

CU Professional Services



Strategic Planning Division

“We Guarantee that if you are truly not satisfied with the initial planning session and development of your strategies, that you will pay nothing for the session.”

The only expense you will incur are facilitator travel expenses incurred, if any.

Credit Union CEO,

“What I like best about this process is that we don't spend all day massaging financial numbers. We're pretty good at managing the numbers and get enough of that with our monthly Board meetings and reporting. Walt's process finally provided guidance on and separation of Board and management roles and has allowed us to maintain balance between strategy and tactics throughout each year to improve results. And now our Board stays focused on strategy, not on micromanaging the operations. With previous facilitators, our sessions were always focused on numbers, in these sessions we are able to get beyond those limitations and build real strategies that lead to action plans and measurable goals.”

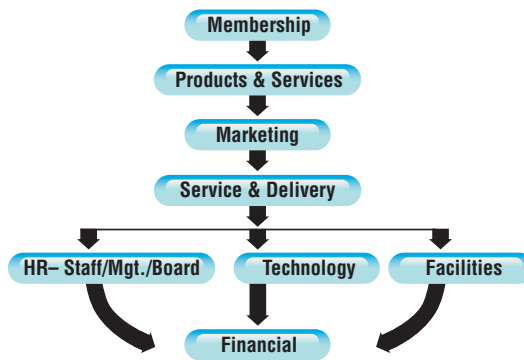


Is it Time for a Change? “You Can't Expect Different Results in the Future By Doing the Same Things You've Done in the Past”

CU Professional Services delivers a Credit Union specific, proprietary planning process that focuses on results... We know that strategic planning, especially today can be an overwhelming and frustrating process, and while many facilitators merely facilitate a session that produce limited, to no measurable results, our Strategic Planning process was developed specifically for Credit Unions and it's guaranteed to get results!

The Strategic Hierarchy Process

Our process is based on guiding you through the development of strategy statements in eight specific and key strategic areas and then translating those strategies into actionable, achievable goals... Providing hands-on follow-up and guidance throughout the implementation process to assure each goal is being implemented and strategy is attained in each of the 8 strategic areas defined below:



In the hierarchical process, creating your membership strategy then drives all other strategy development, assuring alignment of your Products and Services, Marketing and Service/Delivery strategies. Completing the process with strategies for HR, Technology and Facilities, as well as Financial leads to the ability to create clear and concise organizational plans that can be implemented and supported to achieve consistent results based on your overall strategies.

Results Are Guaranteed

No other provider we are aware of provides a money back guarantee! One of the most common responses we get from clients is that this is the most significant planning process they have ever encountered, and clearly without the guidance and direction we provided, that they would not be where they are today. In other words, the strategies and process provided through our system got them and kept them focused to accomplish their objectives.

Buy-In and Consensus

Because the strategy is built and Approved by all participants, organizational buy-in is inherent in the process. Imagine truly being able to define and agree on your entire strategy!

Annual Goals and Action Plans

The strategy statements then drive the development of specific goals and action plans as well as acting as a guide for all future Management recommendations and Board decisions.

Management Tools

Our process provides all of the necessary tools to continue to manage your Credit Union's strategic direction and momentum, all within your financial resources and other boundaries.

If you are looking for a true strategic plan and are considering a change, contact us today for a discussion of the process, and availability for the remainder of 2009.

Your Credit Union Outsource Solution

For more information and to get started, contact:

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