



Creating An Innovation Mindset In A Disruptive World



October 20, 2020

Can You Hear Me?

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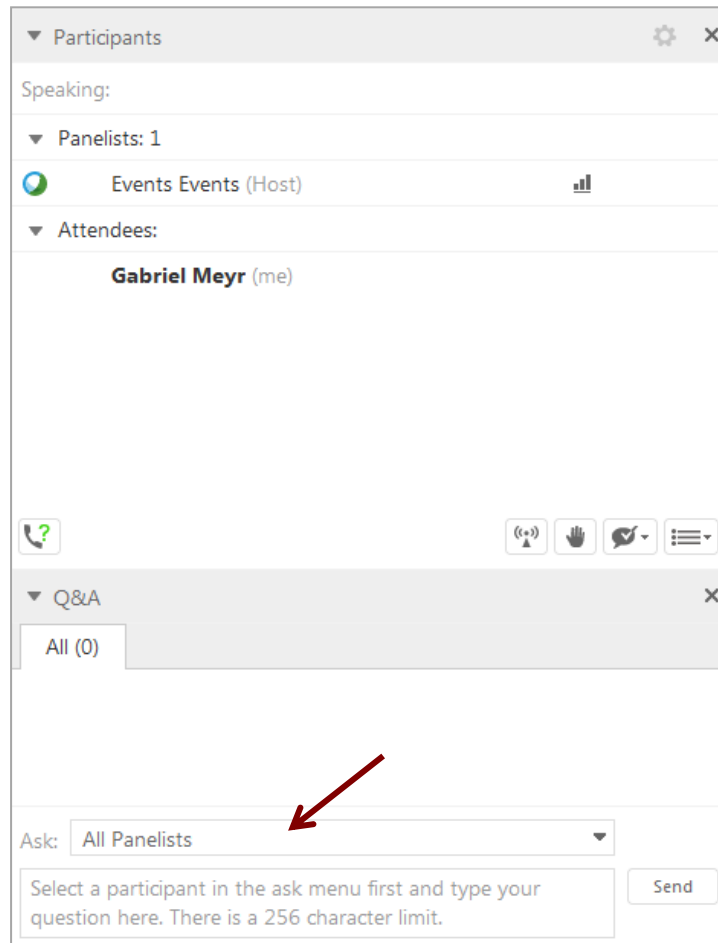
Dial: +1 (415) 655-0003

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Slide Link

Today's slides can be found online at:
<http://bit.ly/2020-10-20-Callahan-Filene>

We Encourage Questions



Use the

Questions Box

located on the right side of the screen, to type your comments or questions.

Tell us what you think!



Please take our post event survey, we value your feedback!



