



## PLANNING PRO

### Exceeding expectations starts with Planning Pro.

The best laid strategic plan is going to fall apart if those executing it don't clearly understand their roles in shaping its success. Planning Pro keeps everyone on the same page and up to speed with tools that help you define success, take action, measure results and, if needed, pivot.

Priorities are accomplished by framing a process for engagement and collaboration.

Planning Pro consolidates strategic initiatives into one real-time solution and drives focus on action steps and KPIs at every level of the organization, allowing everyone from the board to front line staff to engage with the strategic plan. Automated communications facilitate the delivery of clean, current and comprehensive reports that make keeping everyone on the same page a snap.



For more information about how LEVERAGE can assist your credit union with Planning Pro, email [consult@myleverage.com](mailto:consult@myleverage.com) or call 855-9EXPERT (855-939-7378).



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

Through our automated software program, you have the ability 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.

### Key Features:

- Delivers real-time reporting to all credit union leadership
- Revises and updates strategic plans easily with all stakeholders using a single tool with start-to-finish project management
- 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 with all information in one place
- Ensures more transparency and accountability in the planning process
- Monitors team members' progress on key priorities, goals, and action items to understand overall impact
- Creates and updates presentations automatically



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