the steps to deepen the skills and behaviors, hold everyone accountable to delivering what they need to deliver, and make course-corrections as needed.

THE PAYOUT

In the end, your credit union will have a unified business development strategy with clearly defined objectives and responsibilities along with built-in accountability. All staff will know how to support your BD efforts and those directly involved will possess the skills and behaviors necessary for optimal success.



Why FI Strategies?

For the past 15 years we've developed growth strategies with credit unions and instilled the necessary sales skills and behaviors with their staff. We'll bring a deep knowledge of what works and doesn't work in BD environments. There is no one-size-fits-all solution so we'll blend proven best practices with tailored content to produce the solution that's perfectly positioned to realize your BD vision and goals.

If your credit union is ready to embark on a new, enhanced business development initiative in your communities, our consultants are ready to help you succeed. **Contact us at fi-strategies.com/contact or 636-578-3280.**