

# Transforming A Trade Association

## Credit Unions



### Overview

This executive summary illustrates how a comprehensive strategic plan empowered a credit union association to face a rapidly evolving industry and changing member expectations. The association sought to enhance its influence, deepen member engagement, and strengthen its value proposition. The resulting plan provided a clear roadmap for growth, advocacy, and innovation, positioning the association for continued success and relevance.

### Background

The association, serving a diverse membership within the financial services sector, recognized the need for a refreshed strategic direction. The industry was experiencing rapid changes driven by technological advancements, regulatory shifts, and evolving member expectations. To remain a vital resource and effective advocate, the association required a clear and actionable plan to guide its future. The goals were to focus on: membership growth, addressing competitive forces, ensuring relevance of member services, and scaling the Association's infrastructure to allow for continued growth and increased capacity.

### Challenge

The core challenge was strategic adaptation in a dynamic environment. The association needed to proactively evolve beyond its current practices to continue effectively serving its members. This involved navigating technological disruption, responding to regulatory changes, and meeting the evolving demands of a diverse membership to enhance its influence, member engagement, and overall value proposition.

## SOLUTION

The Curtis Strategy project team worked with the association's board of directors and leadership team to develop a strategic plan that will guide the association to achieve significant results by: aligning resources for maximum efficiency, increasing member engagement and satisfaction through targeted strategies, strengthening advocacy and industry leadership, innovating member value with enhanced resources, and driving sustainable growth and expansion.



### Conclusion

This case study demonstrates the transformative power of strategic planning for trade associations. By adopting a proactive and member-centric approach, the association developed a comprehensive roadmap for the future. This plan provides a framework for informed decision-making, effective resource allocation, and continuous improvement, ensuring the association's continued success and relevance in the dynamic financial services landscape.