

# CUES Advanced Management Program from Cornell University

## Insights & Curriculum

CUES Advanced Management Program from Cornell University explores eight key C-suite roles: **CEO, CFO, COO, CMO, CIO, CCO, CRO, CHRO.**

Developed and taught by Cornell's top faculty, eCornell courses are designed to fit seamlessly into busy professional schedules. Collaborative discussions and hands-on projects help translate concepts into real-world credit union solutions.

The program spans nine months. Participants:

- ✦ Complete eight eCornell courses independently, and join their classmates for live, interactive sessions.
- ✦ Spend approximately 30 hours monthly on coursework and projects, with 6–8 hours dedicated to online courses.

## Credentials & Credits

Students who complete all sessions and required course work earn:

- ✦ The prestigious Certified Credit Union Executive Manager (CEM) designation
- ✦ An Executive Certificate in Management and Leadership from Cornell University and CUES
- ✦ 6.4 CEUs

## Course Curriculum

### Program Orientation

July 7, 2026

Date and time subject to change

### Course 1: The CEO Mindset—Developing and Communicating Vision and Strategy

July 15–28, 2026

Organizations that instill a clear vision and an effective business strategy at all levels are far more likely to succeed in our increasingly volatile, uncertain, complex, and ambiguous (VUCA) world. But before you can effectively define and impart your vision and business strategy to your organization, you must analyze and have a comprehensive understanding of the various

facets of your operating environment. In this course, you will explore effective ways to achieve these goals with General George W. Casey, Jr. You will objectively assess the three critical dimensions of your operating environment (internal, external, and competitive) using the VUCA index so you can identify potential vulnerabilities and opportunities for your organization. You will then identify the characteristics of an effective vision statement and outline a clear vision for your organization. Finally, you will outline a plan to instill your vision and business strategy in your organization.

*Led by General George W. Casey, JCB*

## **Live-Taught Session 1: Leading with a CEO Mindset**

Date & Time TBD

This session will begin with an introduction to Cornell University and this certificate program, followed by Leading with a CEO Mindset with General George W. Casey, JCB.

## **Course 2: The CFO Mindset—Understanding Financial Statements**

August 12–25, 2026

Every organization's finance function keeps detailed records of the daily transactions involved in running the organization. Periodically, they create reports that allow management, stakeholders and regulating authorities to have insight into the financial health of the organization. As a manager, you need to understand both the metrics that are reported in income statement, balance sheets, and cash flow statements, and how they relate to each other. You also need to understand how comparing numbers across your company, the industry, and from year to year, can help you assess the overall financial performance of the firm.

The in-depth review of sample case studies in this course will provide you with the tools you need to examine your own organization's reports. As you make budgeting and investment decisions, your knowledge of how vital financial markers indicate relative health in the organization will help drive initiatives to meet your company's financial goals.

### **Key Takeaways**

- ✦ Understand the structure of the three principal financial statements: the income statement, the balance sheet, and the cash flow statement, and interpret the information found in these statements
- ✦ Identify online sources of financial information that can be used to conduct research on other publicly traded firms and industries

## **Live-Taught Session 2: The CFO Mindset—Connecting the Numbers to Strategy and Performance**

Date & Time TBD

During this live session, the participants will connect with the faculty to go deeper into the key metrics and mindsets that a CFO links toward in the organization. For this session, the faculty will discuss some of the financial linkages that senior leaders need to be aware of to build understanding of the financial levers and strategies within their organization. We will also include credit union specific examples of the type of financial metrics that could be utilized to build dashboards and financial awareness of the organization's performance.

## **Course 3: The COO Mindset—Change, Disruption, and Growth.**

September 9–22, 2026

Change can be a highly profitable opportunity for growth, or it can sink a once-successful organization. How should you and your credit union prepare to adapt and even thrive in the face of change and disruption?

In this course, you will acquire the tools you need to evaluate change, disruption, and uncertainty in your industry. You will implement key frameworks designed to help you strategize in changing and uncertain environments. The skills you hone in this course will prepare you to succeed in dynamic market environments and think clearly about the future.