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Today's Hosts

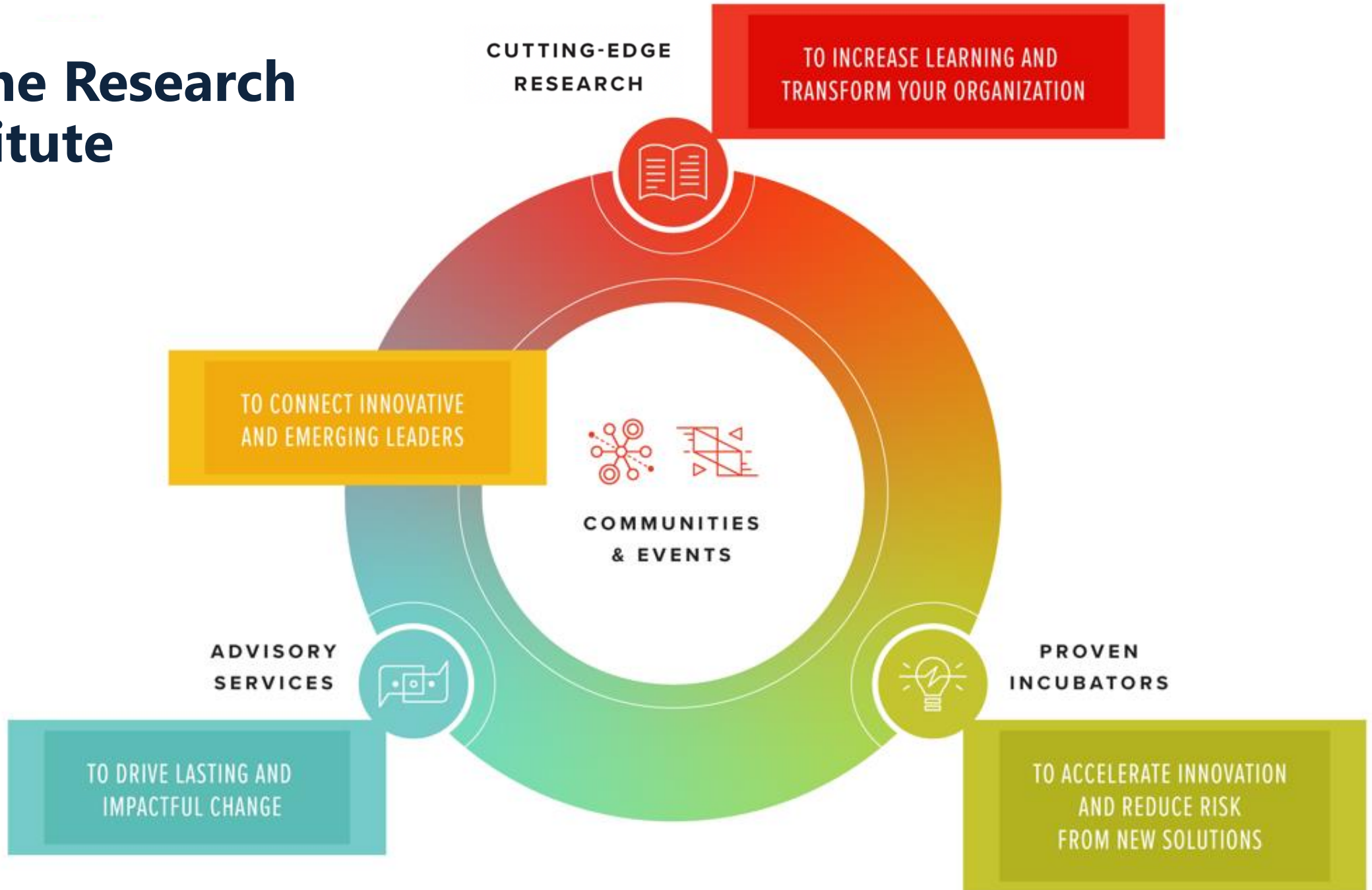


Erin Coleman
Sr. Director, Advisory Services
Filene Research Institute



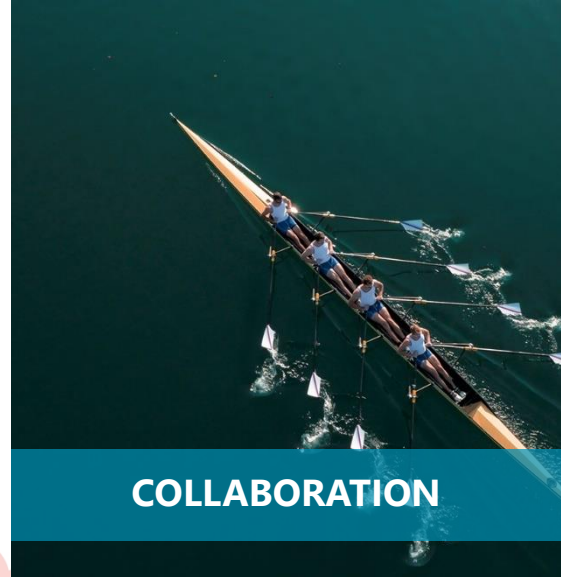
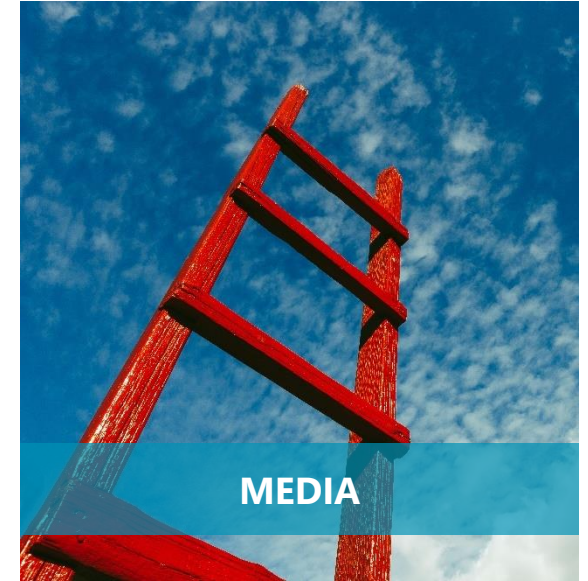
Jay Johnson
Chief Collaboration Officer
Callahan & Associates

