



COMMUNITY BANKERS ASSOCIATION OF ILLINOIS

Webinar – On-Demand Web Link

Director Series: Strategic Planning Years 1, 3 & 5: Scope, Techniques & Drafting Your Plan

Wednesday, April 11, 2018

10 - 11:30 a.m.

Much has changed in the community banking industry over the past few years. Enhanced regulatory scrutiny, a new administration, continued mergers and acquisitions, new capital rules, increased competition — the list goes on. With all these moving pieces, strategic planning has become more critical than ever. To ensure continued success and profitability, every community bank board and management team should engage in intentional, “big picture” planning and formalize the process and results into a well-written strategic plan. This webinar provides an overview of the strategic planning process and address its scope and substantive considerations. In addition, it covers how to prepare an agenda, outlines various techniques used in drafting the written plan, and addresses the elements of a well-documented strategy.

HIGHLIGHTS

- Strategic planning is part of the director’s job
- Avoiding the “we’ve always done it that way” mentality
- Practical strategies for getting the most from the planning process
- Substantive planning considerations
- Mechanics of the planning process
- Creating an agenda for the planning session
- Appropriately documenting, monitoring, and reevaluating the strategic plan

TAKE-AWAY TOOLKIT

- Ten Commandments for Effective Community Bank Strategic Planning
- Employee training log
- Quiz you can administer to measure staff learning and a separate answer key

Attendance verification for CE credits provided upon request.

WHO SHOULD ATTEND?

This informative session is designed for directors and senior officers of community banks and their holding companies.

ABOUT THE PRESENTER

Jeffrey C. Gerrish is Chairman of the Board of Gerrish Smith Tuck Consultants, LLC, and a member of the Memphis-based law firm of Gerrish Smith Tuck, PC, Attorneys. The two firms have assisted over 2,000 financial institutions in all 50 states. Gerrish’s consulting and legal practice places special emphasis on strategic planning; community bank mergers and acquisitions; dealing with the regulators, particularly as related to enforcement actions; bank holding company formations; acquisition and ownership planning for directors; stock repurchase plans; regulatory and compliance issues, including fair lending, unfair and deceptive and abusive practices; capital raising; securities law; ESOPs; and other matters of importance to community financial institutions.

THREE REGISTRATION OPTIONS

1. LIVE WEBINAR

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2. ON-DEMAND WEB LINK**

Can’t attend the live webinar? The ON-DEMAND WEB LINK** is a recording of the live event including audio, visuals, and handouts. We even provide the presenter’s email address so you may ask follow-up questions. Within five business days following the webinar, you are provided with a web link that can be viewed anytime for the next six months. This link expires six months after the live program date.

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