

Strategic Advisory Services

Customized Strategic Advisory Services
for Future-Ready Financial Institutions

Long-term success requires financial institutions to ‘think big.’ However, many struggle with where to focus, integrating goals into daily operations, and managing the latest technologies.

We understand you. Successful strategic planning requires a well-informed approach and actionable initiatives to support your strategic vision. Our comprehensive strategic advisory services are designed to pave the way toward long-term growth with confidence.

How We Help

Strategic Planning:



Through a data-driven approach, stakeholder collaboration, and industry insights, we identify opportunities for growth, efficiency, and innovation, tailored to your organization’s needs.

M&A Planning:



Guiding banks and credit unions through the complexities of mergers and acquisitions, from initial strategy to integration. By aligning technology, operations, and culture we help financial institutions maximize value and mitigate risk.

Performance Benchmarking:



Ensuring financial institutions can demonstrate a strong understanding of their customers/members, optimize offerings, and strengthen long-term relationships.

Our Process

Our multi-phased approach focuses on various areas crucial for strategic and tactical excellence.

Strategy Planning Process

Through interviews with key stakeholders and board members, we assess your current position, future goals, and the external factors affecting your institution. We then gather your input to help navigate these challenges within your existing framework.

Business Planning Process

In this phase, we bring stakeholders together to review internal findings and data, discuss industry best practices, and develop a roadmap for your bank or credit union. Insights from the strategic planning process are transformed into clear, actionable strategies that guide our collaboration.

Tactical Transformation

Building upon the strategic blueprint, we collaborate to translate tactical initiatives into actionable steps within your business planning framework. This approach facilitates the implementation of strategic goals while maintaining business continuity.

Quarterly Roundtable

In our post-planning follow-up meetings, we assist you in addressing any strategic challenges, realigning efforts if necessary, and examining the overarching strategic landscape. These sessions ensure ongoing support and maintain focus on the broader strategic objectives.

Why We Are Different

Our personalized approach is tailored to your financial institution's specific needs and goals. Education is the basis of our approach, and we strive to ensure our clients are in the best possible position to make informed decisions, both now and in the future.

Our people make us different. Every member of the Engage fi team has been hand-selected for their profound domain expertise and extensive industry experience. Coupling domain experience with industry expertise, our consultants come from either the vendor side of the industry, where they know the inner workings of negotiations, systems, and processes, or from credit unions and banks where they have walked in your shoes, can understand your needs, and will empathize with your current state.