



Dream, plan, achieve.

2022–2025 Strategic Plan



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Process

**Kickoff and alignment meeting
with the Board of Directors**

**Primary data collection
— 20 people consulted**

- Conversations with management
- Discussion group with staff members
- Conversations with external stakeholders
(including F.PIs.)

Analysis of the external environment





Mission and vision

Mission

As the leader in developing and promoting personal financial planning, ensure that today's and tomorrow's financial services professionals have the knowledge, the know-how and the social skills required to contribute to the financial well-being of people, families and communities.

Vision

Be the front-runner in personal financial planning education, recognized as a world-class teaching institute by both professionals and employers.

Values

Agility:

For us, excellence is not perfection.

It is knowing how to adapt to people, resources, needs, and circumstances, with ingenuity and sensitivity.

It is being in solution mode and exploring new paths, despite difficulties or obstacles.

It is a quest for optimization, with the flexibility required to face the challenges of our time.

Collaboration:

Our leadership is not complicated: we like to facilitate finances, learning, meetings, exchanges, and much more.

We consult. We share. We mobilize.

We work together to get things moving.

We don't just invite people to the party: we ask them to dance.

And we like to think that this spirit of co-creation rubs off a little on our partners.

Consideration:

Our intentions are clear: to create value, with people at the centre of it all.

We listen to others because we believe that everyone deserves to be heard.

We are passionate about relationships.

Not just because we're supposed to be but because they inspire us.

Because we believe that everyone is part of the solution.

And because we thrive by helping others thrive.

Values

Enthusiasm:

With the financial well-being of people, families, and communities as our shared mission, we cultivate our passion for the client experience and financial planning.

We're here because we are sold on the idea!

Our zeal and engagement are hard to hide because we put our hearts into everything we do.

We explore, we learn, we adapt.

And we contribute to something bigger than ourselves.

Openness:

We do not take our knowledge and our certainties for granted.

We keep our minds open, because we want our products and services to be perceived as evolving, relevant, and welcoming.

Our creativity is rigorous, but we're not afraid to question ourselves when necessary.

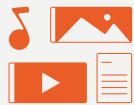
This gives us the means and the space needed to rethink our methods, which ensures that we walk our talk.

A woman with long brown hair, wearing a red corduroy jacket and a watch, stands in a coffee shop. She is looking to her left. The background shows shelves filled with coffee bags. A light blue rectangular overlay is at the top of the image.

“ Make the client experience a distinguishing factor that provides added value. ”

Strategic priorities

Summary of orientations



Content

Diversify* the content, formats and people involved in order to train various audiences and ensure that the value of IPFP is recognized by the greatest number of financial services professionals.



Client experience

Increase attraction, conversion and retention through the client experience. Make the client experience a distinguishing factor that provides added value.



Awareness

Significantly increase awareness of the profession among its target audiences. Make the profession known and promote it (and its actions).



Organizational capacity

Ensure that we have the organizational capacity required to achieve ambitious goals by adopting a culture of performance based on agility, innovation and personal and collective initiative. Support all team members to effect a rapid, harmonious transition.

* *Diversification* ≠ watering down or reducing the quality of the content.
Diversification = expanding the scope of the IQPF content.

Strategic priorities

Summary of actions



Content

Define a new content design and delivery approach.

Establish tools and support for the practice



Client experience

Define target segments and design adapted, modular pathways for each one.

Improve service efficiency.

Measure the client experience.

Develop new tools for improving the experience, at every stage of the training cycle.



Awareness

Rethink the IQPF's brand identity.

Deploy strategies of presence, influence and referral.

Develop and implement a more efficient content strategy by leveraging our affiliates.

Raise affiliates' awareness of the IQPF's products and services.



Organizational capacity

Nourish a culture of performance and development.

Develop the digital culture and emphasize the digital shift.

Cultivate engagement.

A man in a yellow t-shirt is seen from behind, carrying two young children on his shoulders. They are in a field of red poppies. The man is wearing dark pants. The child on the left is wearing a light blue shirt and pink leggings with colorful patterns. The child on the right is wearing a pink and white striped shirt and pink leggings with owl patterns. In the background, there are trees and a child in a blue shirt walking away. A solid orange horizontal bar is positioned below the main text.

