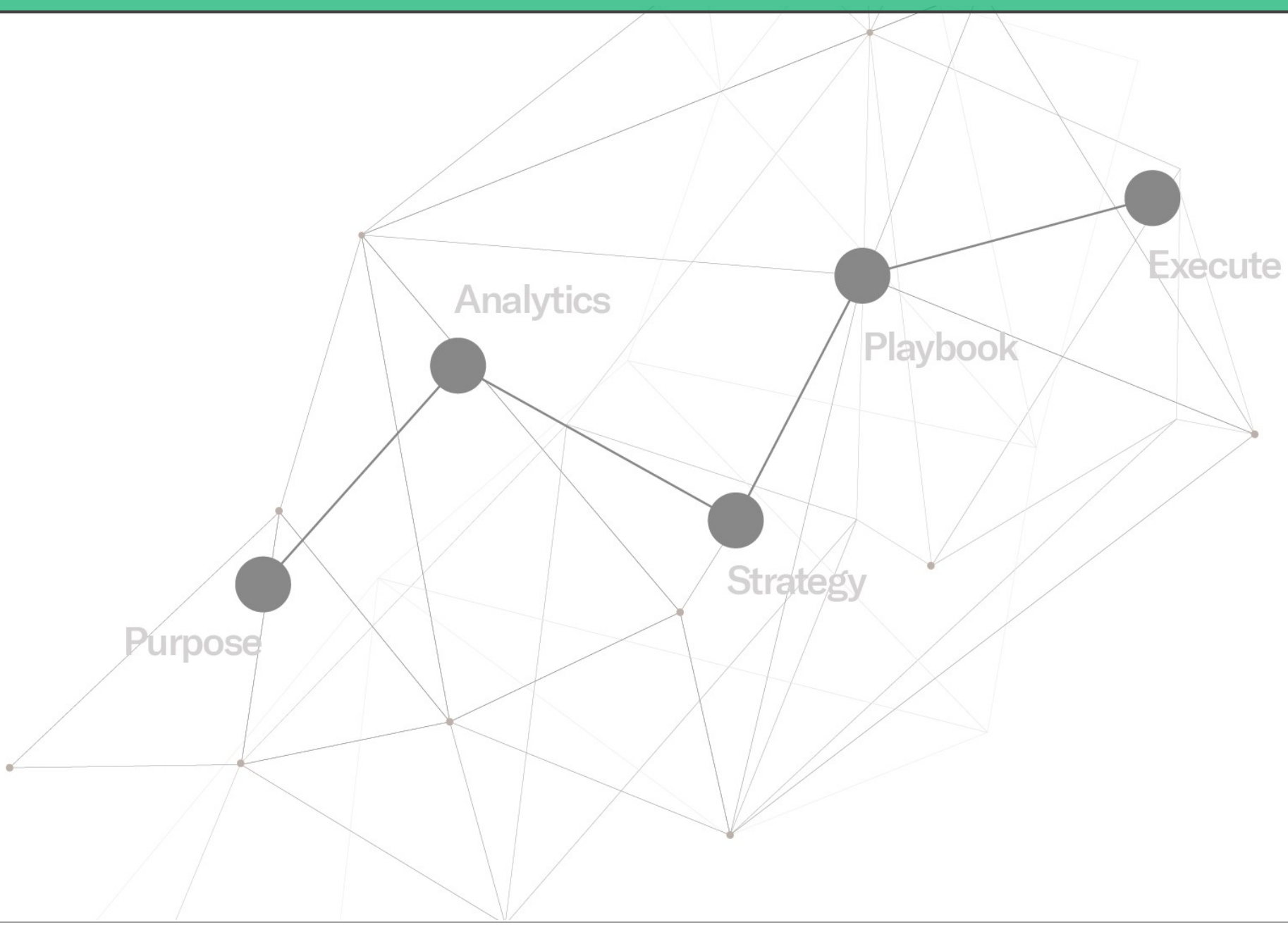
StrategyGPS User's Guide

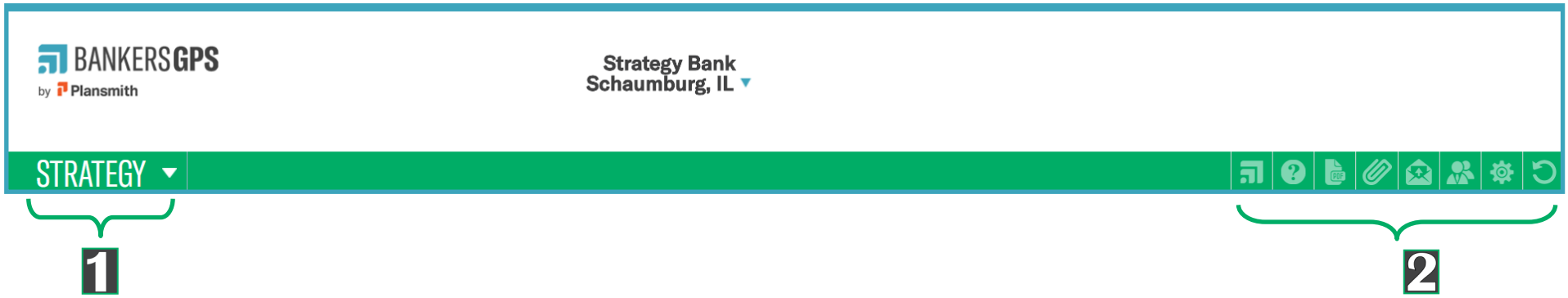


StrategyGPS User's Guide
GETTING STARTED

Congrats on starting your Strategic Planning journey! This quick start guide will give you some tips and tricks to successfully move through the Strategy module of BankersGPS. **For the best user experience, please use the Google Chrome browser while accessing BankersGPS.**

First up?

THE MENUS:



1 The STRATEGY drop down menu is there to help you navigate to any screen within the Strategy module. The 5 sections - *Purpose, Analytics, Strategy, Playbook, Execute* - will be discussed later.

2 Click an icon on the right to access any of these tools:

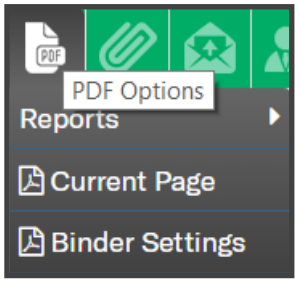
- Modules: Switch to a different module in BankersGPS (*Note: this icon is only visible to users who also subscribe to the Forecast, Competitive, and/or Risk module(s) of BankersGPS)
- Help: A quick link to this User's Guide
- PDF Options: Use this to quickly generate a PDF of any saved binder, print the Current Page, or create a new custom binder (Binder Settings screen)
- Attachments: Upload an external PDF document to your strategic plan
- Feedback: The easiest way to reach Plansmith - send us questions or comments about the system
- Owners: Where you assign owners for your strategic objectives and initiatives
- Settings: Use these options to set a Custom Reporting Period for your Objectives, select your Plan Approval Date, Save a New Plan, or View/Edit the name and description of your existing plans
- Logout: Ends your current BankersGPS session

Next, **ICONS**:

- Initiative In Progress
- Initiative Incomplete & Past Due
- Initiative Completed After Due Date
- Initiative Deadline Approaching
- Initiative Completed On Time
- Initiative Pending/No Start Date Defined
- Notify (Email) an Objective/Initiative Owner
- Reorder Objectives/Initiatives Within a Category

PRINTING:

It's quick and easy to print your strategic plan using the PDF Options in StrategyGPS.



There are two options:

1. Choose 'Current Page' from the PDF options menu to print a single report (e.g. Executive Summary, Banker's Playbook™ Scorecard).

2. Use the Binder Settings option to create custom report packets for your Strategy and Board meetings, then print them anytime with a single click.

To create a new binder, click the Binder Settings option from the PDF Options drop down , click the reports you want to include, click 'Save As' to give your binder a name, then 'Create PDF'.

The next time you need to print an updated report packet, just pick the binder name from the PDF Options/Reports list or the Binder drop down menu on the Binder Settings screen.

