

# CEO STRATEGIES

THE ULTIMATE BOOT CAMP

# THE ULTIMATE BOOT CAMP: CEO STRATEGIES

## OVER A DECADE OF CONVERSATIONS WITH CREDIT UNION CEOS

<b>2007</b>	What a CEO Should Know about Member Data; Leading Meetings; Driving the Buzz With Your Membership; Understanding Service Income; Networking Credit Unions for Growth; Working Under the Best Contracts
<b>2008</b>	What CEOs Should Have On Their Radar: Achieving the lowest cost of going active with innovation; Having the lowest cost in the industry for compliance; Being known as one of the most aggressive mortgage servicing networks
<b>2009</b>	Getting a Handle on Automated Service Income; Pinning Down the "Duh" Statistics; Learn From a Peer; Reviewing CEO Dashboards
<b>2010</b>	Putting on your Developer Hat; Introducing the Analytics Team; A new style/template for analysis; Micro-awareness vs. Micromanagement; Pushing the buttons (or assigning someone to push them for you)
<b>2011</b>	Building Solutions With the Spirit of Collaborative Venture Capitalists: What a CEO Needs to Know (pushing the buttons or having someone push them for you); CEOs as Solution Designers; CEOs Inspiring Your Teams to be Developers; CEOs Creating an Innovator's Culture
<b>2012</b>	A Community Focused On Driving Opportunity: Actionable Analytical Approach; Making Ownership Real; Do You Have an Online Channel Strategy?
<b>2013</b>	Responding to the Challenges of Big Data: Actionable Analytical Approach 2.0; Patronage Databases; Big projects where CEOs need to lead the way
<b>2014</b>	Actionable Analytical Approach 3.0; Moving Data to the Edge of Your Cooperative; Retooling for the Next Decade at CUs & Our CUSO
<b>2015</b>	Data 2016, Behind the Firewall; Data 2016, Out in the Open, Extended for the World to See; Building a Collaborative Bench of Data Analysts
<b>2016</b>	Engaging a Data Focused World: Executive Awareness Of Data and Trends, Internal Tools Moving Outside of CU*BASE, What are your employees doing?, Virtual Contact Channels
<b>2017</b>	Data in action; What does data mean to an Internet Retailer; What does it mean to add a data administrator to your organizational chart

# WHY DO WE COUNT ON CEOS FOR SUCCESS?

WE WORK HARD TO LISTEN TO THE CROWD, BUT CEOS ARE STILL THE KEY INGREDIENT

- Credit union CEOs have the responsibility of being the intersecting point between:



- Unless CEOs do their job for both sides of this question, we'll never effectively match solutions with the efforts of CUs in our network
- In our win-win solution, **CEOs represent the owner persona**, and CU staff represents the consumers
  - A CU looks at a *person* for these two roles; our CUSO looks at an *organization* for these roles in our future

All CEOs don't need to be active

The same CEOs don't need to be active every time

But we need a healthy community so that there is a material group of CEOs active at the right times

# WHY DO WE COUNT ON CEOs FOR SUCCESS?

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- Credit union CEOs intersect

Who are the CUS

- Unless CEOs do we'll never see CUs in our

- In our win solution **persona**, and CU staff

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INGREDIENT

**We started with CEOs to inspire a strategy – a data strategy – and look how far we've come**

**Thank you to all of our participating CEOs over the years...but now it's time for a change**

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Some CEOs don't need active every time

But we need a healthy community so that there is a material group of CEOs active at the right times

# NEW FOR 2018: THE "CEO STRATEGIC DEVELOPERS" BOOT CAMP

## STEPPING UP OUR GAME FOR THE "ORIGINAL" BOOT CAMP

- **THEME: Prioritizing What We Take To the Future**
  - As a CUSO, what do we want to manufacture?
- **AUDIENCE:** Senior-level executives with overall strategy responsibilities
- **EVENTS:**
  - Segment A: Designing the Future of Internet Retailing
  - Segment B: Designing Teller Platforms for Our Future (Teller P3-2019)
  - Segment C: Designing the Future for Online and Mobile Tools (Online '19)
- **LEARN MORE: [lc18.info/CEO](http://lc18.info/CEO)**

NEW FORMAT COMING  
**NOVEMBER 5-9, 2018**

1 ½ days per session,  
repeated three times  
during that week

First-come, first-served:  
spots available for only  
**69** total participants  
(23 per session)

# SO WHAT ABOUT CEO SCHOOL?

WE'LL STILL HAVE A FULL WEEK FOR CU SENIOR EXECUTIVES WITH THE CU\*ANSWERS CEO

- New full week of courses being added to the CU\*Answers University
  - Building Trust with Cooperative Owners: CUSOs and CUs
  - Understanding the CU\*Answers SDLC and Promoting Projects
  - Adopting and Highlighting a Retail Strategy as a Senior Executive
  - Evolving Retail Strategies Tactically: Facing the Inevitable Internet Influence
  - Building a Firm with Digital Intelligence, and Proving it to the Marketplace
  - Action Through Consumer-Owners: Developing Delivery Channels that Face Both
  - Reporting Up, and Delegating Down: Building Trust With Your Team and Your Board



**An extension of the CU\*Answers Executive Study series, for students of cooperative design leadership**

# OUR 2019 DEVELOPMENT AGENDA

A

Designing the Future of Internet Retailing

What will CEOs tell us about facing the inevitable?

The CUSO needs to spend 10x on OLB and mobile LOS – we need your leadership

B

Designing Teller Platforms for Our Future (Teller P3)

One-size-fits-all is not the future

The CUSO needs to better understand your strategic evolution for tellers, more than the tools tellers would like today

C

Designing the Future for Online and Mobile Tools (Online '19)

More evolution, or a concentrated effort at integration?

What do CEOs think will work?

# OUR 2019 DEVELOPMENT AGENDA

A

Designing the Future of Inter...  
What CEOs talk about facing the

*To the CEOs in the room:*  
Are you thinking that you're not the  
subject-matter expert for these  
questions?

spend 10x on OLB and  
leadership

B

Planning for the Future  
future

You're thinking wrong. We're not  
talking just tools here, we're talking  
what you'll *do* here.

to better understand your  
rs, more than  
lay

C

Designing the Future of Online and  
Tools (Online)  
concentrated effort at

What CEOs think will work?