Of course, strategies for change risk failing if the organization as a whole is not willing or prepared to implement them. To pave the way for truly successful implementation of the strategies you devise, you will identify and mitigate critical internal challenges and resistance to change, thereby enabling your organization to eliminate roadblocks to growth.

### **Key Takeaways**

- ✦ Assess change, disruption and uncertainty in your industry
- ✦ Evaluate how your organization can respond successfully to change and devise appropriate strategies to do so
- ✦ Identify and mitigate challenges to change within your organization

## **Live-Taught Session 3: The COO Mindset**

Date & Time TBD

For this live session, professor Vishal Gaur will give an overview of how operations connects to the strategic alignment of the organization. He will share tools and techniques to grow the COO mindset of a leader in thinking about the operational and supply chain side of the organization's strategy. He will then conduct a breakout session to give credit union leaders the opportunity to share some of the key operational ideas and metrics that can impact the strategic goals of a credit union regarding day-to-day operations and expansion.

## Course 4: Brand Purpose

October 7–20, 2026

In this course, you will evaluate your brand and define actions you can take to enhance your brand's performance. You will start by exploring the elements that make some brands great, why some brands garner premium consideration, and, as appropriate, how to improve a brand. You will work to create a great brand purpose and learn how to monitor the market to support the longevity of your brand by analyzing the impact of trends on your brand. You will also assess and strengthen your brand's mission, vision, and values. By the end of this course, you will have a strong vision, mission, a list of values for your brand and strategies to propel your brand forward.

### Key Takeaways

- ✦ Develop a plan to maximize your brand's volume, price, satisfaction, and repurchase premiums
- ✦ Analyze market trends to identify the most significant challenges and opportunities for your brand
- ✦ Assess your brand readiness to address market challenges and opportunities
- ✦ Define the building blocks of brand purpose: vision, mission, and values

## Live-Taught Session 4: The CMO Mindset: Brand Purpose

Date & Time TBD

This session provides a clear overview of the digital marketing world. Discover how players such as ad networks, demand-side platforms and data management platforms interact with advertisers, agencies and publishers. Then learn how to use time-proven frameworks to assess your customers' needs and identify your primary marketing objectives. Once you've put that all together, you'll learn how to evaluate the performance of digital marketing campaigns.

## Course 5: AI and Digital Technology: Opportunities and Pitfalls

November 11–24, 2026

As new digital technologies become embedded in business operations, there are more questions than answers for many leaders. How can you harness the power of digital technologies to help your credit union thrive without falling into pitfalls along the way?

In this course, you will gain a foundation in a number of technological advances. You will start by discussing ways that technologies can improve your personal and professional life, including ways to produce work more smoothly, quickly, and effectively. You will also explore ways that technologies fail to deliver on promised results and access methods to prepare your team to benefit from digital technologies. By the end of this course, you will understand ways to harness the opportunities and avoid the pitfalls of digital technologies.

## Key Takeaways

- ✦ Understand advances in digital technology
- ✦ Assess examples of digital technologies that have had positive impacts and relate them to an opportunity mode
- ✦ Assess examples of digital technologies that have had negative impacts and relate them to a failure mode
- ✦ Determine the readiness of you and your team members to benefit from digital technology

## Live-Taught Session 5: AI and Business Transformation

Date & Time TBD

The CIO at the credit union no longer is solely responsible for maintaining technology and making the organization's systems faster. Today the CIO plays a critical role in shifting the credit union toward a more flexible, modular system that allows it to roll out and change services at a previously unthinkable pace. They help create flexible, member-centric features off of nimble, cloud-based platforms that can be enhanced quickly and continuously. The CIO enables even modest-sized organizations keep up with the rapid pace of change in Fintechs.

In this session, you will learn best practices for gathering and using member data to shape services, improve member experience, and enhance engagement.

## Course 6: The CCO Mindset—Structuring Business Agreements for Success

January 6–19, 2027

Contracts are often written by legal professionals, but the best business deals are ones worked out collaboratively by people who know their business operations intimately.

