

Filene Research Institute 

AI AND EXECUTIVE LEADERSHIP:

How CU Execs Should Approach AI Strategy

August 6, 2025

WELCOME

TODAY'S AGENDA

- 1 AI Strategy & Executives
- 2 Panel Discussion
- 3 Closing Thoughts

YOUR HOST



**JESSICA
GAMACHE**

Head of Research
Filene

WITH



**LAMONT
BLACK**

Filene Fellow
DePaul University

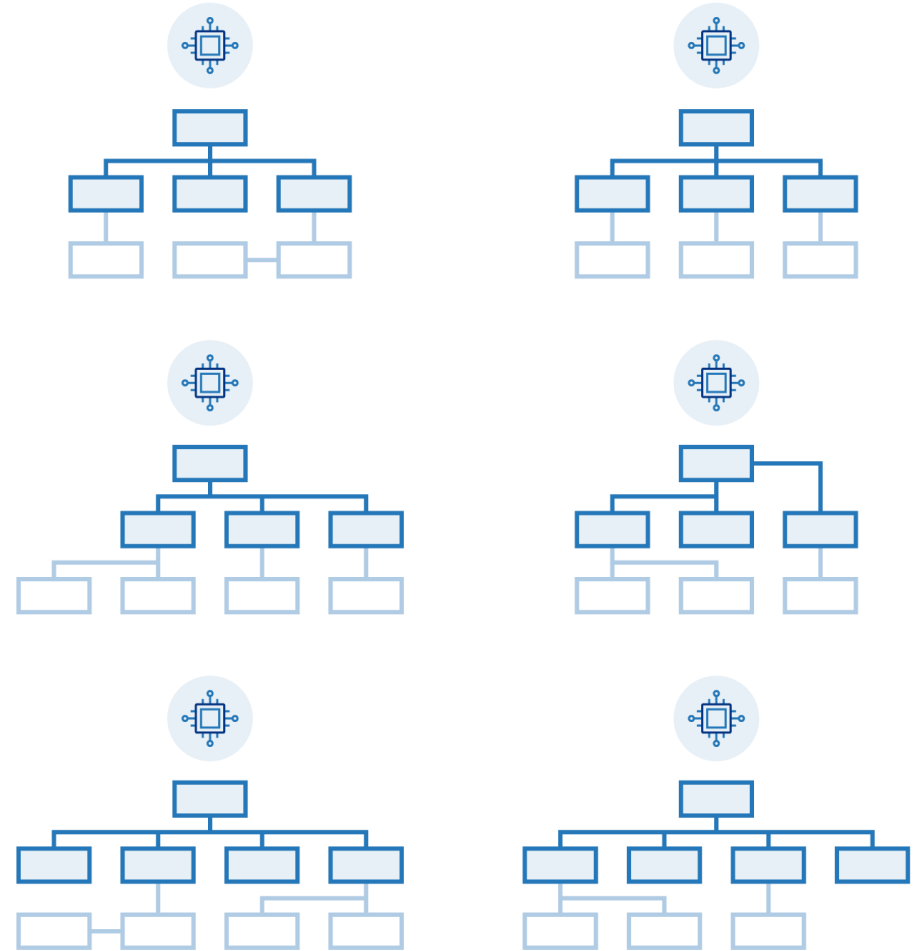
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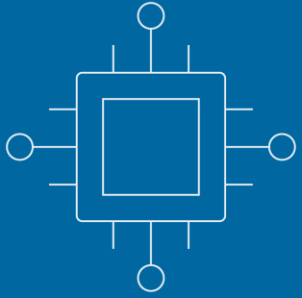
AI STRATEGY & EXECUTIVES

PREVIEW

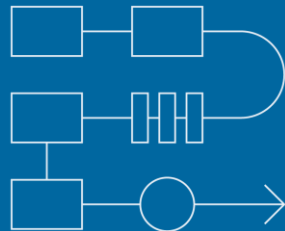
AI adoption needs to be **strategic**.

This makes it the responsibility of every **executive** and leadership team.

