



# STRATEGIC PLANNING FOR OPERATIONAL SUCCESS



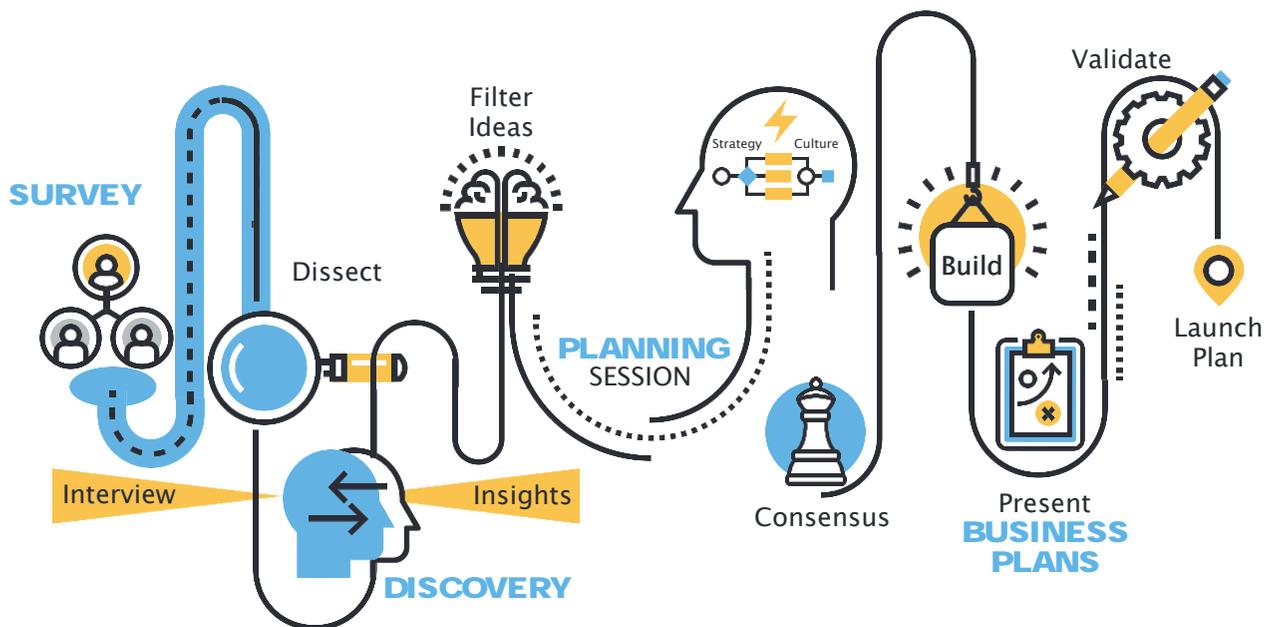
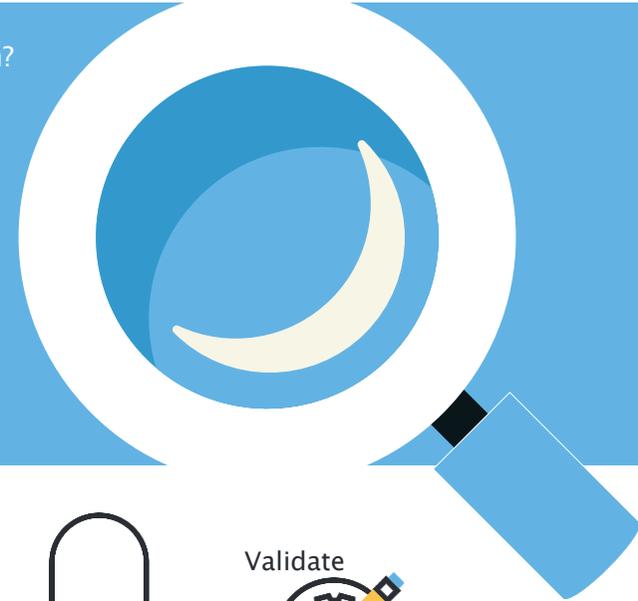
Kevin Stang  
President, CUXcel

Rich Jones  
President, Leading2Leadership

# PLAN FOR OPERATIONAL SUCCESS

Frustrated with the progress you are achieving with your strategic plan?  
Are you finding top to bottom strategic alignment a struggle?  
Do you feel all the above diminishes your opportunity for success?  
Does your culture align with your strategic objectives?