GETTING STARTED

Here's what you'll find in the 5 sections of StrategyGPS:

1. **Purpose: Set Your Course**

   Too often, the annual meeting is the only time banks look at their mission, vision, and core values. What if they played an active role every day, and helped improve the bottom line? Defining these core pieces can help you discover your unique strengths, and start using them to compete.

   - Enter your Executive Summary, Mission Statement, Vision Statement and Core Values here

2. **Analytics: Assess Your Position**

   You have a sense for your bank's strengths and vulnerabilities, but specifically, how do they affect your performance? Define them and analyze their effect. Powerful market analytics can uncover opportunities you might not have realized, and help you position your bank to perform.

   - Market Analytics, Competitive Analysis, SWOT

3. **Strategy: Focus**

   You know what works. What's exciting now is that you have data to formulate a strategy, assess your appetite for risk, and set objectives. A sound strategy will not only make you a stronger bank. It will leave competitors wondering how you did it.

   - Objectives

4. **Playbook: Set the Pace**

   With your strategy in place, you're ready to put it into motion. In this stage, you'll create a playbook that sets the pace for closing the gap between your bank's current position and its strategic goals.

   - Banker's Playbook™, Risk Tolerance

5. **Execute: Track, Adjust and Perform**

   The plans are in place, the strategy is set, and you are executing your playbook. But you're not done yet. Now, actively track results against your targets – and against your peers. If adjustments are needed, you'll be able to pivot as you go and keep your plan on course. You're getting things done, seeing results, and the data shows that your bank is moving toward your goals.

   - Track Results, Dashboard

GETTING STARTED

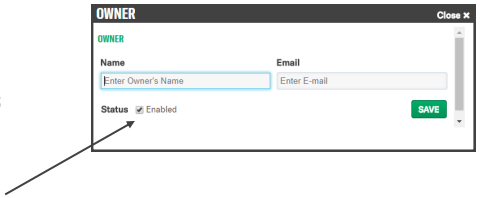
Ok, let's go!

First things first, you will want to create one or more *Owners*.

Owners are individuals involved in your bank's strategic planning process. Anyone who will be assigned ownership - i.e. accountability - for any strategic objectives or initiatives you develop along the way is an Owner. You may enable or disable an Owner's access at any time.

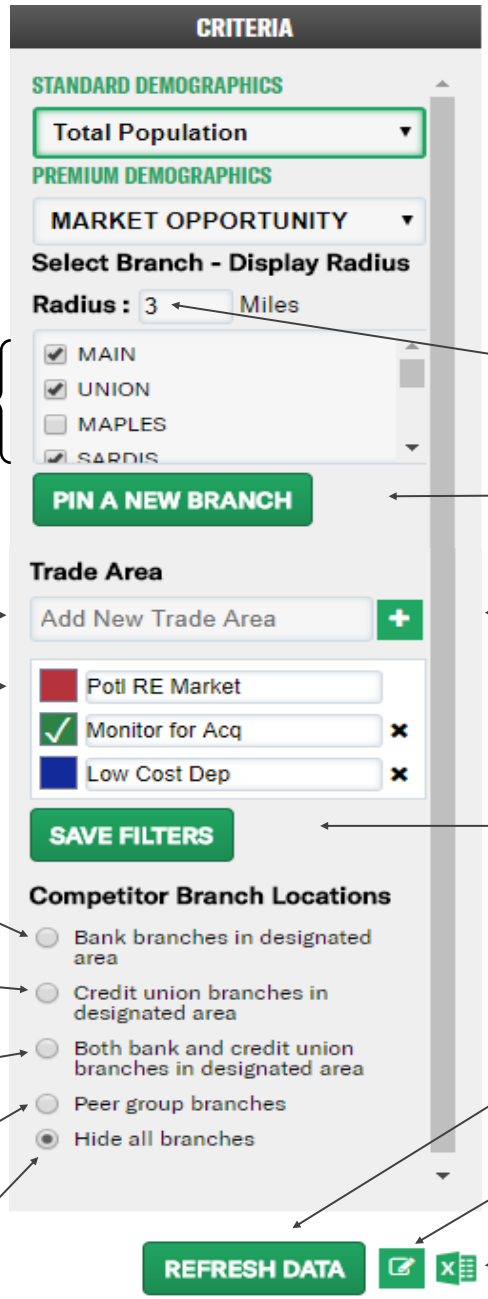
To add a new Owner:

