OMNIA EXEC EXECUTIVE FORUM DEBRIEF

Omnia Exec

Conference Highlights: Essential 2026 Strategic Priorities for Credit Unions

Fresh Insights from CU Leadership Convention and America's Credit Unions Strategic Growth Conference

August 28, 2025 ✦ Presented by Dohnia Dorman, CEO/Founder, Omnia Exec LLC

Key Insights Presented

Of the seven conference themes – Agility & Adaptability, Strategic Alignment & Focus, Collaboration & Partnerships, Leadership Development, Succession & Diversity, Digital Transformation & Data-Driven Decision-Making, Risk Management & Fraud, and Member-Centric Growth – the Executive Forum focused on the three themes that Dohnia coined ***strategic growth accelerators***.

01. Agility and Adaptability for Growth

- Highlighted the need for operational agility, speed in decision-making, and strategic prioritization.
- Emphasized the importance of middle management in executing strategy and reducing friction points, while also noting the necessity of saying "no" to prioritize essential initiatives.

02. Strategic Alignment and Organizational Focus

- Emphasized the need for all organizational facets to be synchronized, similar to sheet music for musicians or coordinated rowing.
- Highlighted the importance of cultural and leadership alignment, data integrity, and clear priorities to ensure effective execution.
- Conference presenters stressed the significance of strategic focus and discipline in project management.

03. Enhancing Collaboration for Organizational Growth

- Discussed the importance of internal and community collaboration plus external partnerships.
- Emphasized the need for strategic thinking around collaboration, including cross-functional teamwork, knowledge sharing, and selecting appropriate Fintech partners aligned with credit union values.
- Conference presenters stressed involving staff in decision-making and leveraging collaboration as a "superpower" for sustainability.

Collective Intelligence

- Discussed challenges around strategic planning and execution, with one participant calling for discipline in committing to established plans and prioritization and another highlighting issues with executive misalignment regarding timeline expectations and process changes.
- Discussed the importance of communicating the "why" behind organizational decisions to gain buy-in from employees, particularly regarding financial decisions. One participant emphasized the need for better communication with frontline staff about strategic initiatives, while another shared experiences with prioritizing projects using data-driven force ranking.
- Participants discussed how siloed approaches and lack of shared resources can hinder progress, with one leader emphasizing that there must be better cross-functional collaboration.

Forward Momentum

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Sept. 25, 2025 | 2:00 PM ET - 2:50 PM ET

Get the blueprint for planning, budgeting, and implementing an ROI-driven team alignment program that drives 2026 strategic initiative outcomes.

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