



The Informed Banker  
Speaker Series



# Thinking Like A Strategist

October 17, 2019

The content for this presentation was created by Chris Howard  
The views and opinions expressed herein are those of the author, Chris Howard  
and do not necessarily reflect those of Harland Clarke.

# Presenters



**Chris Howard**

Senior Vice President  
Callahan & Associates



*Moderator*

**Christine Ahlgren**

Director of Strategic  
Business Alliances



Culture eats strategy for breakfast.

– Peter Drucker

# Strategy

- Long-term, high-level, comprehensive in scope
- Not ways to reach operational, development, or performance goals
- How to think, not what to do
- It's not a weekend in the fall; it's ongoing

Strategy is the alignment...across  
time,  
[scope], and scale...of potentially  
unlimited aspirations with  
necessarily  
limited capabilities.

– John L. Gaddis

**GALLAHAN**  
ASSOCIATES  
*the credit union company*

# Strategy

“As-Is”

**Credit  
Union  
Today**



“To-Be”

**Credit  
Union  
Tomorrow**

The essence of strategy is  
choosing  
what not to do.

– Michael Porter

**CALLAHAN**  
ASSOCIATES  
*the credit union company*

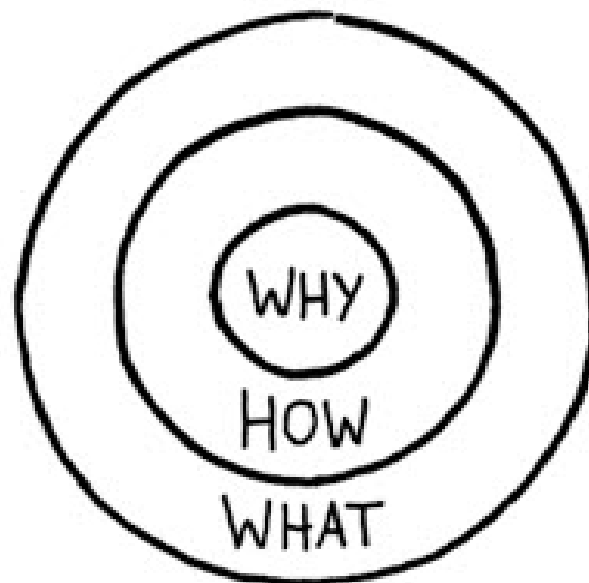
Knowledge. Insight. Strategy.

# Strategy





# The Golden Circle



© 2013 Simon Sinek, Inc.

## What

Every organization on the planet knows WHAT they do. These are products they sell or the services they offer.

## How

Some organizations know HOW they do it. These are the things that make them special or set them apart from their competition.

## Why

Very few organizations know WHY they do what they do. WHY is not about making money. That's a result. It's a purpose, cause or belief. It's the very reason your organization exists.

High-performing organizations  
aren't  
incrementally better; they think and  
react  
in fundamentally different ways



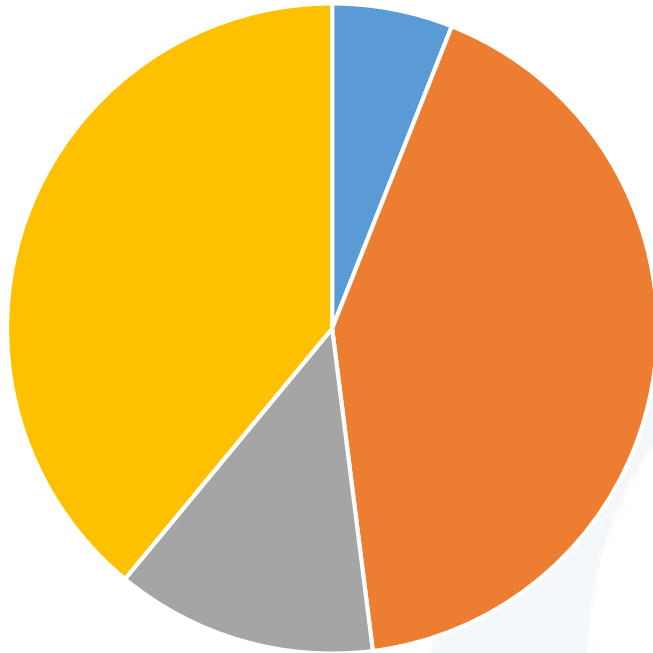
Rebecca Henderson

“Sustainable Business Strategy”