Filene Research Institute



Callahan & Associates

Credit unions are in our DNA. Our company was founded to serve the credit union industry.



Today's Agenda

What We Are Hearing In The Market

Filene and Callahan Partnership

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What Is Your Credit Union's Outlook For 2021?

Positive

We see numerous opportunities

Cautious

Too many variables on the horizon

Concerned

We have significant challenges ahead of us



What We're Hearing From The Market

- Continued focus on long-term strategic objectives
- Renewed relevance of financial well-being
- Caring for employees, take care of members
- New partnership opportunities - Merger readiness.
- Momentum around Diversity, Equity, Inclusion (DEI)

Our Partnership: “Two Eds are Better than One”

- More than 65 years of combined experience and focus on the credit union industry
- Knowledge, tools, and insights that help credit unions succeed
- Extensive facilitation experience throughout the cooperative industry
- Innovation expertise
 - the Filene Method and *Disruptive Strategy with Clayton Christensen*

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How The Program Works

1. Confirm program participants
2. *Disruptive Strategy with Clayton Christensen* facilitated by Callahan & Associates
 - in collaboration with Harvard Business School Online.
 - 5-module course centered around growth, strategy, and innovation
3. *The Filene Method* facilitated by Filene Research Institute
 - An actionable innovation framework created by and for for credit unions



Disruptive Strategy With Clayton Christensen In collaboration with Harvard Business School Online.



Together: a new language for focusing on long-term strategic outcomes and the innovation frameworks needed to deliver long-term member impact



The Filene Method created by and for credit unions and the activation of innovation mindset.



This program is designed to help credit unions dive deep into **the process behind research, strategy and innovation** while creating actionable, impactful, and long-lasting member outcomes.

The Filene Method: Making Innovation Real

1. Gather Insights
2. Develop Empathy
3. Identify the Problem
4. Ideate Solutions
5. Prototype and Test on Idea
6. Report what you've Learned