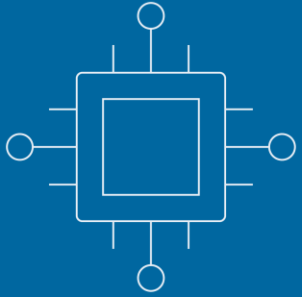




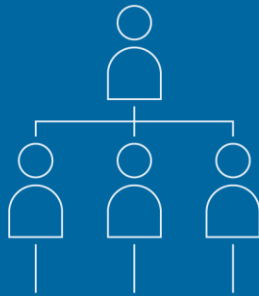
AI + STRATEGY



- AI is not just a **laundry list** of ‘what we are doing with AI’
- We are not just talking about bottom-up **tactics**
- AI adoption needs to be **strategic**
- Strategy is the role of **executives**



AI + EXECUTIVES



- AI needs the voice of the **CEO** from the top
- **Every executive** has a role to play in AI adoption
- This starts with execs **owning** the role of AI in their vertical
- Brainstorming **AI priorities** can be a helpful place to start
- Executive leadership teams need **alignment** around AI

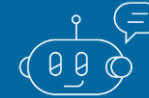
TYPES OF AI SOLUTIONS



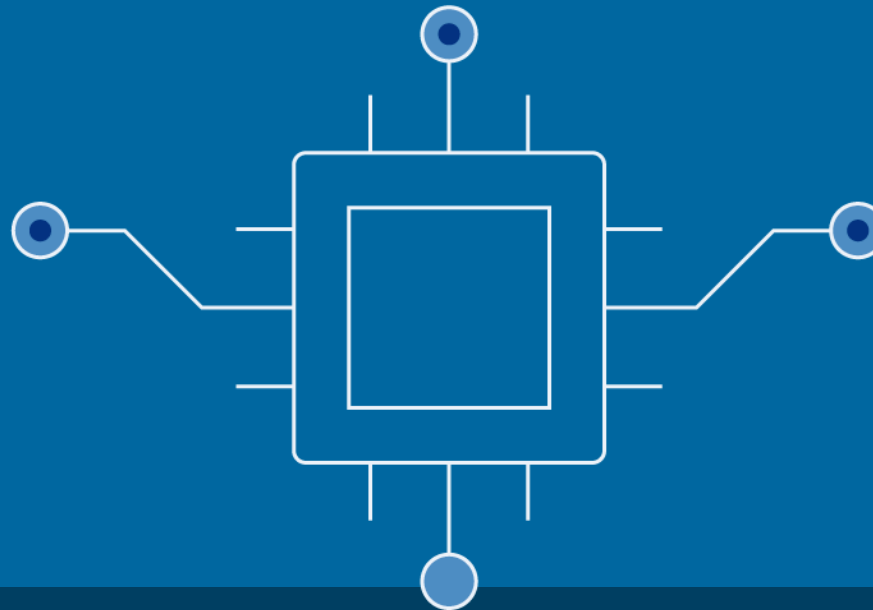
MACHINE LEARNING for analytics like loan decisioning is common



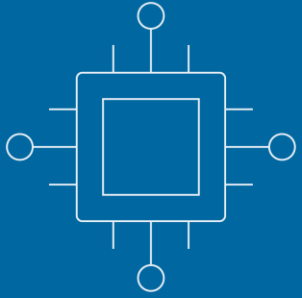
GENERATIVE AI for internal and external chatbots is growing



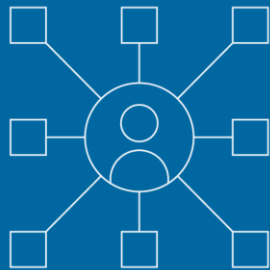
AGENTIC AI for workflow automation is at the frontier



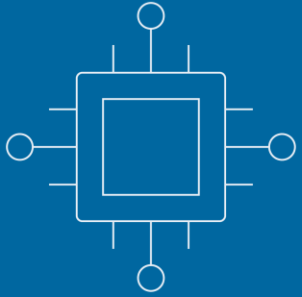
- Some solutions will use **vendors**
- Some will simply use a tool like Copilot for **problem-solving**



AI + EXECUTIVE ROLES



- **Lending:** Decisioning, pricing, and processing loans
- **Operations:** Member servicing, efficient workflows
- **Technology:** Governance, data usage, business support
- **Retail/Digital/Growth:** Personalization, member journey
- **Finance:** Reconciliation, reporting, forecasting
- **HR/People:** Recruiting, managing, learning & development
- **Risk:** Fraud, ALM, compliance, collections
- **Strategy:** Strategy for AI, using AI for strategy



