



Sample NAIFA Chapter Strategic Planning Survey

Instructions

Thank you again for being a part of our NAIFA Chapter's Strategic Planning process. We appreciate you providing your unique input into the questions we will consider as part of the next step of this process.

Your advanced thought will allow us to hit the ground running when we get back together for our actual planning session.

Please submit your responses no later than the end of the business day on **xx/xx/xxxx**.

There are no right or wrong answers. Your responses to this survey will be treated confidentially and only shared in the aggregate.

A majority of the questions on this survey are open-ended questions, so please plan accordingly and allow the time necessary to provide your insight. Although time will vary depending on the depth of your answers, we recommend allowing at least 30 minutes to complete the survey.

If you need to return to the survey at a later time to complete or adjust your answers, you may do so prior to **xx/xx/xxxx** by using the personal link provided.

Note: To save your work before exiting, you will need to complete whatever page you are on and click "Continue/Save" at the bottom of that page.

1. What is your Chapter's specific purpose?
2. Who does your Chapter serve?
3. As you think about your Chapter today, succinctly list 2-3 strengths of the Chapter. Please be as specific as possible.
4. As you think about your Chapter today, succinctly list 2-3 weaknesses of the Chapter. Please be as specific as possible.
5. As you think about your Chapter over the next 3 years, succinctly list 2-3 opportunities for the Chapter. Please be as specific as possible.
6. As you think about your Chapter over the next 3 years, succinctly list 2-3 threats facing the Chapter. Be as specific as possible.

GOAL: Membership Growth – NAIFA's Membership Growth Goal

By 2025, NAIFA will create and implement a sustainable growth model that assures it is recognized as the leading voice and preeminent membership association for insurance and financial security professionals in the United States. Carrier companies, broker-dealers, and individual agents and advisors

will recognize NAIFA's advocacy and professional development strength and view NAIFA membership as fundamental to professional and industry success. This will be accomplished through a focus on:

- Increased Engagement
- Diversity, Equity & Inclusion
- Young Professionals
- Advocacy

When answering the following questions, consider your Chapter's specific role or perspective related to just the membership growth goal above.

7. When considering what it will take to accomplish the goal of meaningfully growing membership over the next 3 years, what do we need to know before we start?
8. As we consider meaningfully growing membership over the next 3 years, what are the top opportunities that are unique to our Chapter?
9. In order to accomplish meaningfully growing membership over the next 3 years, what will need to change?
10. In order to accomplish meaningfully growing membership over the next 3 years, what do we need to stop doing or give up?
11. In order to accomplish meaningfully growing membership over the next 3 years, what is important that we keep doing?
12. As we consider meaningfully growing membership over the next 3 years, what are the roadblocks and/or constraints that may create barriers to our success?

GOAL: Brand Amplification – NAIFA's Brand Amplification Goal

By 2025, NAIFA will take its brand identity that projects strength, success, and value and amplify it to the American population of insurance and financial professionals. The brand will resonate with members, non-members, insurance and financial services organizations and companies, the media, legislators and regulators, and other stakeholders. NAIFA's brand will be uniform across its Chapters and will generate feelings of pride and unity for members and volunteer leaders in every state and local Chapter. This will be accomplished through a focus on:

- Diversity, Equity & Inclusion
- Clear and Consistent Value Proposition
- Advocacy

When answering the following questions, consider your Chapter's specific role or perspective related to just the brand amplification goal above.

13. When considering what it will take to accomplish the goal of meaningfully amplifying the brand over the next 3 years, what do we need to know before we start?
14. As we consider meaningfully amplifying the brand over the next 3 years, what are the top opportunities that are unique to our Chapter?
15. In order to accomplish the goal of meaningfully amplifying the brand over the next 3 years, what needs to change?

16. In order to accomplish the goal of meaningfully amplifying the brand over the next 3 years, what do we need to stop doing or give up?
17. In order to do accomplish the goal of meaningfully amplifying the brand over the next 3 years, what is important that we keep doing?
18. As we consider the goal of meaningfully amplifying the brand over the next 3 years, what are the roadblocks and/or constraints that may create barriers to our success?

GOAL: Member Experience – NAIFA’s Member Experience Goal

By 2025, NAIFA will provide members with a high-quality, inclusive, and innovative quality member experience to a united group of professionals throughout their careers. The high-quality membership experience will be consistent for all NAIFA members and will include opportunities to engage in advocacy, professional development, and networking programs. NAIFA membership will deliver consistent, high-level value for members and the consumers and communities they serve. This will be accomplished through a focus on:

- Consistent Quality
- Innovation
- Unity

When answering the following questions, consider your Chapter's specific role or perspective related to just the member experience goal above.

19. When considering what it will take to accomplish the goal of delivering on the desired member experience over the next 3 years, what do we need to know before we start?
20. As we consider meaningfully delivering on the desired member experience over the next 3 years, what are the top opportunities that are unique to our Chapter?
21. In order to accomplish the goal of delivering on the desired member experience over the next 3 years, what needs to change?
22. In order to accomplish the goal of delivering on the desired member experience over the next 3 years, what do we need to stop doing or give up?
23. In order to accomplish the goal of delivering on the desired member experience over the next 3 years, what is important that we keep doing?
24. As we consider the goal of delivering on the desired member experience over the next 3 years, what are the roadblocks and/or constraints that may create barriers to our success?

Your Role In NAIFA/Additional Comments

25. Please offer any additional comments you would like to share.
26. What best describes your current role with NAIFA?
 - NAIFA Chapter Board Member/Volunteer
 - NAIFA Staff Member

Thank you for taking the time to provide your insight into our NAIFA Chapter’s future. Your unique perspective is invaluable to the planning process.