- Click the people icon in the green menu bar at the top of any screen
- Click the + button
- Add the Owner's name and email address
- Click Save when you're done
- To disable an Owner's access, uncheck this box



The next few pages outline the 5 sections of StrategyGPS. If you have questions about any of these sections or how they work, please contact us at 800-323-3281, support@bankersgps.com, or use the 'Feedback' button in the system to send us your comments.

ANALYTICS: ASSESS YOUR POSITION



Use this drop down to view standard demographics

Use this drop down to view Premium Demographics (*additional subscription required. Contact us for details!)

Select/deselect the branches you want displayed with a radius and within the Demographics Data table

Set a desired radius around your branches

Pin a custom branch in a proposed trade area

Name your custom trade area

Click the "+" to create a custom trade area

Check or uncheck the colored box to display or hide a trade area on the map and in the Demographics Data table

Save your current settings

Include competitive bank branches in your target trade area

Include competitive CU branches in your target trade area

Include both competitive bank and CU branches in your target trade area

Include branches of competitors/peers previously selected in the Competitive module

Display only your branches

Refresh the data in the Demographic Data table below

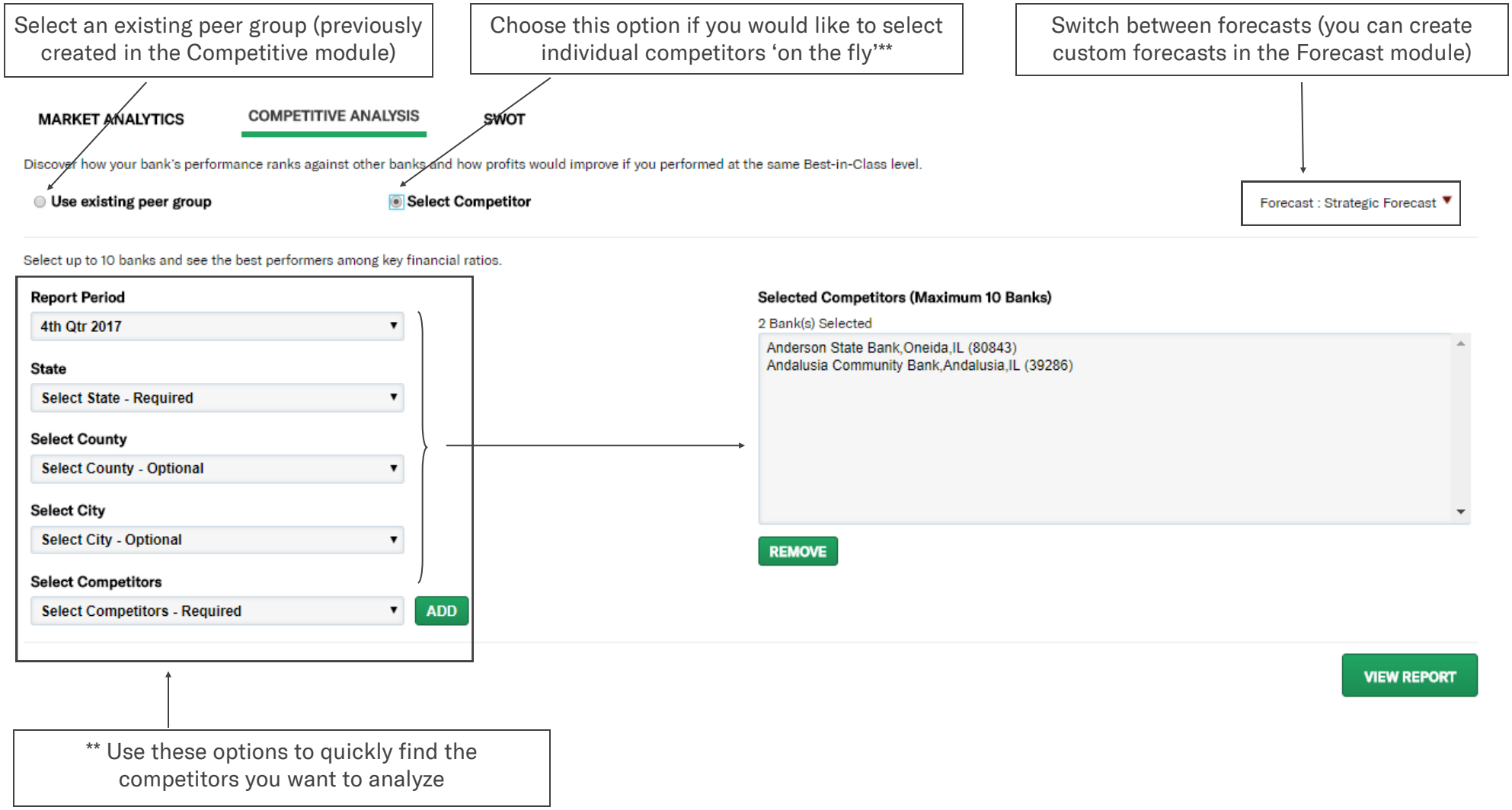
Add narrative about your market analysis (e.g. findings, discussions, plans)

