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## Reducing Strategic Friction

*Turning Strategic Planning from an Annual Reset into a Continuous Operating System*

**Day of Discovery # 28**



*ProStrategy.ai Patent Pending*

*AI-enabled strategic planning operating system*

*The challenge is not strategy quality...  
the challenge is strategy capacity.*

## **Small Credit Union Reality**

- Same regulatory burden as larger institutions
- Board expectations identical to \$1B+ peers
- 3–5 people wearing 10 hats
- Strategy competes directly with daily survival
- No dedicated strategy or analytics function

## **Large Credit Union Reality**

- Dedicated strategy staff, but siloed
- Multiple transformation initiatives competing
- Complexity replaces scarcity
- Alignment breakdown across departments
- Initiative overload without prioritization discipline

### ***Insight:***

***Small CUs struggle with capacity.***

***Large CUs struggle with coordination.***

***Both struggle with friction.***



# Why Traditional Planning Breaks Down

## Small CU Challenges

- Offsites consume scarce leadership time
- Plan gets written but not operationalized
- Quarterly tracking rarely sustained
- Momentum lost due to staffing constraints

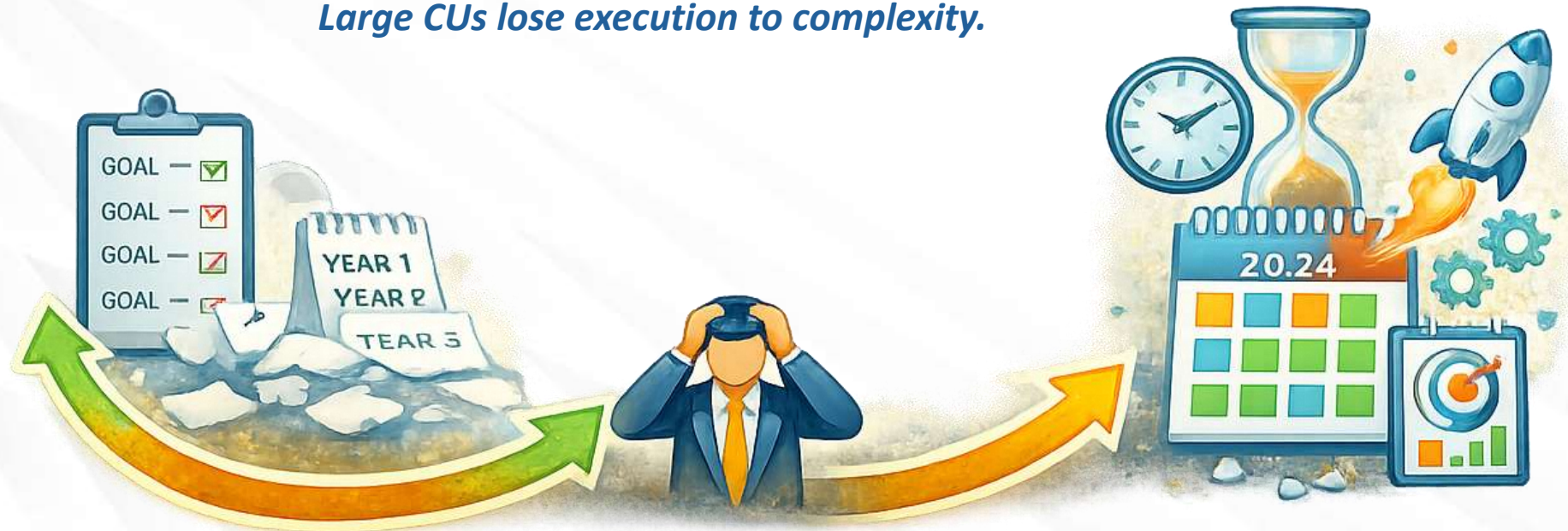
## Large CU Challenges

- Massive decks, diluted ownership
- Too many parallel initiatives
- Departments reinterpret strategy differently
- Reporting becomes performance theater

