

ARE YOU READY TO GROW?



your marketing. 
relationships • ideas • results

Are you ready to take your credit union to the next level? We've spent a lot of time working with credit unions to perfect our proprietary process that leads to unprecedented success. While our process is in-depth and two days of work, we've provided the worksheets on the following pages to walk you through one small step that has led our clients to gaining the perspective needed to make changes and reap success. Here's the exercise that begins on day two of our strategic planning sessions.

INSTRUCTIONS: On the following pages, we'll ask you to break your credit union into six areas: operations/processes, leadership, culture, strategy, sales/marketing, and risk.

1. For each of the six areas, think about where you are now in that area and describe your vision of what that area in your credit union looks like 12 months from now. Think about the struggles and obstacles currently keeping that area from being the best it can be, and then write down what that area of your credit union would look like in a perfect world with those obstacles removed.
2. In the second column, identify the top things that could hold you back from achieving your vision for that area of your credit union. HINT: Lack of accountability and task saturation are two things that commonly come up during this discussion!
3. In the last column, rank each area from 1 to 6. Number 1 is the area that needs the most attention and focus, number 6 is the least urgent of the areas that need attention and focus.

➤ **Ready? Let's get started!**

OUR VISION: OPERATIONS /PROCESSES		RANK
What does the next level look like?	What could hold us back from achieving this?	



Great Idea! Let's Get Started.

Now that you've spent some time

thinking about your vision for the credit union, answer a few questions:

1. Would other leaders and my board give the same answers as I did?
2. Who else in our credit union do I need to share this exercise with to compare notes?
3. What areas did I struggle with the most?
4. What one thing can I act on right now that would be a good first step in achieving my next level vision for the credit union?

Stuck on what to do next?

Want to talk out this exercise with someone from the outside?

Our passion at YMC is helping credit unions gain perspective to remove the obstacles keeping them from growth and set the foundation for growth. Email our President and CEO, Bo McDonald for a complimentary 60-minute call to decide if our proprietary strategic planning process is the right investment to take your credit union to the next level.

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About Your Marketing Co.

We choose to work only with credit unions and community banks who care about the people and communities they serve because they're the ones who will ultimately affect change for the betterment of those around them.

Outsourced Marketing

This is the stand-out service that has made us one of the most sought-after marketing teams in the financial industry. Think of the functions you would entrust to an accomplished VP of Marketing.

That's us.

If you don't have a marketing department, we function as the equivalent of having an entire in-house marketing team without the overhead. We provide a one-stop shop for expertise and strategy. We truly integrate into your organization and become part of your leadership team.

For financial institutions with employees devoted to marketing and business development, our team complements yours. No more freelance contractors for copywriting, graphic design, social media or digital marketing. For brand consistency and target messaging, with YMC you have a strategic partner for execution and accountability.

We refuse to be labeled as another vendor. We build relationships and work with, not for, credit unions and local banks. It's what makes us successful, and more importantly what makes our clients successful.

Strategic Planning

Forget the tired SWOT analysis. We will peel back the layers of your financial institution. You will see where you have been, where you would like to go and how to convert challenges into opportunities to grow through an actionable to-do list.

Our strategic planning sessions are designed to get you unstuck and moving forward with vigor. We pride ourselves on delivering productive plans that deliver results while improving your bottom line.

Rebranding & Brand Development

You can't think outside the box unless you know what's in it. Our job is to integrate your voice into everything that connects to you. We promise to take the time and effort to get to know you, your fans, and your community to deliver a brand identity across all marketing channels that is altogether authentic, insightful and awesome.

The brands we really love make us feel like we belong. It goes beyond coining phrases and fun names. Our job is to help capture the warmth and competence of your organization. ●