

# Three P's of Credit Union Integration

At CEO Advisory Group, merger integrations are our core competency. We know how to efficiently execute all of the steps needed to create one fully functional credit union out of two.

Here's a peak at our project plan.

## The People

### Steering Committee

- Comprises executives from both branches, plus an integration expert from CEO Advisory Group.
- Meets bi-weekly to manage the progress of the functional teams.

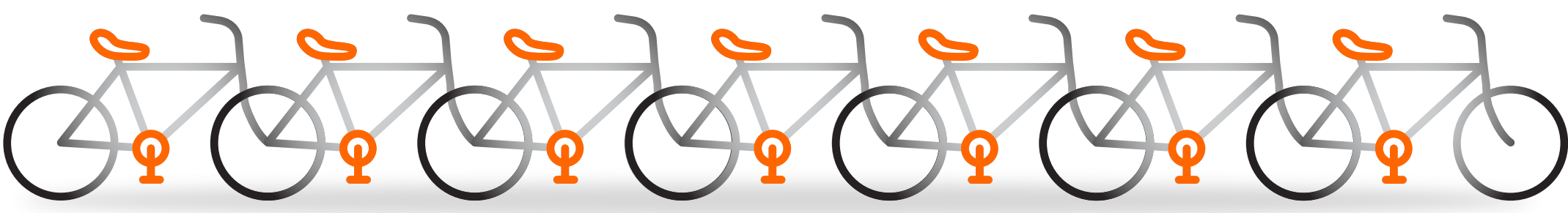
### Functional Teams

- Staff these teams with members of each branch with skillsets to match the objective of the team. Choose team members who support the merger and will stay positive in spirit. CEO Advisory Group's integration expert will also be a part of each team.
- Meets weekly or daily to address the business details of the merger.

- Marketing Communications
- Product
- Lending
- Finance
- Operations
- IT
- HR

## The Process

Each team has a role to play in the merger.