Export the Demographic Data to Excel

StrategyGPS User's Guide

ANALYTICS: ASSESS YOUR POSITION

Create a Best-in-Class report that compares your bank to competitors or a peer group.
For a complete peer analysis, switch to the Competitive module.

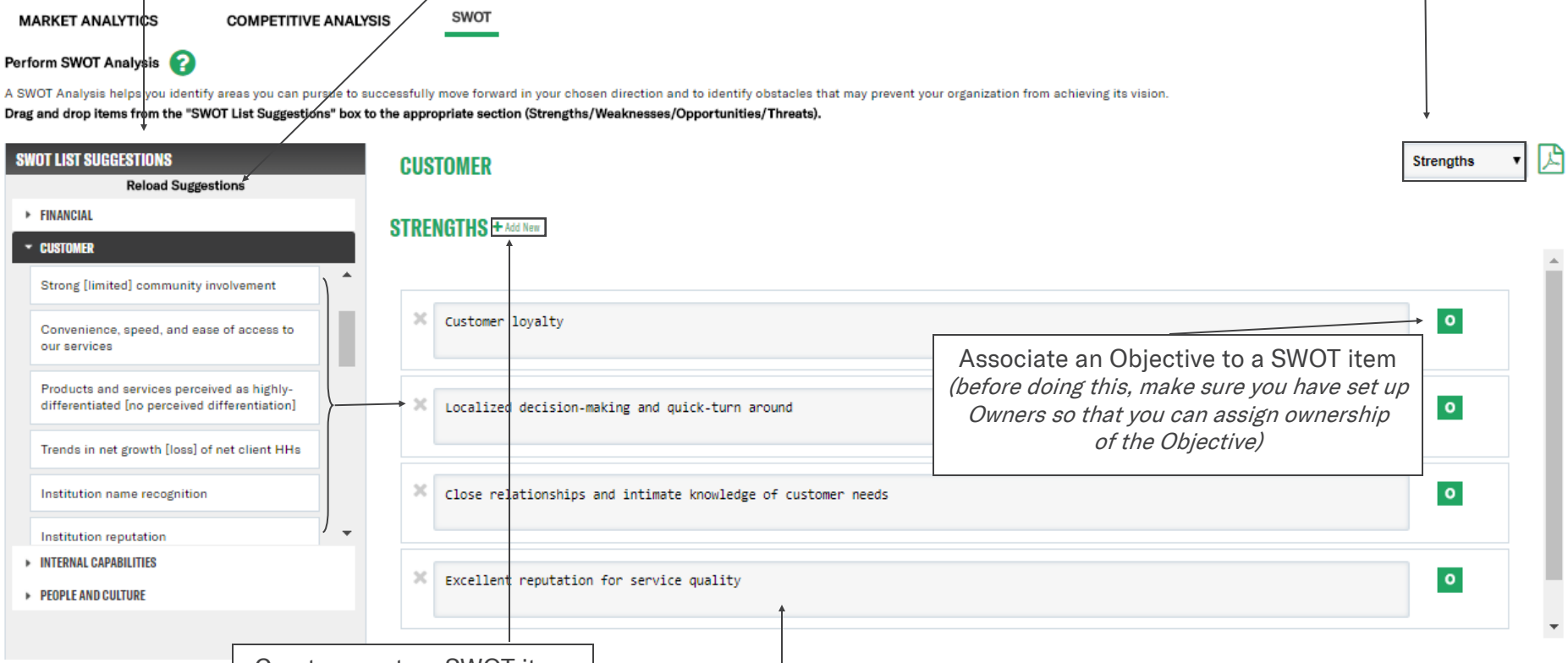


ANALYTICS: ASSESS YOUR POSITION

SWOT List Suggestions to help spur ideas for your own SWOT items. Once dragged from the Suggestion List to the SWOT container, these are completely customizable.

Click to Reload the Suggestion List for a full listing of the default items in each category

Switch between Strengths, Weaknesses, Opportunities, and Threats



Associate an Objective to a SWOT item *(before doing this, make sure you have set up Owners so that you can assign ownership of the Objective)*