Hear



Create



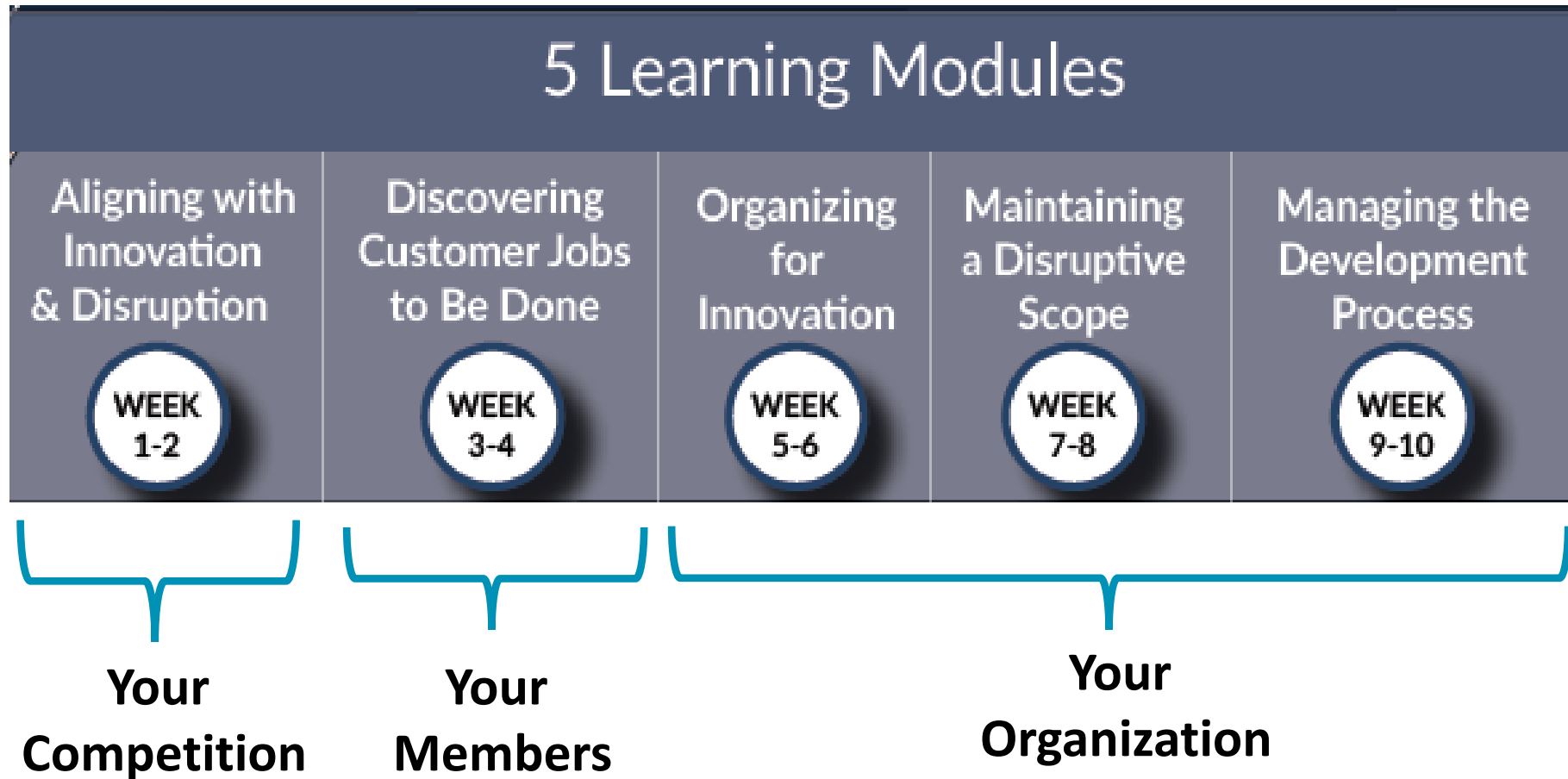
Deliver



Disruptive Strategy with Clayton Christensen

- Learn new tools to meet the strategic challenges in a disruptive world
- Build a practical strategic framework for applying and managing these tools
- Learn a common language focused on strategy
- Use real issues to practice what you learn
- Do this together, learning the same things at the same time, and hit the ground running

Approachable, Manageable, Actionable



Program Outcomes

A new language

- focus on long-term strategic outcomes
- innovation frameworks to deliver lasting member impact

New actionable skills

- avoid disruption
- create new growth opportunities
- understand challenges and create solutions

New ideas and techniques

- based on member and employee needs
- hands-on innovation tools that can be used immediately
- prototype and testing methods that bring innovation to life



Disruptive Strategy at Work: Strategic Planning



The Filene Method at Work: Innovation with Impact



SavvyMoney®



Remotary



THANK YOU

Q&A