

An E-Scan Resource

STRATEGIC PLANNING GUIDE

2009-2010



CUNA

Credit Union
National Association



Section 1: Pre-planning

Introduction

For the senior management team and facilitator

Materials

For the facilitator

Timelines & Tips

- Logistics Questionnaire
- Pre-planning Questionnaire
- Recommended Strategic Planning Agenda

Facilitator's Outline

A brief description of each activity in the planning session

Section 2: Planning Worksheets & Handouts

Day 1

(Directors and senior management team)

Welcome & Introductions

- Warm-up Exercise
(Handouts: Warm-up Exercise)
- Participant Objectives
(Worksheet: Participant Objectives)
- Recommended Strategic Planning Agenda
(Handout: Strategic Planning Agenda)
- Expectations/Ground Rules
(Handout: Expectations/Ground Rules)

Industry Trends/Forecast

- E-Scan Presentation
(DVD and/or print version of Environmental Scan)
- E-Scan Discussion

Scenario Planning

(Worksheet: Scenario Planning)

Innovation Exercise

(Worksheet: Innovation Exercise)

Focus on Financial Excellence

(Worksheet: Key Result Areas)

(Worksheet: SWOT Analysis)

Setting Goals

(Worksheet: Setting Goals)

Section 2: Planning Worksheets & Handouts

Day 2

(Senior management team only)

Execution: Goals/Strategies/Tactics

(Worksheet: Goal Planner)

Monitoring the Plan

(Worksheet: Strategic Plan Monitoring)

Evaluation

(Handout: Evaluation Form)

Section 3: Supplements

Characteristics of Planning & Vision

Sample Worksheets

- Scenario Planning
- Innovation Exercise
- Key Result Areas
- Goal Setting
- Goal Planner
- Plan Monitoring

Strategic Planning Resources

- Overview
- Definitions of Terms
- History & Characteristics of Strategic Planning
- Additional Resources
- Acronyms