

STRATEGIC INSIGHTS. TRUSTED ADVICE.



Strategic Leadership Series



About the Strategic Leadership Series

Delivered through a series of Perspectives Reports, and supported by advisory services including strategic planning support, the Strategic Leadership Series was developed to provide credit union leaders with valuable, objective insights into the most relevant industry trends and innovations impacting the future of the movement.

Primary Focus Areas

» Member Experience ...

The changing nature of financial services delivery and distribution requires credit unions to balance investments across multiple channels - from physical branches to the latest virtual delivery options. Understanding shifting behaviors and preferences in members' use of channels - and executing strategies that provide a frictionless experience for them - will be essential in an intensely competitive market.

» Payments ...

The rapid evolution of payment methods requires credit unions to make appropriate business and technology investments to remain relevant in - and increase revenues from - this highly strategic and lucrative line of business.

» Emerging Technologies ...

Technology is one of the primary catalysts in the transformation of the financial services industry. Understanding the nature and potential impact of emerging technologies - and determining appropriate actions - will be a critical element of credit unions' ability to remain relevant within their Fields of Membership and grow their businesses.

Annual Membership includes:

Access to 8-10 Perspectives Reports (authored by Mark Sieviewright) on Strategic Trends, including the following topics:

- Business Model Change
- Delivery & Distribution Channels
- Emerging Technologies
- FinTech Sector
- Member Experience
- Payment Services and Systems
- Regulation and Compliance
- Service Quality
- Small Business Trends
- Strategic Planning
- Technology Strategy
- ...and more!

A look into past PERSPECTIVES REPORTS ...



"At the epicenter of my beliefs about the future is that the pace at which we are adopting new technologies is accelerating, and fast!"

"The U.S. payments system is undergoing rapid (arguably, unprecedented) change as innovation, technology advances, consumer preferences and increased competition continue to redefine this highly valuable and lucrative aspect of the financial services business."

"The digital footprint each consumer produces has grown exponentially over the last 10 to 15 years. Combined with advances in data analytics, credit unions now have the ability to develop insights like never before, and they are investing heavily in that strategy."



**STRATEGIC
LEADERSHIP
FORUM**

Members of the Strategic Leadership Series are invited to attend an exclusive annual event - attended by credit union leaders from around the country - to exchange ideas and explore trends within the financial services industry. The inaugural 2019 event was held at Pebble Beach, California.



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Scan this code to request a complimentary copy of the Perspectives Report:



ABOUT SIEVEWRIGHT & ASSOCIATES

With more than 30 years of financial services experience, Mark Sieviewright has worked directly with numerous credit unions in the successful formulation and execution of their strategic plans, and is the recipient of a number of industry awards. In April, 2017, Mark established Sieviewright & Associates and is uniquely focused on providing credit unions with valuable strategic insights and trusted advice to drive business growth, effectively and efficiently. Mark has spoken at hundreds of credit union conferences both in the U.S. and overseas.



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