

Bringing Your Strategy to Life

COLM O'GRADY PARTNER RBK

CIARA KELLY MANAGING DIRECTOR FUTURENEERZ



Purpose of today





CU: Bringing your Strategy to Life!

Agenda

- 1. Setting the Scene
- 2. RBK Journey To Date
- 3. Credit Unions How it can be applied to your own Strategic Framework
- 4. Q&A





Colm O'Grady

- Partner Audit & Business Advisory
- RBK Strategy & Culture Partner
- ☐ Credit Union Strategy role Facilitator/Mentor

RBK

-FUTURENEERZ



We are CHANGE CATALYSTS, pioneering a THRIVING WORKPLACE MOVEMENT, creating a **BETTER TOMORROW** TODAY.



FUTURENEERZ

< FUTURE LEADER PIONEERS >





Case Study

RBK Strategic Plan and Culture Renovation Programme





Reality Check

- Felt disconnected after Covid
- Managers overwhelmed and struggling to motivate and engage their teams
- Depts inward focused, working independently
- Lack of clarity on our vision and where we were going

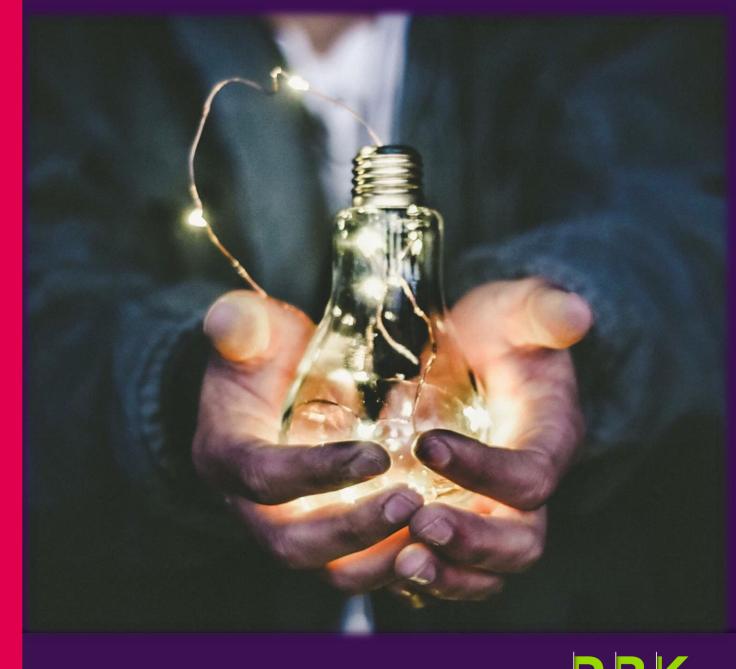


THE PROCESS

A THREE PHASED APPROACH

- Phase 1: Coaching Programme for Managers - Owning Your Power & Edge as a leader
- Phase 2: Defining the RBK Strategic Framework & Leading Your Team
- Phase 3: Operationalising the RBK WHY, WHAT & HOW

With the purpose to increase self-awareness, engagement, and communication amongst the Managers and Partners while bringing alignment and clarity of purpose through a defined RBK WHY, WHAT & HOW.







Strategic Plan Playbook

Our WHY, WHAT & HOW



STRATEGIC FRAMEWORK GOLDEN CIRCLE

Why?

Why does RBK exist? What is the purpose of RBK?

What?

What are the key strategic priorities / pillars? What does success look like by Dec 2025?

How?

How should you behave as a Team/Company? What are the values & behaviours, ways of working? What are the behaviours behind each of our values?



RBK WHY

We are a **PEOPLE FIRST** Professional Services Firm, bringing dynamic solutions and joined up service, where our people, clients, communities, & our business THRIVE!



Our Strategic Framework

OUR WHY

TEAM PURPOSE

We are a **PEOPLE FIRST** Professional Services Firm, **delivering dynamic solutions and joined up service** where **our people, clients, communities and our business THRIVE!**

OUR WHAT

STRATEGIC PILLARS

WHAT DOES SUCCESS LOOK LIKE BY DEC 2025? RBK IS BUILDING THE FIRM OF THE FUTURE

RBK is a profitable national business, funding GROWTH, INVESTMENT, INNOVATION, so we are a sustainable business fit for the future WE ARE ONE UNITED THRIVING RBK TEAM

We are ONE UNITED
THRIVING RBK TEAM with
clear aligned strategy,
structure & systems where
everyone is doing their best
work & thriving

WE HAVE CLEAR STRUCTURE & PROCESSES

We have a clear Structure. Processes & Procedures where the RIGHT PEOPLE are doing the RIGHT JOBS. VALUE ADD CLIENTS SERVICE

RBK is a National Firm of Choice - where our Clients trust RBK to bring dynamic solutions and a joined-up service to their business. RBK IS A GREAT PLACE
TO WORK

RBK to be recognised as a Great Place to Work (attracting, recruiting, developing, & retaining top talent) and a Genuine Employer of Choice

OBJECTIVES

OUR HOW

PUTTING PEOPLE FIRST

We PUT PEOPLE FIRST and consistently treat everyone fairly, with respect, integrity and trust.

