



ON THE MARK  
STRATEGIES

# The Three Problems Killing Your Credit Union or Community Bank

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Your Pathway to Growth Checklist



“You guys have been fantastic partners! I am so very grateful for you and your team! You have led us well! You showed us and taught us things we did not see, realize or even know! You have put us on a path to really understand the importance of our brand – and I am hopeful we live it out better today than we did before we met you guys!”

**Michelle Small | CEO | Kelly Community FCU | \$154 million assets**



It's easy to read about **strategic, marketing and people problems** at financial institutions, but it's often hard to see them right under our noses. That's why we developed this handy checklist to help you out!

Any items you need to mark off indicate a problem killing your institution right now. But don't worry...you'll see what's available to help you at the end of each section.

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## YOUR PATHWAY TO GROWTH CHECKLIST:

### STRATEGY



- Your strategic plan has more than five initiatives
- You don't devote at least 10 minutes to strategy a day
- Your last real planning session was several years ago
- You always run your own planning sessions
- Your strategic goals are not measurable

Are most of your checkmarks in the strategy section? Start with a **strategic planning session!**

### MARKETING



- You're cutting your marketing budget
- Your imagery doesn't reflect your target niches
- You rarely post to social media
- You have too much copy
- You're not using video

Are you making marketing mistakes? **Perform a marketing assessment** to start fixing these issues!

### PEOPLE



- You have high staff turnover
- You don't have anyone ready to lead after you're gone
- Employees seem apathetic or frustrated
- Your journey map doesn't translate into the consumer experience
- No one knows your vision, mission or values

Do you have some serious people problems? A **Working Genius Productivity Assessment** can point you in the right direction when it comes to thriving staff.

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You don't need to just watch as these problems kill your credit union or community bank. Grab onto a lifeline when you **book a free consultation with On The Mark Strategies today.**