## *PURPOSE*

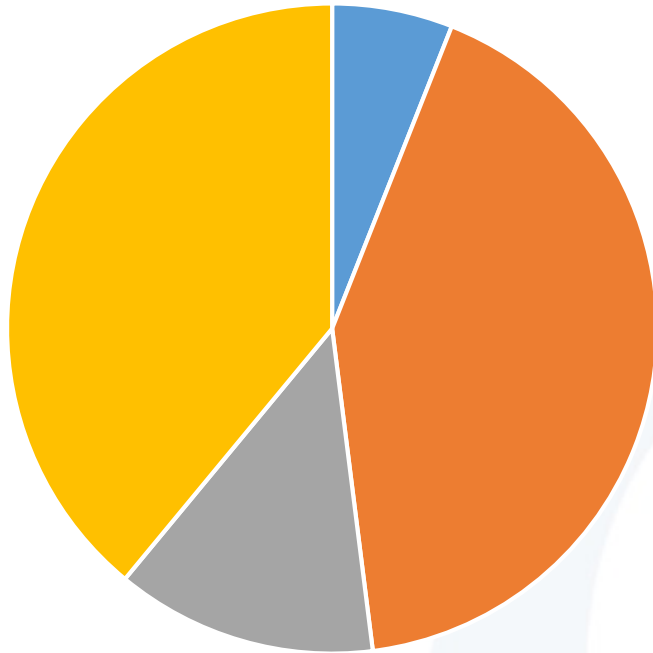
- Motivates, drives productivity, improves quality
- Attracts consumer interest and loyalty
- It is disruptive and forces innovation
- Delivers better performance by all metrics

# Risk: Perception



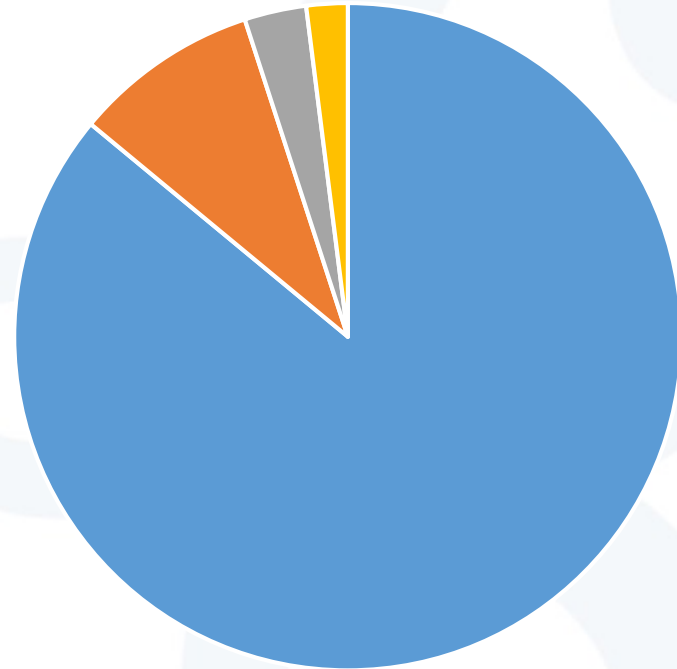
- Strategic
- Operating
- Legal and Compliance
- Financial Reporting

# Risk: Perception



- Strategic
- Operating
- Legal and Compliance
- Financial Reporting

# Risk: Reality



- Strategic
- Operating
- Legal and Compliance
- Financial Reporting

Strategy is about making choices,  
tradeoffs; you can't be all things  
to all people.

– Michael Porter

# The Role of Strategy

- **A Guide**
  - Sets the critical path
  - The North Star for how to get from today to your desired future state
- **A Test**
  - Is this the right thing to do?
  - Will it move us closer to success?
- **The ultimate check for management questions**

You can't always get what you  
want, but if you try....you get  
what  
you need.

– The Rolling  
Stones

**CALLAHAN**  
ASSOCIATES  
*the credit union company*

Knowledge. Insight. Strategy.



# Q&A Wrap UP



## The Informed Banker Speaker Series

### Chris Howard

Senior Vice President, Callahan & Associates

### Christine Ahlgren

Director of Strategic Business Alliances, Harland Clarke

[www.harlandclarke.com/webcasts](http://www.harlandclarke.com/webcasts)

Type your question in the chat panel 



[harlandclarke.com/LinkedIn](http://harlandclarke.com/LinkedIn)



[harlandclarke.com/Twitter](http://harlandclarke.com/Twitter)

***Presentation materials and video replay  
will be provided within one week.***

The content for this presentation was created by Chris Howard.  
The views and opinions expressed herein are those of the author, Chris Howard,  
and do not necessarily reflect those of Harland Clarke.

**Thank You (Sample)**

Thank you!

Chris Howard  
choward@callahan.com  
202-223-3920

CALLAHAN  
& ASSOCIATES  
*the credit union company*

Knowledge. Insight. Strategy.