THE CREDIT UNION OUTLOOK

WHAT MUST MOVE OVER THE NEXT **TWELVE MONTHS**

Featuring **Pete Hilger,** CEO, Allied Solutions,
and **Tony Hernandez,** President & CEO, DCUC

The Executive Perspective

Credit union leaders face a practical challenge: keeping daily operations moving while preparing the institution for what comes next. That requires a willingness to revisit plans, invest in people, and make decisions that move priorities forward.

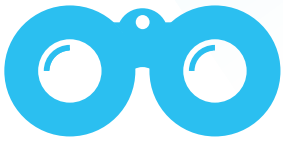
In this *Credit Union Outlook*, Pete Hilger and Tony Hernandez discuss how leadership sets the pace for organizational progress. Their conversation centers on making planning more responsive, assigning clear ownership, and creating the discipline to turn strategic intentions into action.

Make Planning More Responsive

An annual planning session provides direction, but changing conditions may require decisions well before the next scheduled review. Hernandez challenges credit unions to reassess their plans more frequently as new information emerges.

That means recognizing when a market development, member need, or business opportunity warrants bringing leadership together to reconsider priorities. A plan needs enough flexibility to remain useful as circumstances change.

The CEO plays an important role in establishing that approach and helping the board understand why more frequent strategic discussions may be necessary. Keeping leadership and the board aligned can help the institution respond with greater clarity and purpose.



EXECUTIVE TAKEAWAY:
Revisit strategic priorities when conditions change, rather than waiting for the next annual planning cycle.

Give Priorities an Accountable Owner

A strategic priority needs someone responsible for moving it forward. Hilger emphasizes assigning a clear owner and creating accountability throughout the organization.

Ownership also requires investment in the people doing the work. Leaders need to consider whether those responsible have the support, resources, and authority to act. Naming an owner without equipping that person can leave an important initiative stalled.

The CEO establishes expectations, but progress depends on people across the institution understanding their responsibilities and having the ability to fulfill them. Clear ownership can build commitment and give teams a shared sense of direction.

EXECUTIVE TAKEAWAY:
Assign one accountable owner and equip that person to move the priority forward.

Clear Ownership
Who is responsible for moving the initiative forward?

Leadership Support
What resources and decisions does that person need?

Defined Timing
When should the next meaningful milestone occur?

Set a Pace That Supports Progress

Moving quickly through daily tasks does not necessarily mean an institution is advancing its future priorities. Hilger distinguishes between speed in current operations and speed in preparing for tomorrow.

He illustrates that distinction with a concept Allied is exploring: a digitally accessible offering designed around a consumer's changing vehicle needs. The example demonstrates how a broad idea becomes more actionable when leadership commits to a direction and establishes a near-term deadline.

Both leaders emphasize the influence of leadership behavior. Setting expectations, making timely decisions, and allowing room to learn can help teams move beyond prolonged discussion. The goal is to create measurable progress while keeping people focused on the intended outcome.

EXECUTIVE TAKEAWAY:
Set meaningful deadlines and reinforce them through timely decisions and consistent leadership support.

What needs to move next? Name the priority. Assign the owner. Set the milestone.

Put the Conversation to Work

Use these questions to guide your next leadership discussion:

- Which strategic priority needs attention before our next scheduled planning session?
- Does it have an accountable owner with the resources and authority to act?
- What meaningful progress should we expect over the next 60 to 90 days?

Choose one priority that needs greater momentum. Confirm who owns it, identify the decisions or resources required, and establish the next milestone. Use that commitment to connect your longer-term direction with action your team can take now.

Continue the conversation.

Continue exploring these insights with the companion video, "What Must Move Over the Next Twelve Months" featuring Pete Hilger and Tony Hernandez as part of *The Credit Union Outlook* series.

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