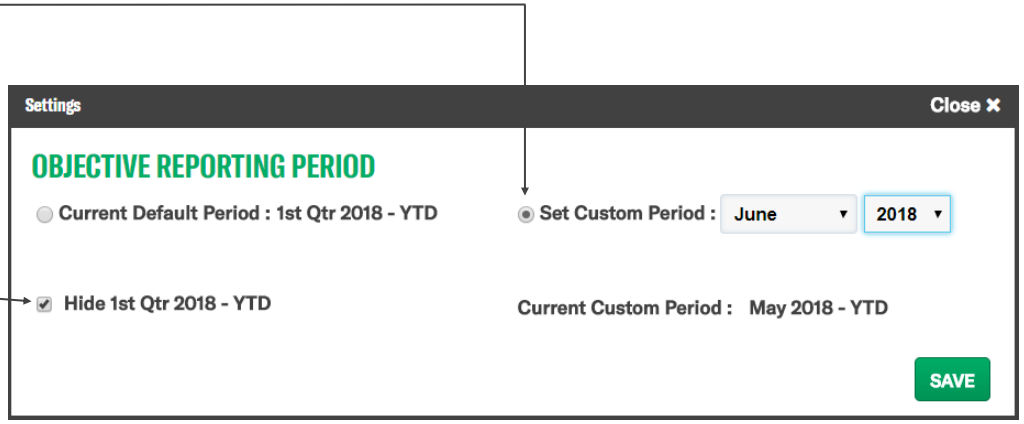
Create a custom SWOT item

TIP: SWOT items can be reordered once added to the SWOT container. To do this, hover over the item and drag it once the cursor turns to a 4-way arrow

Setting **CUSTOM REPORT PERIODS**:

To customize your report period, hover over the Settings option in the main menu then select "Set Objective Reporting Period".

1. Click the radio button next to "Set Custom Period"
2. Choose the month and year from the drop downs
3. Click Save
4. To hide the current quarter-YTD data and only display your custom period, check this box before saving your new Settings. Uncheck the box to display the current data alongside your custom period.



