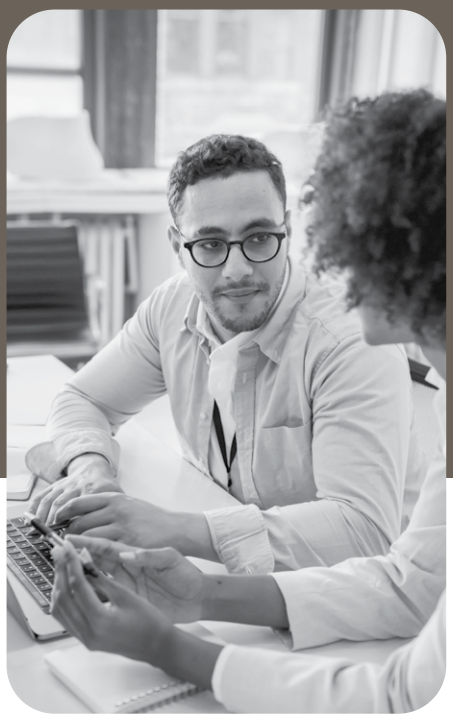
FI STRATEGIES, LLC

Your Partner in Performance & Growth

A Guide to the Capabilities of FI Strategies





In today's highly competitive marketplace, credit unions face many challenges in their efforts to grow and thrive. We've partnered with organizations of every shape and size for over 25 years and today we partner exclusively with credit unions. We know your industry and we know the best practices to implement and the pitfalls to avoid.

We'll tailor a solution that'll turn your vision into actionable strategies, align leadership around what matters most, and drive the accountability and execution needed to deliver measurable results and sustainable growth.





CULTURE

We'll help you create and sustain the culture your credit union needs to continue growing and thriving in today's and tomorrow's environment.

CULTURE ASSESSMENT

If you want your culture to be a differentiator for members and employees, you need our Culture Assessment to make sure it truly does, in fact, make you stand out for the most positive reasons.

Create a culture across the entire organization that is tightly aligned and focused on living your vision and meeting the credit union's goals; produce a new or enhanced culture strategy that'll help maximize performance and sustain success.

Our consultants provide an unbiased diagnostic of the credit union's culture based on our proprietary model, consisting of the eleven components we know are critical to sustainable success. The process includes surveys, focus groups, interviews, and reviews. It concludes with an executive presentation where we deliver the findings and present very specific improvement recommendations.

YOUR WAY

Your teams and individuals need to be synched and working toward a shared vision and common goal. Creating your "way" builds unity, motivation, and pride across the credit union.

Specify what every employee and team across the credit union needs to do to consistently and thoroughly live your mission, vision, and values; put that definition at the heart of everything you do as an organization.

Most credit unions have mission and vision statements, and some have core values, but this engagement works with you to show every employee how to live them in every interaction. Whether with members or co-workers, we'll set the standards for creating and sustaining great experiences and the process for holding everyone accountable. That's what we call "Your Credit Union's Way"!





EXPERIENCE

We'll instill the skills, behaviors, and regimen your credit union needs to create consistently great experiences – for both members and co-workers.

SALES CAMP

Faced with aggressive growth goals? Service alone won't get you there; you need Sales Camp to enhance the relationship-deepening skills and advanced processes for staff to realize those growth goals.

Elevate the skills and behaviors of all member-touching staff that'll position them to be able to deepen all member relationships, today and in the future.

Credit unions can't rely solely on the service culture they've firmly established; they need to elevate to a sales environment. Through a variety of resources, including onsite and virtual workshops, our consultants will teach you how to deepen relationships with every member. We'll provide skill development that fits your definition of sales, a sales model that's easily applied and highly successful, and the regimen necessary to achieve optimal long-term success.



BD BOOTCAMP

Owning the markets you serve is a challenge for many credit unions, especially if you rely on branch staff to carry the load. You need BD Bootcamp to teach them how to do this thoroughly and consistently.

Create and instill a highly effective business development initiative that'll fuel growth by attracting new members to the credit union and cultivating their relationships over time.

Most credit unions look to business development to attract new members while serving their local communities. We'll help set the strategies for each market and select the team that'll carry out those strategies. We'll develop their skills and protocol and establish measurements of performance. In the end, you'll have a thoroughly defined business development regimen positioned for the highest levels of success.



EXPERIENCE

We'll instill the skills, behaviors, and regimen your credit union needs to create consistently great experiences – for both members and co-workers.

SPACE CAMP

New physical spaces can be expensive and transformative but the change can also be challenging for staff and members. Space Camp teaches staff how to maximize performance on day one and deliver outstanding experiences to that very first member.

Train staff on how to fully utilize their new physical environment to its fullest. Get each individual confident and competent in providing great experiences for members and co-workers.

The role of the physical branch has changed, and your people need to change with it. That means learning new skills and behaviors necessary to maximize performance in their new environment. Through a hands-on, totally immersive, totally customized workshop, our consultants will walk staff through the new physical layout, spotlighting key design features and teaching them how to create consistently great experiences in their new "home".



READY TO GROW

Setting plans, aligning resources, and executing consistently are critical for your credit union to grow. Our Ready to Grow engagement delivers the plans, structure, and discipline needed to thrive long into the future.

Create tactical plans that'll position your credit union for maximum growth today and over the next three to five years; thoroughly deploy those plans to achieve your vision and growth goals; and create the accountability that'll minimize distractions and maximize focus.

