



## PLANNING PRO

### Exceeding board expectations starts with Planning Pro.

Every credit union aspires to consistently improve its operations to stay relevant in a competitive industry. It's essential that credit unions evolve as forward-thinkers by leveraging technology, especially to propel their vision and goals forward. In this age of innovation, credit unions are challenged to exceed member expectations. One way to accomplish this is through streamlining or reinventing processes, collaborating effectively with staff and planning for the future.

The future of your credit union depends on a sustainable strategic plan, but strategic planning can be a lengthy and sophisticated process. Shaping a clear vision by developing a strategic framework and defining short and long-term goals that align with key performance indicators take commitment and resources. Strategic planning requires a cohesive and communicative approach by gathering input from multiple team members and diving deep into data. It calls for letting go of long-held assumptions and revising the plan as needed to perfect an enterprising yet achievable strategy.

  
**Planningpro**<sup>TM</sup>

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## Priorities are more likely actualized by systemizing a process for engagement and collaboration.

Thoughtful planning demands the investment of time and energy - which is in short supply. That's why it's essential to use an automated communication tool that allows stakeholders from each area of the credit union to participate in the planning process. By utilizing strategic planning software, the board, management and staff planning process is managed, monitored and measured through a systematized and failsafe way. Engagement and collaboration is ensured through a transparent, time-saving, and user-friendly approach.

## Drive board confidence, buy-in and satisfaction with technology that makes a difference.

Planning Pro is a complete strategic planning solution that helps you define success, take action and measure results. It equips you with the tools needed to craft and manage a successful strategic plan with ease and confidence. Its flexibility empowers you to control the amount and level of detail included, and generate easy-to-absorb reports.

Planning Pro removes frustration from the strategic planning process. Through our automated software program, you have the capability to seamlessly analyze peer data and capture results related to auditing, succession planning, disaster recovery and lending compliance. You can generate monthly or quarterly board reports to determine progress against key performance indicators and show how that progress impacts CEO compensation planning.

## What sets Planning Pro apart?

Planning Pro streamlines processes by consolidating strategic initiatives into one real-time solution such as monitoring executive performance, corporate goals, and branch/operational goals. It adds value by driving focusing on goals, action steps, and KPIs and then facilitates the delivery of clean, current, and comprehensive reports to the board, management team and staff.

## Key Features:

- Delivers real-time reporting to the board of directors that is as comprehensive as it needs to be for any given strategic objective
- Revises and updates strategic plan easily with multiple stakeholders using a single tool
- Strengthens team cohesion and communication through collaborative goal setting
- Creates plans that integrate strategic and organizational financials to promote visibility and drive performance
- Incorporates peer analysis, benchmarking and reporting.
- Ensures more transparency and accountability in the planning process
- Monitors team members' progress on key priorities, goals, action items and more
- Creates and updates presentations automatically

Learn more about Planning Pro by calling **800.262.6285** or by emailing **[Info@HRPerformanceSolutions.net](mailto:Info@HRPerformanceSolutions.net)**.