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*Accelerating decision-making with dynamic group processes and state-of-the-art systems.*

## Case Study

### First Heritage Federal Credit Union

“After a one-day retreat with Prism Decision Systems, our team is armed with a fresh set of three-year strategies and immediate priorities,” said Arthur D. Field, president and CEO, First Heritage Federal Credit Union. “Without Prism’s process and CoNexus<sup>®</sup>, we would have required three or four full days to complete this work.”

#### Planning with quality and speed

What generates this kind of client satisfaction? The answer is simple: Prism delivers efficient process and effective group decision support.

#### Efficient process

Before the retreat, Prism meets with the planning team to help them define the key strategic issues facing the organization. Volunteers then research each issue and formulate strategic responses.

Consequently, First Heritage’s retreat began with a bang: a series of rich presentations advocated clearly defined strategies. Prism’s skilled facilitation helped the team expand upon and refine this preliminary work. They agreed to a set of three-year strategies shortly after lunch.

#### CoNexus<sup>®</sup>: identifying leverage

The First Heritage team then used the CoNexus<sup>®</sup> strategic profiling application to agree to four high-leverage, immediate priorities. “Prism and CoNexus<sup>®</sup> delivered great value to us in this process.” Mr. Field said. Indeed, organizations often grind through their planning process, fail to agree to priorities, and finish spent and frustrated.

In contrast, the First Heritage team left energized with a succinct plan that identified a clear path forward: quantifiable performance targets, a set of nine strategies, and four immediate priorities.