Working with Kevin Stang, CUXcel LLC and Rich Jones, Leading2Leadership LLC, we take strategic planning from a one- or two-day event to an end-to-end process that aligns your credit union, top to bottom and bottom to top, strategically, culturally, and structurally. With this alignment, your credit union will be able to transform to the organization you want for your membership and employees.



Do the Right Work, at the Right Time, the Right Way

## OUR UNIQUE 4 PHASE PROCESS



### (1) TEAM SURVEY

Our pre-planning survey will produce MORE inputs, that are MORE honest, and MORE thought-out, while driving ownership for the plan.



### (2) DISCOVERY

We'll interview key stakeholders tasked with executing the plan and develop a "Team Engagement Plan" (TEP) that helps align your culture with your strategy.



### (3) STRATEGIC PLANNING

We'll transform the Situational Analysis and TEP into a solid strategy while focusing on instilling the disciplines necessary to make the cultural shift.



### (4) LAUNCH BUSINESS PLANS

A month after the session, objective owners will present their plan for execution. Resources will be validated and so plan can launch immediately.

# ALIGN CULTURE WITH STRATEGY

The SPOS process puts a great amount of attention on the "human element." Having the right strategy is important, but to get the best results you must focus on those in charge of executing it. Throughout all the stages of this process your credit union is transforming to align your culture with your strategy.



## WINNING DISCIPLINE

Our focus will be to convey Best Principles, as opposed to Best Practices. A best practice might be to meet weekly so individuals can report progress, while a best principle would be to meet weekly to help each other progress.



## TEAM COMMITMENT

Strategic Objectives will be assigned to individual owners, but everyone is committed to each and every objective that make up the institution strategy. If one person is swept up in their daily activities, the rest will be there too.



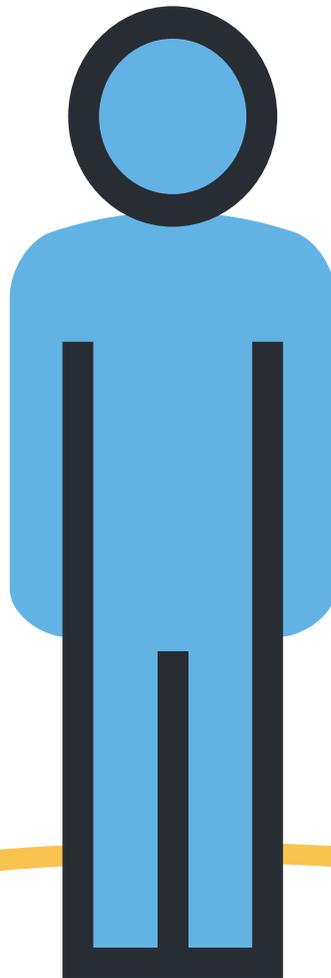
## SENSE OF OWNERSHIP

All four phases of the SPOS engagement force involvement from all team members tasked with implementing the plan. Additionally, mid-level managers who may not be at the planning session will have their voice during the first two phases of the engagement.



## SELF ACCOUNTABLE

Results drive engagement and instills a mindset of winning. This mindset isn't as much about holding each other accountable as it is about holding one's self accountable. We will help instill this principle through the use of unique Scorecard Metrics that help each owner see their influence on the strategy.



## STRATEGY

A thorough Situational Analysis will help define the strategy. Aside from key research inputs, all team members will have ample time and opportunity throughout the engagement to provide contemplative inputs.

## CULTURE

At the core of the SPOS engagement are the timeless and self-evident principle behaviors above. These disciplines are in place to guide your culture to align with your Strategy and drive Execution.

## EXECUTION

The final step in the SPOS Engagement is the presentation and validation of a business plan for each key objective. The strategy has no chance for success if the objectives hit budget, resource, or other barriers.

Your Facilitator Team

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## ABOUT US



### 50 YEARS EXPERIENCE

Kevin Stang and Rich Jones bring a combined 50 years of experience, both working for credit unions and on behalf of credit unions.



### 300+ CU'S ADVISED

Having advised over 300 credit unions, we have keyed in on numerous barriers to execution and have developed a groundbreaking method to build and execute on Strategic Plans.



### 100+ PLANNING SESSIONS

We recognize a great plan, and the barriers to execution. Urgent work eclipses important work, the focus is on practices and not principles, and ultimately the inspiration dies. It is therefore our mission to see this trend die and guide credit unions in executing impactful strategic plans.

Questions?

## CONTACT US NOW

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1750 Edmonds Ave.  
New Lenox, IL 60451



kstang@cuxcel.com  
www.cuxcel.com



815.717.6195