**MarCom** – Manages communications to staff, members and the public.



**Product** – Compares and consolidates products from both branches.



**Lending** – Manages loan portfolio and strategy.



**Finance** – Performs valuations on both branches; consolidates accounting systems.



**Operations** – Plans the functional needs for the new organization.



**IT** – Evaluates existing systems and integrates technologies.

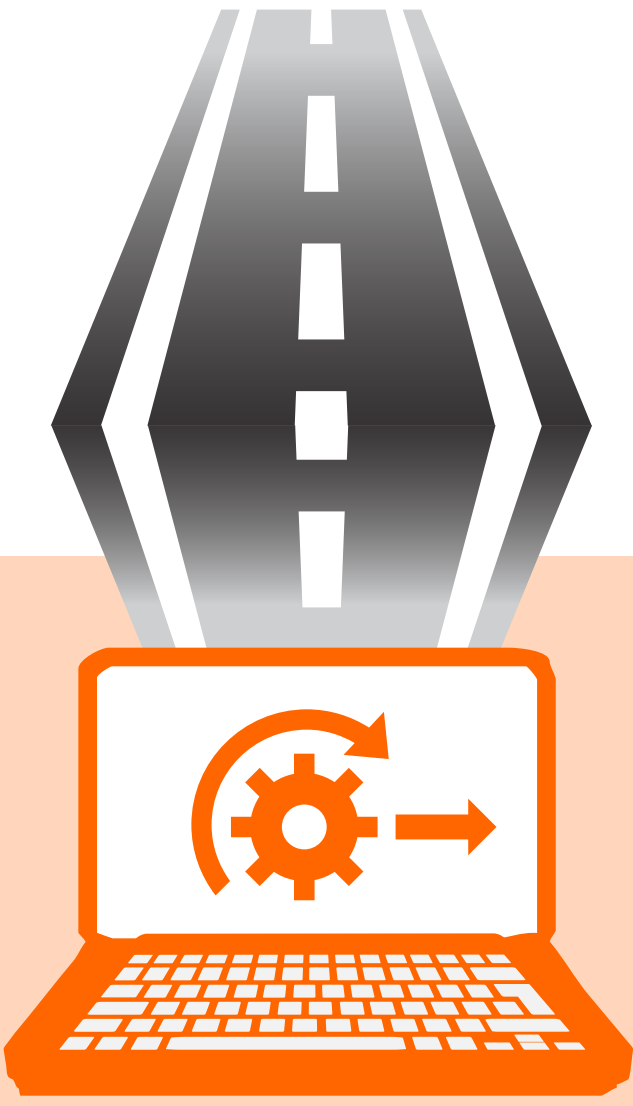


**HR** – Consolidates employee benefits and HR systems; hires staff.

## The Platform

The platform brings it all together.

CEO Advisory Group's proprietary technology platform was designed with mergers in mind and supports the collaboration and secure transfer of important information.



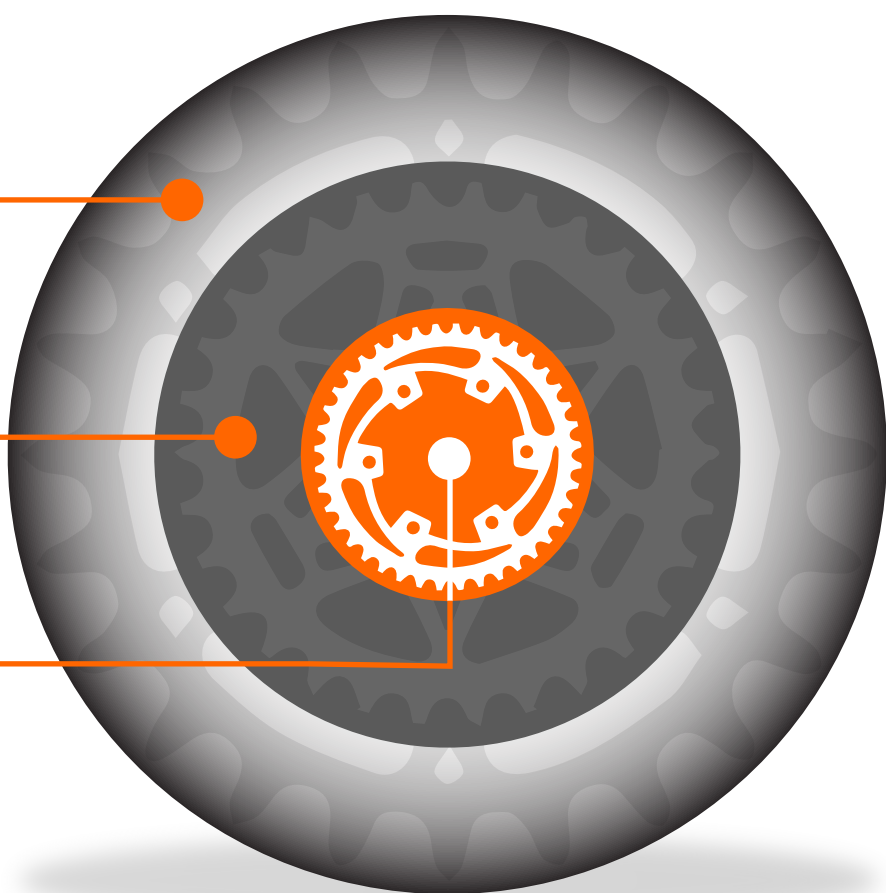
- Project Plan Management
- Timelines, Deadlines, and Tasks
- Secure Document Transfer
- Internal Document Storage (Training Docs)
- Collaboration/Chat



Additionally, CEO Advisory Group's technology platform proactively identifies and alerts team members of risks and missed opportunities.

The People conduct the Process by using the Technology Platform.

People  
Process  
Platform



It all leads to a successful integration.