

# CUnicorn

## Phase 3

The CUnicorn Phase is the zenith of CU 2.0's fintech entrepreneurial program. At this level, you're not just a startup; you're an industry leader. This phase is geared toward sustaining your growth among tech-friendly credit unions—and even expanding into more mainstream buyers.



The Technology Adoption Lifecycle

## Pillars of Focus

- 1. Advanced Pricing Models**  
Design pricing models that are geared for long-term revenue sustainability.
- 2. Scale and Forecasting**  
Implement advanced analytics and forecasting tools for business intelligence.
- 3. Advisory Boards**  
Assemble a board of advisors that complement your strategic goals.
- 4. Sales Maturity**  
Advance your prospecting, pipeline, and sales tools to provide for sustained growth.



## Key Activities

- Analyze capital raising strategies for series funding
- Explore CUSO creation, guidance, and governance
- Perform comprehensive financial audits for investor readiness
- Begin exit strategy planning
- Reactivate past dead leads
- Introduce systemic magnifiers
- Implement the Entrepreneurial Operating System (EOS)



## Boardroom

Access to a Boardroom group of CUnicorn fintech entrepreneurs to help with key goals, education, insights, and occasional in-person meetups.



## Adoption Cycle Alignment

As shown in the graphic above, the CUnicorn phase is tailored to capturing the “early majority” and “late majority” (and even “laggards”) of the technology adoption lifecycle. By this stage, you can successfully sell to credit unions that only buy from established vendors and can focus on market domination (insert evil laugh).



## Level Up

In the CUnicorn Phase, the concept of “leveling up” is moot. You're now a market leader, and CU 2.0 serves as your strategic partner to usher you into new market opportunities and collaborations.