

# The SunSentinel

## SPECIAL EDITION: UNFCU & INTERNAL ALIGNMENT

Vol XCIII, No. 311

Wednesday, 15 February 2017

\$1.25

### Introduction



### The Balanced Scorecard & Alignment



### Strategy Background



#### The Strategic Plan



- New strategic planning process
- 2014-2016 Strategic Plan
- Execution
- How to measure success?

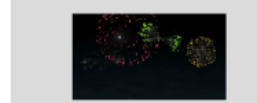
### ClearPoint & The Dashboard



### Challenges & Lessons Learned



### Questions



### Subscriptions

Rossana Creo  
AVP, Strategic Planning  
UNFCU  
rcreo@unfcu.com



### Special Edition

Today, sunny, high 80s. Tonight, cool, low 70s.  
Tomorrow, a damp start, then turning brighter,  
high 80. Weather map, Page B8.

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- Sir Winston Churchill

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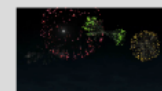
#### Challenges

- Aggressive plan
- Resistance
- Scheduling/timing
- Turnover

#### Lessons Learned

- Importance of buy-in and involvement
- Leadership: "Walk the Talk"
- There is no such thing as too much communication
- Transparency: early and often
- Compromise
- "Practice is the enemy of good strategy" - Mark Ceder
- Stay in the weeds
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# Introduction

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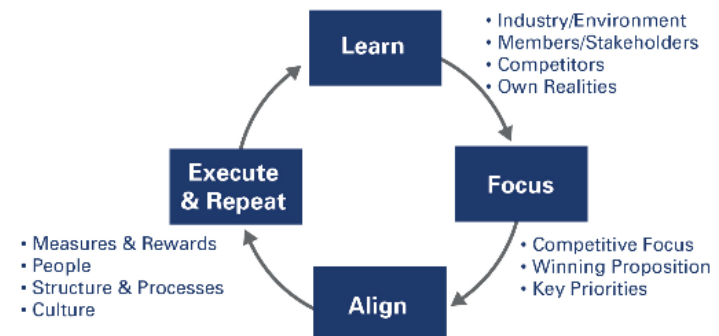