### *Insight:*

*Small CUs lose execution to bandwidth.*

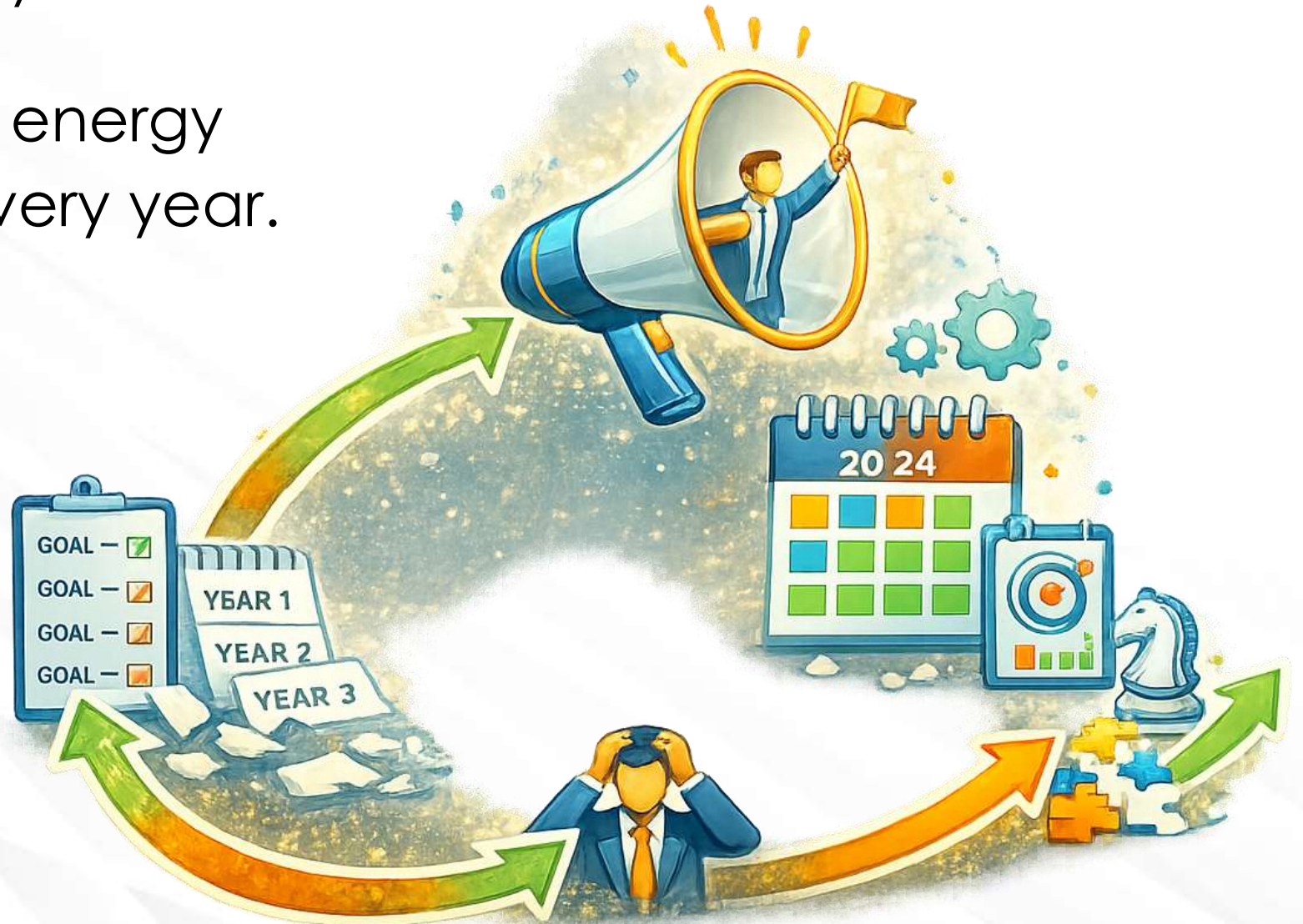
*Large CUs lose execution to complexity.*



# The Right Message

**Not:** Do better strategy.

**Instead:** Stop wasting energy recreating strategy every year.



# The Primary Angle

## Reduce Strategic Friction

- Everyone feels friction
- No one feels broken
- It validates lived experience



# Shift #1: Annual Reset → Strategic Continuity

## Small CU Fear

- “We don’t have the staff to sustain multi-year tracking.”
- Reliance on informal accountability
- Planning feels episodic

## Large CU Friction

- Multi-year goals exist — but aren’t linked
- Departments reset language every year
- Technology and operations run on different timelines

## Unified Truth:

Continuity compounds value — regardless of size.

- *From annual resets and lost momentum*
- *To multi-year goals that carry forward*
- *Progress compounds over time*



# Shift #2: Planning Overhead → Strategic Infrastructure

## Small CU Pain

- Planning feels like a luxury
- Offsite prep overwhelms small teams
- Execution pauses during planning season

## Large CU Pain

- Endless meetings to maintain alignment
- Infrastructure exists, but it's fragmented
- Strategy lives in PowerPoint, not operating rhythm

## Insight:

Small institutions need light infrastructure.

Large institutions need disciplined infrastructure.

- *From offsites and decks consuming bandwidth*
- *To embedded planning infrastructure*
- *Less disruption, more carry-forward*



# Shift #3: Alignment by Meetings → Alignment by Design

## Small CU Version

- Alignment happens informally
- Too dependent on CEO interpretation
- Role clarity can blur quickly

## Large CU Version

- Alignment requires cross-functional choreography
- Misalignment is expensive
- Initiative conflicts appear late

## Shared Challenge:

Meetings don't create alignment.  
Shared structure does.

- *From constant meetings to stay aligned*
- *To shared structure across departments*
- *Clear line-of-sight from vision to action*



# Shift #4 & #5: Focus and Value

## Small CU Reality

- Hard to say “no” when every initiative feels critical
- Activity reporting used because value measurement feels heavy
- Board wants clarity, but staff capacity is thin

## Large CU Reality

- Saying “no” is politically difficult
- Activity metrics look impressive
- Board dashboards overloaded with vanity metrics

## Universal Friction:

Both sizes struggle to translate activity into value.

- *From doing everything to explicit trade-offs*
- *From activity reporting to board-relevant value*
- *Strategy defines what not to do*



# What ProStrategy.ai Delivers

Now this becomes powerful:

## For Small Credit Unions

- Structure without adding staff
- Simplifies governance
- Preserves continuity
- Reduces executive cognitive load

## For Large Credit Unions

- Cross-departmental visibility
- Eliminates initiative collisions
- Creates board-ready value aggregation
- Makes complexity governable

## Positioning Line:

ProStrategy.ai scales friction down for small institutions and scales complexity under control for large institutions.

- *Turns planning from an annual reset into a continuous system*
- *Reduces strategic friction*
- *Compounds progress without adding staff or disruption*



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