

THREE-YEAR STRATEGIC PLAN

Summary
FY2017-FY2019

Our Mission

To lead the investment profession globally by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of society.

Our Strategy

- To develop future professionals through relevant and accessible credentialing programs.
100% Market Penetration
- To deliver member value that accelerates the professional success of our members.
100% Member Satisfaction
- To build market integrity that benefits investors and our members that serve them.
100% Industry Penetration

Accountable and Measurable

The plan builds on our three strategic actions with five goals, each supported by actionable objectives and measurable targets. It is results-oriented and all employees in all functions are responsible for achieving these outcomes.

The strategies to achieve these objectives include specific themes that support products or stakeholders, and risk assessment and success metrics. Organizationally, the strategic functions have the full support of regional resources and supporting functions to achieve these global objectives.

STRATEGIC ACTIONS

DEVELOP FUTURE PROFESSIONALS

DELIVER MEMBER VALUE

BUILD MARKET INTEGRITY

GOALS

1. Grow global relevance, extend local reach
2. Deliver member value
3. Advance professionalism and professional recognition
4. Build market integrity to benefit society
5. Enhance operational excellence

FY2017-2019 OBJECTIVES

27 objectives with associated targets to achieve by the end of FY2019

Developed in consultation with the Board of Governors, member societies, advisors and staff, the three-year strategic plan sets forth how we will advance the value of the investment management profession in the communities we serve. While our goals are aspirational and create a clear definition of long-term success, the FY2017-2019 objectives define the specific targets we are working towards over the next three years in support of our mission.

Call to Action

As a member-driven institute, it is imperative that all CFA Institute staff own the FY2017-FY2019 strategic plan, see and operationalize how their role supports these objectives, and hold themselves accountable for achieving all organizational outcomes.

If we achieve these goals, CFA Institute and its members will become the professional body of the investment management industry.