Changing the Objective Reporting Period will display your reports in one of three ways:

* *Custom Period Only*

Objective	Owner	Measure	YE 2017	May 2018-YTD	Proj 2018	Target - YE 2018	Target - YE 2019	Target - YE 2020	Notify	Action	Last Modified

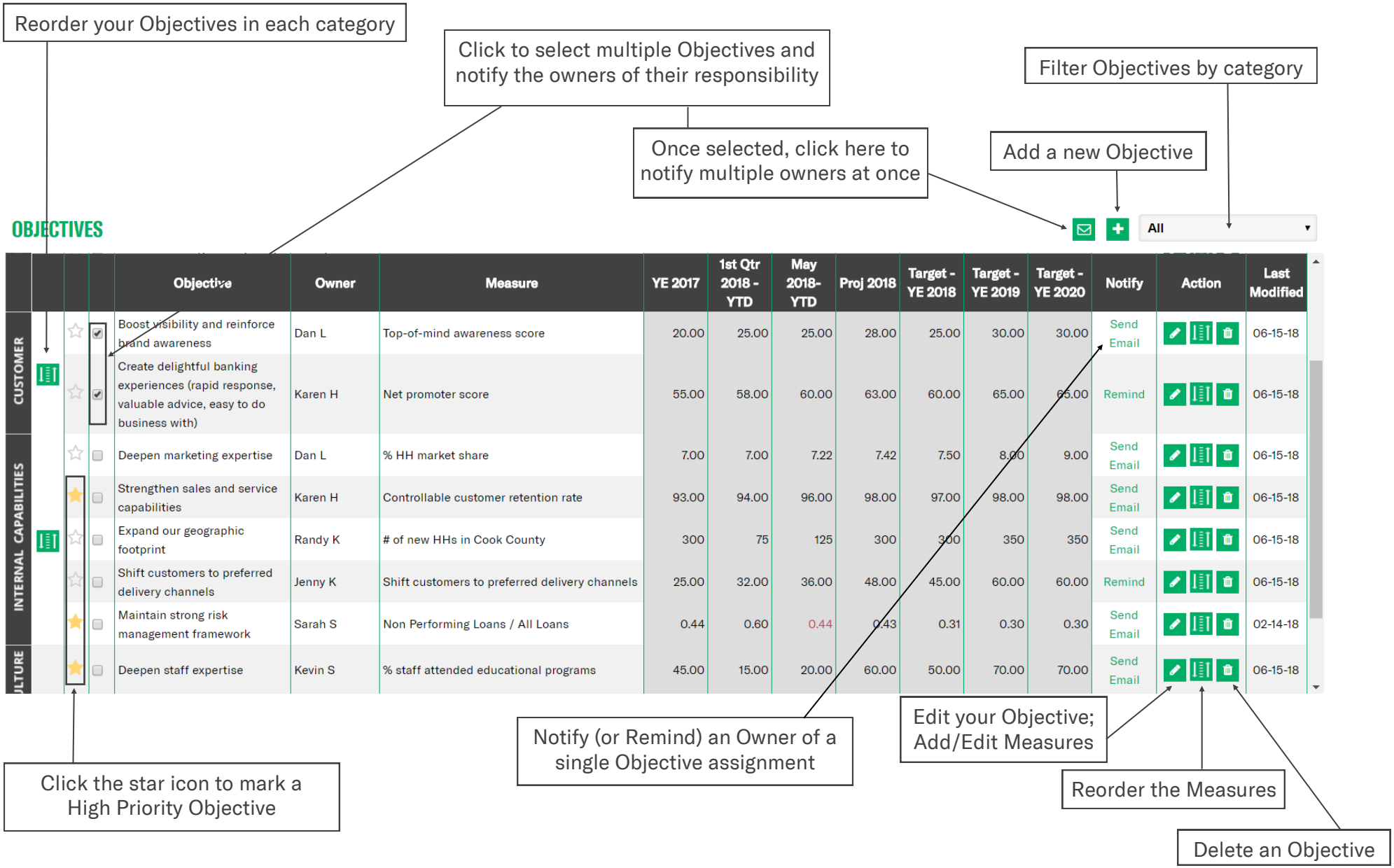
* *Custom Period Alongside Default Period*

Objective	Owner	Measure	YE 2017	1st Qtr 2018 - YTD	May 2018-YTD	Proj 2018	Target - YE 2018	Target - YE 2019	Target - YE 2020	Notify	Action	Last Modified