AI + STRATEGIC PLANNING

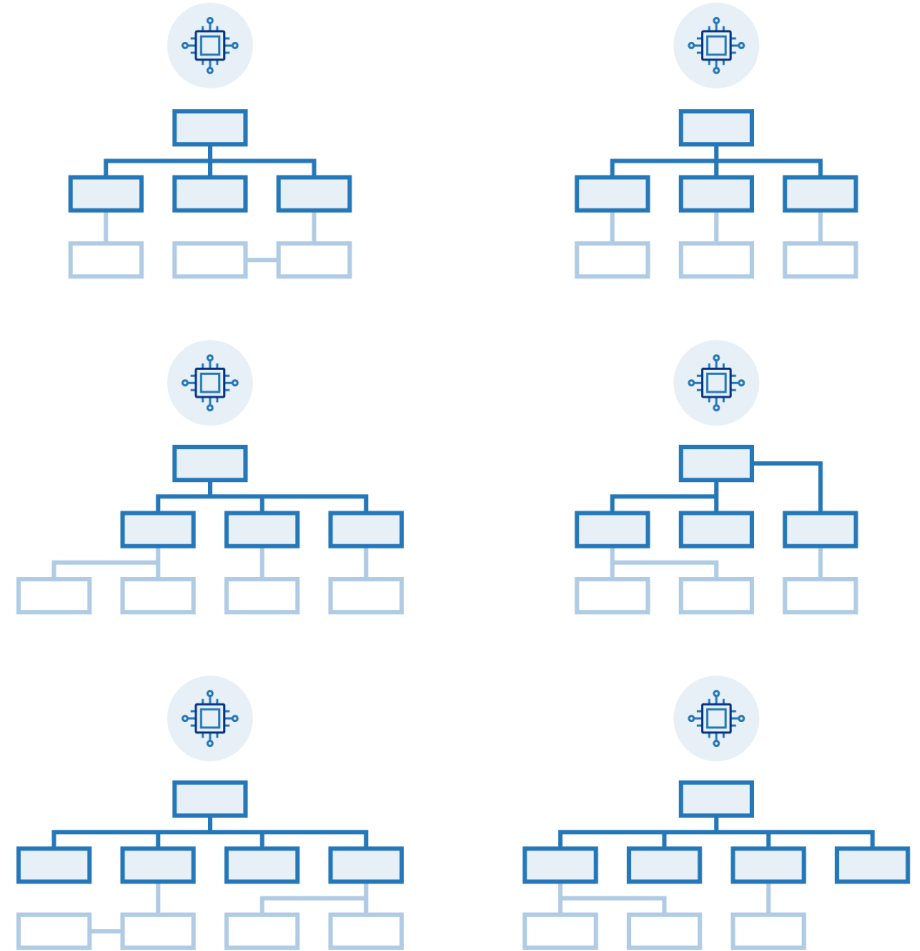


- Strategy is also the role of the **board**
- Integrate the role of AI into **strategic planning**
- Start with **education** and familiarity
- Get the board comfortable with their role in **governance**
- AI can be its **own pillar or support** for other pillars
- AI will become part of the strategic planning **process**

REVIEW

AI adoption needs to be **strategic**.

This makes it the responsibility of every **executive** and leadership team.



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PANEL DISCUSSION

WELCOME

OUR GUESTS



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President + CEO
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Blue FCU



SHAWN PREMIER

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Consumers Credit Union



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Chief Information Officer
Lighthouse Credit Union

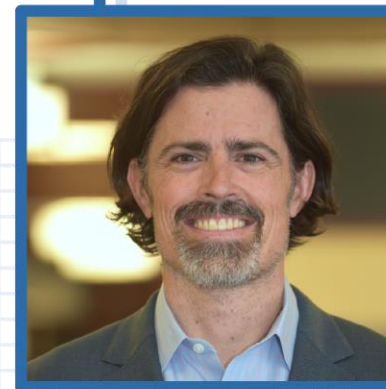
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CLOSING THOUGHTS

QUESTIONS?



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FILENE'S 2025 CREDIT UNION ENGAGEMENT PULSE

SURVEY



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THANK YOU

ACKNOWLEDGMENTS

Filene thanks its strategic partners supporting the Center for The Credit Union of the Future, and for helping make this research possible.



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