“ Contribute to the financial well-being of people, families and communities. ”



Content

Actions – The details

ACTIONS

MEASURES

	DEFINE A NEW CONTENT DESIGN AND DELIVERY APPROACH	ESTABLISH TOOLS AND SUPPORT FOR THE PRACTICE
	Explore the feasibility of developing different levels of certification (e.g., financial advisor).	Adjust the QPP calculator and make it available.
	Design, test and deploy new teaching methods: short contents, blocks, co-development, etc.	Offer tools to fulfil contract and financial plan obligations (compliance standard, note taking, etc.).
	Adopt a holistic approach to professional development (competency guide).	Conduct a needs analysis to determine the tools to develop over the coming years.
	Develop a targeted offer and targeted content for self-employed F.PIs.	Develop practice support tools that will be useful for affiliates based on identified needs.
	Develop a targeted offer and targeted content for F.PIs. working in institutions.	Finish updating La Collection (content and form).
	Develop and roll out a specialization program for affiliates.	Develop learning mechanisms and instruments for instructors.
	Expand bilateral relationships with university and college education institutions.	
	Explore and seize income diversification opportunities.	



Client experience

Actions – The details

ACTIONS

MEASURES

	DEFINE TARGET SEGMENTS AND DESIGN ADAPTED, MODULAR PATHWAYS FOR EACH ONE	DEVELOP NEW TOOLS FOR IMPROVING THE EXPERIENCE, AT EVERY STAGE OF THE TRAINING CYCLE	IMPROVE SERVICE EFFICIENCY	MEASURE THE CLIENT EXPERIENCE
	Validate the segments developed and build related personas.	Digitize the professional training application process.	Clarify the need and identify a resource to take charge of the strategic priority.	Introduce assessment instruments at various points on the pathway.
	Organize the dialogue and implement a sounding board with target client groups.	Digitize the professional development provider accreditation process.	Assess the possibility to reducing the response time and standardizing certain conversations (e.g., chatbot).	Introduce continual feedback mechanisms.
	Map out client pathways and identify opportunities (moments of exultation, moments of difficulty).	Automate the executive program pathway, the registration process for modules and exams and the posting of results.	Create and finalize a typology of "standardized" requests.	
	Develop and implement a feedback process for comments received.	Develop and roll out an online payment solution.	Improve and verify the main web resources.	
	Identify and implement easy wins.	Automate the equivalency exam pathway and make available the result.	Develop "service standards" and publish a commitment.	
		Analyse performance and rethink the choice of platform and database.		
		Define needs and expectations related to the customization of the digital client space.		
		Assess the feasibility of serving as a host for external content (white label).		



Awareness

Actions – The details

ACTIONS

MEASURES

	RETHINK THE IQPF'S BRAND IDENTITY	DEPLOY STRATEGIES OF PRESENCE, INFLUENCE AND REFERRAL	DEVELOP AND IMPLEMENT A MORE EFFICIENT CONTENT STRATEGY BY LEVERAGING OUR AFFILIATES	RAISE AFFILIATES' AWARENESS OF THE IQPF'S PRODUCTS AND SERVICES
	Develop an identity framework.	Develop and improve partnerships that can increase visibility and reach.	Define content plans for each target client group.	Adopt efficient means for reaching affiliates (review email templates, do SMS marketing, improve CRM).
	Reconsider the name of the organization.	Solidify our presence with policy makers.	Develop tools for promoting the F.Pl. profession.	
	Define client groups / personas (segmentation).	Establish a marketing strategy, including campaigns that focus on the IQPF's priority audiences (e.g., future financial planners).	Launch a social media strategy.	Engage in more sustained and structured interactions with major employers.
	Define content pillars.	Develop and deploy an organic search engine strategy.	Identify and equip ambassadors for the F.Pl. profession and the IQPF brand.	
		Develop and deploy a public relations strategy.	Rethink the names of certain courses.	
		Identify needs and overhaul the website.		
		Assess the feasibility of an "IQPF seal" certifying that the financial planning report is presented by someone authorized to use the F.Pl. designation.		
		Establish relevant metrics and measurement methods. Set up a marketing dashboard.		



Organizational capacity

Actions – The details

ACTIONS

MEASURES

	NOURISH A CULTURE OF PERFORMANCE AND DEVELOPMENT	DEVELOP THE DIGITAL CULTURE AND EMPHASIZE THE DIGITAL SHIFT	CULTIVATE ENGAGEMENT
	Encourage our collaborators to continually develop new competencies and to demonstrate curiosity and initiative.	Implement strategic and technological watch processes.	Continue to develop exemplarity mechanisms.
	Every team member has a personal development plan (PDP).	Continue the transition to more sophisticated internal governance instruments.	Instil a culture of transparency and multi-level collaboration in the spirit of collegiality.
	Establish and promote long-term development opportunities for every team member.		Enhance the sense of belonging.
			Consider initiatives to promote belonging (e.g., pin, merchandise, etc.).
			Align individual and collective or organizational interests.

A man with a beard, wearing a white sweater, is sitting outdoors and reading a book. The background is a blurred outdoor setting with trees and a fence. A large light blue rectangular area is positioned above the text.

**“ Train tomorrow’s
professionals. ”**