An immersive engagement that builds on your strategic plan and priorities, our consultants partner with your leadership teams to develop and deploy the tactics that'll position you to be optimally successful. For most engagements, we become your accountability coach, conducting regular progress review meetings to keep everyone on track and make course corrections, as needed until you realize your goals.



LEADERSHIP

We'll help you advance the skills and regimen of every leader at every level and maximize the performance of their direct reports.

COACHING CAMP

Individually, managers need to transition into great coaches and leaders of their staff. Collectively, they need to establish their best coaching and leadership regimen at every level to position teams for maximum success. Coaching Camp delivers both.

Maximize the leadership skills of every people-leader in the organization, establish a new and disciplined coaching regimen at every level, and get leadership teams working in the most unified, collaborative, and cohesive manner.

A fundamental and advanced development process where we test a leader's current coaching and leadership performance and competencies; provide onsite and virtual workshops to build their skills and regimen; and conduct follow-on 1-on-1 coaching sessions to hold them accountable. These engagements are a blend of proven best practices and the credit union's unique vision and desired coaching and leadership culture.



THE LEADERSHIP 360

When leaders and leadership teams are ready for a deep dive into maximizing their effectiveness, The Leadership 360 delivers. Blending proven leadership competencies with an industry-specific focus, it'll provide the perspective most leaders need – but rarely receive – to be the best they can be.

Assess the leadership performance of every leader from multiple perspectives across multiple components of leadership; produce a personal report that'll show each leader where their future development efforts should be focused.

A proprietary tool that delivers a 360-degree assessment of people-leaders at every level and based on the leadership competencies proven to be successful in credit union environments. Leaders receive a personal feedback report and create a 90-day improvement plan solidified with three months of Field Coaching to help them implement their plan and improve their leadership performance.



LEADERSHIP

We'll help you advance the skills and regimen of every leader at every level and maximize the performance of their direct reports.

FIELD COACHING

Many leaders – execs and managers – have never had personalized, intense, and consistent leadership coaching. Whether novice or veteran, Field Coaching delivers the 1-on-1 development and partnership they need to up their leadership game.

Provide a personal coach to every people-leader – from CEO to manager – and help them establish and execute a success plan that'll make them the best coach and leader they can be.

A deep and ongoing engagement that starts with a leadership assessment and continues with 1-on-1 coaching meetings each month as well as the creation of a personal development plan. Each meeting will hold them accountable to implementing their plan as well as addressing the issues and challenges unique to their teams and environments. For most leaders, this engagement lasts at least one year and is blended with *The FI Success Coach*.

THE FI SUCCESS COACH
(COMING NEXT YEAR!)

Before and after every situation, The FI Success Coach is your staff's personal digital coach that'll help them grow and enhance their performance. It fills the gaps in coaching that inevitably occur and consistently instills the support and confidence each employee needs.

Provide an on-demand, modern tool that delivers personalized coaching and specific feedback to staff, reinforcing the skills they've learned and positioning them to be consistently successful.

A proprietary AI tool delivering on-demand coaching across the credit union. This tool works in collaboration with our personalized Field Coaching sessions and supports each employee's personal success plan. Before, during, and after every member interaction, the "AI coach" is at their disposal to help think through and practice how to be most successful, every time with every member and associate.





ENHANCEMENTS

Every credit union partnership has a large component that is customized to your needs. In addition to the solutions noted previously, we often also deliver the following components.

THE CU INSTITUTE

Learning and reinforcement in bite-size chunks – all staff can access The CU Institute to reinforce training, solidify skills and behaviors, and maintain focus on the topics most critical to your teams' success.

Provide video and print resources at your fingertips that'll refresh and enhance the skills and behaviors taught in service, sales, and coaching engagements we help you deliver.

An evolving catalog of long and short-form videos that substantiate the skills and behaviors presented in our sales and coaching workshops. They should be used on an as-needed basis to help staff maintain focus and enhance their skills. These videos are included in every skill-building engagement and will be sold on a subscription basis in the future.



TALENT ASSESSMENT

A team needs the right players and they need to be in the right positions to have the best chance of winning. Our Talent Assessment gives you confidence that you have the right staff and they are properly positioned to deliver on your goals and strategies – today and in the future.

Make sure you have people with the right talents, skills, and motivations in the best positions to execute your plans and meet your goals – recognizing that the "right" players tomorrow may be different than the ones you've had in the past.

Our team of consultants brings an unbiased, third-party perspective and we facilitate an immersive assessment process, in collaboration with your executive team, that'll spotlight alignment between the select staff and your desired future expectations for their roles. In the end, we'll produce a scorecard showing your team's current readiness and a detailed roadmap for optimizing their future performance.



Let's Talk Partnership

FI STRATEGIES, LLC



If you're a current partner, **thank you** and we'd like to expand our partnership to its fullest.

If you're a prospective partner, we'd like to help your credit union grow and improve as much as possible.

We believe every engagement with a credit union is a partnership, combining our knowledge of best practices from within as well as outside the financial services industry and your unique cultures and challenges. It's not that our way is best; it's that together we will produce something that elevates your credit union to the highest level of performance.

Let's talk about your distinct needs and goals and how FI Strategies should be your strategic partner for delivering the tailored and impactful solutions that'll position your credit union to grow and thrive long into the future.

Reach us at:
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