CLJ*ANSWERS

2020 CEO Roundtable

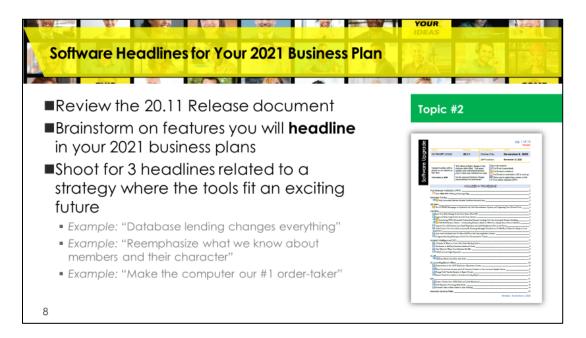
November 11, 2020

Notes from CEO Participants



Topic #2

The conversation:



Participant responses:

	Strategy for my 2021 Business Plan	Tools from the 20.11 release to fuel this strategy
1	 More and better automated self-serve tools for members Do more of the strategic time for planning the future Schedule strategic review of the release materials 	 Member secured CD loans, FUEL, and CLR Path Use new tools and current tools to make good decisions FUEL and CLR Path Release documentation
2	 Grow loans more efficiently Come back to basics and find and use valuable tools on CU*BASE Hold staff accountable for reviewing the release materials and telling me why I would care – How will this make our world better 	 Member secured CD loans, FUEL, and CLR Path Get back to a focus on Analytics Booth Free Training and Concierge Services that will transition their thinking from operational to strategic

		Train my staff to write the headlines for me
3	 Leverage business intelligence and data warehouse as a source of actionable opportunities Communicate to the board your enthusiasm 	 Link to CU*BASE and other databases to provide value Testimonials from me and from my staff – highlight reports, tools and my plans that inspired action from the tools in the release