This course will help you gain a seat at the negotiating table, familiarizing you with legal terms and concepts involved in the business deals. You'll learn how to collaborate with legal counsel and help negotiating parties address information gaps to reach agreement.

With content provided by two Cornell Law School professors and two practicing corporate attorneys this course is rich with practical video content and a course project that's designed to help you apply what you've learned to your work situation.

- ✦ Analyze the structure of contracts
- ✦ Embrace basic contract principles and guidelines
- ✦ Evaluate how contract provisions address information gaps and assign risk in a business agreement
- ✦ Prepare for effective use of representations, warranties and covenants in contracts
- ✦ Assess the benefits and challenges associated with post-closing price adjustments

## **Live-Taught Session 6: The CRO Mindset—The Relationship between the CRO and Legal Counsel**

Date & Time TBD

In this session you will examine the critical relationship between the CRO and legal counsel and how best to establish an effective relationship with both inhouse and external counsel and how to work with legal professionals to navigate legal obstacles and accomplish business goals.

## **Course 7: The CHRO Mindset—Motivating People for High Performance**

February 10–23, 2027

Leaders are responsible for encouraging the highest possible performance from their employees. Most leaders recognize that motivation is a key driver of high performance. Few leaders are skilled at choosing the right combination of approaches and tools to motivate all of their people. Not all individuals are motivated by the same things, and some might be demotivated by the same conditions or incentives that motivate others. This session prepares you to analyze performance problems and assess whether they actually can be attributed to a lack of motivation or to one of several other root causes.

You will learn how to increase the factors that do motivate people and improve workplace performance. You will also use the three primary drivers of human motivation to foster better performance on the job.

### **Key Takeaways**

- ✦ Identify your personal primary driver for motivation
- ✦ Conduct a root-cause analysis for an individual with performance gaps
- ✦ Evaluate factors that undermine employee motivation and engagement in your organization
- ✦ Use the three critical primary motivation drivers to tailor your approach to motivation
- ✦ Enhance the conditions for an individual that make optimal use of that person's key motivation driver

## **Live-Taught Session 7: The CHRO Mindset—Leading High Performance Teams**

Date & Time TBD

During this session, the focus will be on the human capital development area of the organization's strategy. One of the key elements of successful leaders is their ability to recruit, retain and develop their talent. The session will focus on the tools and techniques that leaders need to deploy to develop their talent and to position the organization's teams to be high

performing. The faculty will share techniques to increase engagement and innovation within the organization linked to team leadership.

## Course 8: Future Looking Skills—Preparing for the Future

March 10–23, 2027

In our VUCA world, it is easy to feel weighed down by daily issues. You can become so consumed by the difficulties of the present moment that you neglect to look ahead and analyze your larger mission. Yet as a leader, you have to be able to step back from the challenges that each day brings and assess the big picture. You have to help your people envision what the future looks like. Even the most skilled leaders agree that this is not easy. However, there are concrete measures you can take to prepare for future success.

In this course, you will learn how to develop a plan to evaluate your organization's ability to accomplish its vision and strategy. You will apply Lewin's three-stage model of change to enable your organization's continuous adaptation and devise a plan that demonstrates how you will sustain progress. Finally, you will apply the read, exercise, sleep, and think (REST) model to take care of yourself and remain effective as a leader.

### Key Takeaways

- ✦ Conduct continuous assessment and adaptation
- ✦ Plan for sustained momentum
- ✦ Prepare for what you can't control
- ✦ Take care of yourself — REST — to remain effective as a leader

## Live-Taught Session 8—Final Thoughts: What is Your Mindset? How to Lead Change

Date & Time TBD

For this final session and wrap, the faculty will introduce tools and techniques on how to pull all the skills and techniques the participants have learned during the program to drive change. The faculty will discuss how to experiment individually and organizationally to drive change and how to potentially overcome some of the initial barriers to change that may present themselves when you are trying new things. We will wrap up this session with a virtual graduation ceremony from the program.



Register for the next cohort at [cues.org/AMP](https://cues.org/AMP).