* *Default Period Only*

Objective	Owner	Measure	YE 2017	1st Qtr 2018 - YTD	Proj 2018	Target - YE 2018	Target - YE 2019	Target - YE 2020	Notify	Action	Last Modified

STRATEGY: FOCUS



	Objective	Owner	Measure	YE 2017	1st Qtr 2018 - YTD	May 2018- YTD	Proj 2018	Target - YE 2018	Target - YE 2019	Target - YE 2020	Notify	Action	Last Modified
CUSTOMER	Boost visibility and reinforce brand awareness	Dan L	Top-of-mind awareness score	20.00	25.00	25.00	28.00	25.00	30.00	30.00	Send Email		06-15-18
	Create delightful banking experiences (rapid response, valuable advice, easy to do business with)	Karen H	Net promoter score	55.00	58.00	60.00	63.00	60.00	65.00	65.00	Remind		06-15-18
INTERNAL CAPABILITIES	Deepen marketing expertise	Dan L	% HH market share	7.00	7.00	7.22	7.42	7.50	8.00	9.00	Send Email		06-15-18
	Strengthen sales and service capabilities	Karen H	Controllable customer retention rate	93.00	94.00	96.00	98.00	97.00	98.00	98.00	Send Email		06-15-18
	Expand our geographic footprint	Randy K	# of new HHs in Cook County	300	75	125	300	300	350	350	Send Email		06-15-18
	Shift customers to preferred delivery channels	Jenny K	Shift customers to preferred delivery channels	25.00	32.00	36.00	48.00	45.00	60.00	60.00	Remind		06-15-18
	Maintain strong risk management framework	Sarah S	Non Performing Loans / All Loans	0.44	0.60	0.44	0.43	0.31	0.30	0.30	Send Email		02-14-18
ULTURE	Deepen staff expertise	Kevin S	% staff attended educational programs	45.00	15.00	20.00	60.00	50.00	70.00	70.00	Send Email		06-15-18

PLAYBOOK: SET THE PACE

Reorder your Initiatives

Once you have added an Initiative, "Send Email" to notify the owner. *Note: you must notify the Objective owner before alerting the Initiative owner.*

Select the Initiatives you want to view or hide in your Playbook report.

BANKER'S PLAYBOOK™ RISK TOLERANCE

BANKER'S PLAYBOOK ™

Show All

Category	Owner	Objective	Measure	YE 2017	1st Qtr 2018 - YTD	May 2018- YTD	Proj 2018	Target - YE 2018	Target - YE 2019	Target - YE 2020	Last Modified	Add
Internal	Randy K	Expand our geographic footprint	# of new HHs in Cook County	300	75	125	300	300	350	350	06-15-18	+

Initiative	Owner	Start Date | End Date	Percentage	Status	Notes	Notify	Action	Last Modified
Quantify deposit/loan balance potential in prospective markets	Melissa O	04-15-18 | 06-30-18	60%	!	✎	Send Email	✎ 🗑	06-25-18
Model market demand to include competitive and segment data	Melissa O	03-15-18 | 07-15-18	95%	🕒	✎	Send Email	✎ 🗑	06-25-18
Marketing Awareness Campaign	Dan L	11-01-17 | 12-31-17	100%	👍	✎	Send Email	✎ 🗑	06-15-18
Prepare branch distribution proposal for Board approval	Randy K	04-01-18 | 06-30-18	100%	👍	✎	Send Email	✎ 🗑	06-15-18

Internal	Jenny K	Shift customers to preferred delivery channels	Shift customers to preferred delivery channels	25.00	32.00	36.00	48.00	45.00	60.00	60.00	06-15-18	+
Internal	Sarah S	Maintain strong risk management framework	Non Performing Loans / All Loans	0.44	0.60	0.44	0.43	0.31	0.30	0.30	02-14-18	+
People and Culture	Kevin S	Deepen staff expertise	% staff attended educational programs	45.00	15.00	20.00	60.00	50.00	70.00	70.00	06-15-18	+

Percent complete (drag slider to adjust the level of completion)

Add/edit notes about an Initiative

Edit an Initiative (name, owner, start/end date, description)

Add a new Initiative