MAKING A POSITIVE DIFFERENCE

We MAKE A POSITIVE DIFFERENCE by giving back to our clients and communities.

WE'RE IN IT TOGETHER

WE'RE IN IT TOGETHER to achieve a clear end goal by collaborating and having each other's back.

CLEAR AND CONCISE

We keep it CLEAR AND CONCISE to avoid confusion and bring clarity, purpose & prioritization for everyone.

STEP IN & OWN IT with EXCELLENCE

We STEP IN &OWN IT with EXCELLENCE by taking responsibility & ownership for achieving better outcomes & results.



VIDEO



THE WINS

RBK IS A ONE UNITED THRIVING TEAM

#STEPPINGIN&OWNINGIT

- > Clarity on Why, What & How
- ➤ **Belief** cascaded across the business
- Staff pulse surveys showing increased employee engagement and motivation
- Appraisal Completions aligned to the RBK Strategic Framework
- > Staff Turnover (Attrition) is down
- Huge increase in positivity, can do attitude and straight talking
- > Saying a great time to be working in RBK
- Depts. Firm focused and working better together, alignment in service delivery
- Financials Productivity up, and exceeding our targets
- 29 defined projects, with clear project briefs and project leads



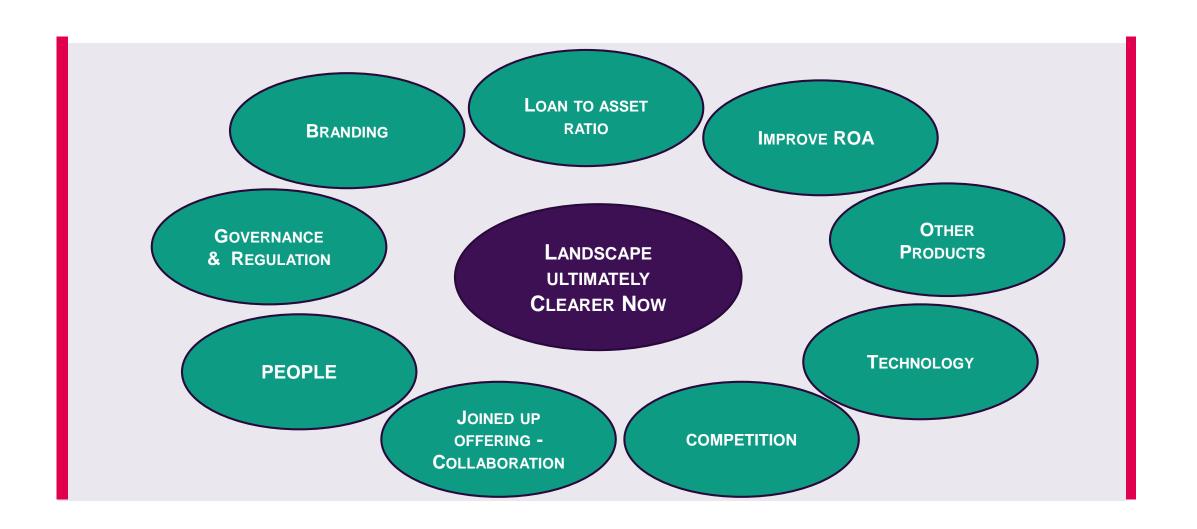


OUR Credit Union REALITY CHECK

OUR HERE AND NOW

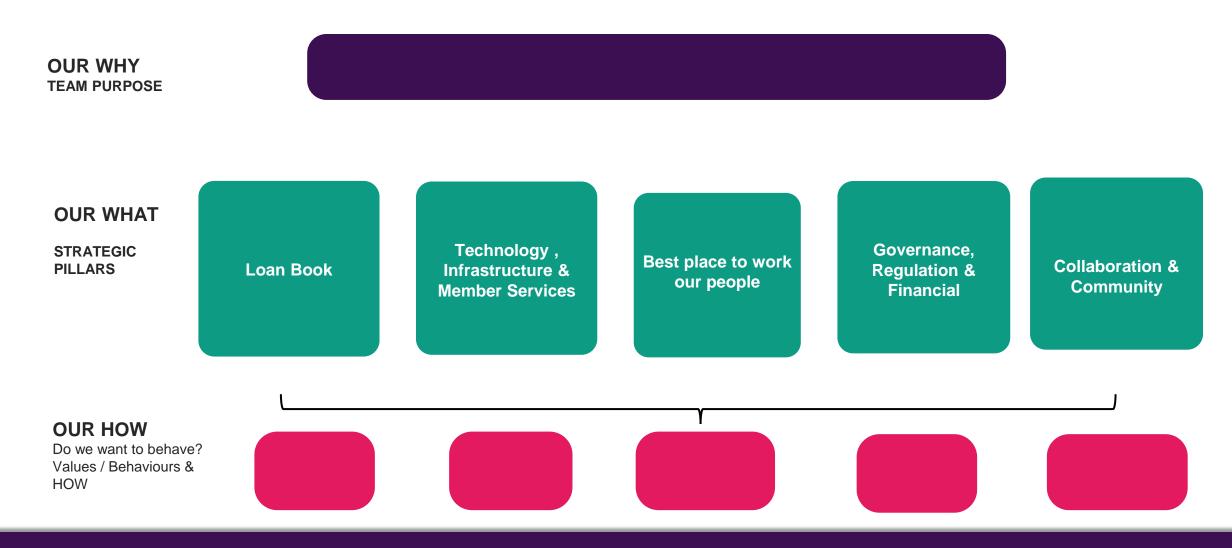


Credit Union Sector Reality Check





CU STRATEGIC FRAMEWORK





THE WHY

The WHY Statement should be

- simple and clear
- actionable
- focused on how you'll contribute to others, and
