



STRATEGIC PLANNING

Value: Symphony has assisted credit unions with future planning and strategy development for more than 30 years. Our passion for credit unions, combined with our deep knowledge of credit union management, uniquely qualifies us to build lasting plans for growth and achievement.

Benefits: Symphony understands that strategic planning should reach past the boardroom and positively impact every employee and member. An effective strategy will also create a strong culture by clearly defining and aligning your mission, vision, and objectives with a singular direction for everyone involved.

Services: Symphony's comprehensive planning process features detailed analyses, plan formulation, strategy implementation, as well as ongoing evaluation. We identify market opportunities, navigate challenges, and execute thoughtfully designed plans to ensure future success.

Process: Symphony takes a collaborative approach to the planning process. We routinely connect our experienced facilitators with boards of directors and key staff members to develop your own customized blueprint for success.

Listed below are the basic steps of our planning process. Considering that credit unions have diverse needs; we tailor our strategic planning projects to meet those same unique conditions.

1. Assess current strategy and business environment.
2. Collect and analyze relevant market data.
3. Identify goals and objectives.
4. Develop detailed plans and performance metrics.
5. Implement and communicate plan.
6. Monitor and revise plan as needed.

Contact us at

info@symphonycuso.org



SYMPHONY
INSTRUMENTS FOR SUCCESS

symphonycuso.org
800-470-3444, Option 8