- expressed in affirmative language that resonates with you

WHO WE ARE CONTRIBUTION IMPACT WHAT'S THE IMPACT OF OUR CONTRIBUTION? WE ARE _____ BRINGING ____ SO THAT ____.

The first blank represents who we are. The second blank represents what is your contribution — the contribution you make to the lives others through your WHY. And the third blank represents the *impact* of your contribution.



How to Get Your Strategic Plan off the Page

- Old Approach
 - Strategic Plan getting a Quarterly Review
 - Parallel to way Business being ran
- New Approach
 - Front & Centre of Everything you do
 - Strategic Plan off the page



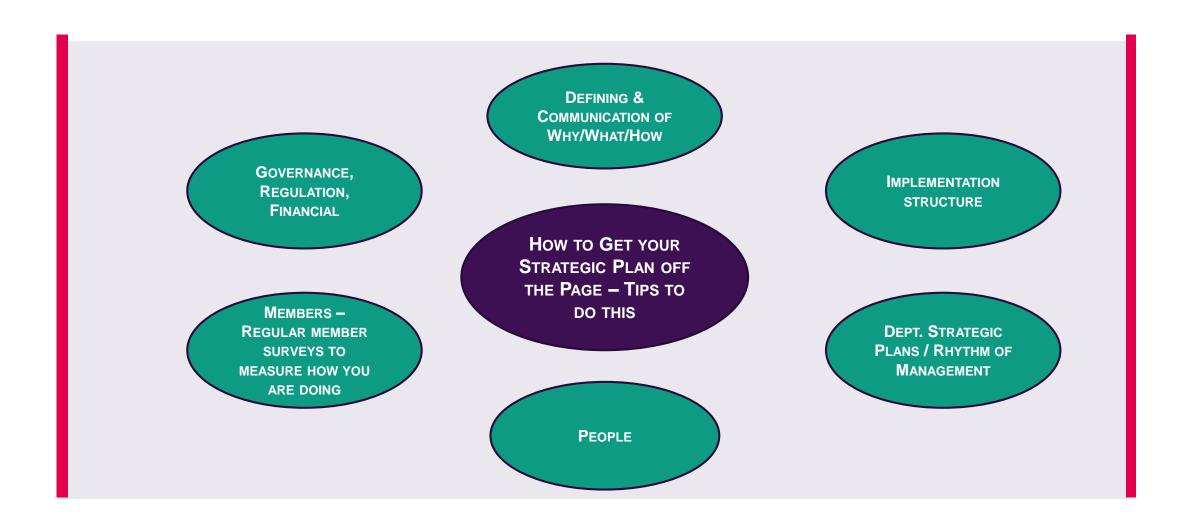
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You do not rise to the level of your goals. You fall to the level of your systems.

JAMES CLEAR
Atomic Habits



How to Get Your Strategic Plan off the Page – Tips to do this





How We Could Help Credit Unions

- 1. Wanted to share the journey we are on key message there is a better strategy framework
- 2. Reality check
- 3. Simplify get clarity on your WHY/WHAT/HOW
- 4. Get it off the page embedded in to your day to day operations all aligned not something to take down a few times a year
- 5. Coaching/Mentoring mentality
- 6. How we can help





Questions?





Thank you







www.rbk.ie

Name COLM O'GRADY
Title PARTNER
T: +353 9064 80600
E: cogrady@rbk.ie

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