# Strategy Background



## THE STRATEGIC PLANNING PROCESS



## The Strategic Plan



New strategic planning process



2014-2016 Strategic Plan



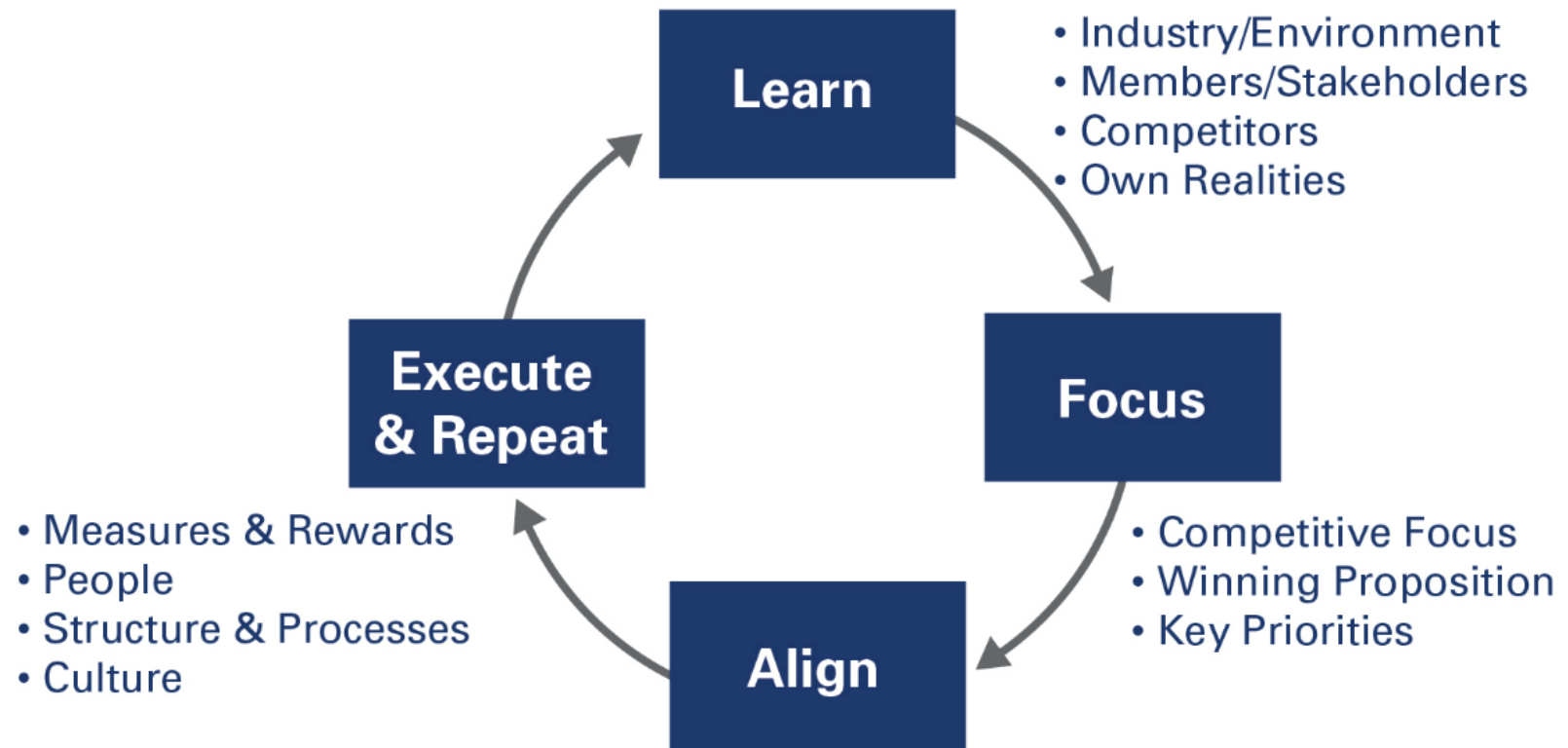
Execution



How to measure success?



# THE STRATEGIC PLANNING PROCESS



# The Strategic Plan





New strategic planning process



2014-2016 Strategic Plan



Execution



How to measure success?

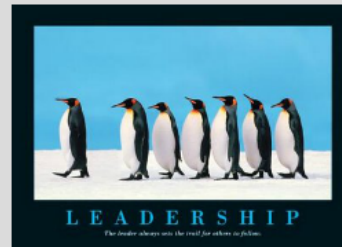
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# The Balanced Scorecard & Alignment



Communications Schedule					
Initiation & Scope	Design	Build	Test	Deploy	Post-Implementation
Project Initiation & Stakeholder Analysis					Team members are identified, resources are assigned, and the project is formally approved.
Requirements Gathering					Requirements are gathered and analyzed.
System Requirements Gathering					System Requirements are gathered and analyzed.
Software Requirements Gathering					Software Requirements are gathered and analyzed.
System Design					System Design is created and approved.
Software Design					Software Design is created and approved.
System Testing					System Testing is performed and approved.
Software Testing					Software Testing is performed and approved.
System Deployment					System Deployment is performed and approved.
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System Maintenance					System Maintenance is performed and approved.
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System Decommissioning					System Decommissioning is performed and approved.
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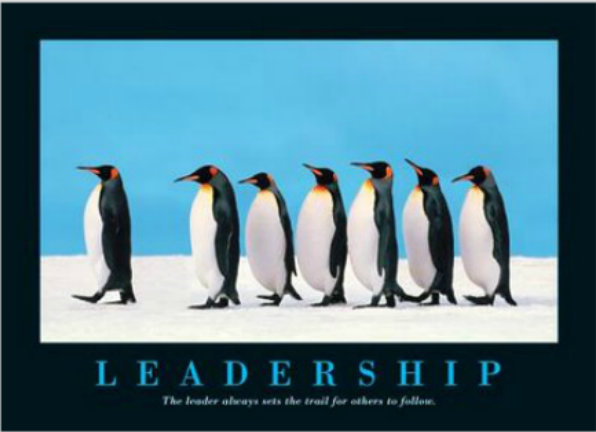
## Initiative Summary

- 13 Balanced Scorecards
  - Tier 1 - Corporate (1)
  - Tier 2 - Senior Executives (4)
  - Tier 3 - Business Units (8)
- Comprehensive strategic communications plan (STRATCOMM)
- Link to annual incentive plan
- Pros vs. Cons



“What gets measured,  
gets done.”  
- Peter Drucker





Stratcomm Activity	Sep-15	Oct-15	Nov-15	Dec-15	2016+/Comments
Board of Directors Education Session					To be included in orientation materials going forward
Quarterly Board Updates					Quarterly in 2016
Annual Board Planning Session Update					Spring 2016
Lunch and Learn Meetings and Posters					Similar to the Strategy unveiling in April 2014
Strategic Planning Council Quarterly Review Meetings					Quarterly in 2016
Leadership Summit					
Executive Briefing Reports					Monthly with constant access to software application as needed
BSC Section on Strategy Intranet Page					Updated monthly with results starting January 2016
Strategy Progress Report/Balanced Scorecard Report					Between 1Q2016-2Q2016 and annually thereafter
Podcast					New tool; proposing a trial in 1Q2016; will evaluate then.
Video					
Brochure, FAQs and Discussion Guide					
Yammer					Continuous with Comm. Team
President's Corner Message					







# LEADERSHIP

*The leader always sets the trail for others to follow.*



# Communications Schedule

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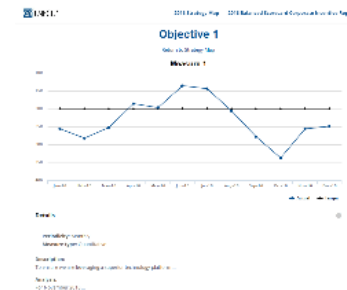
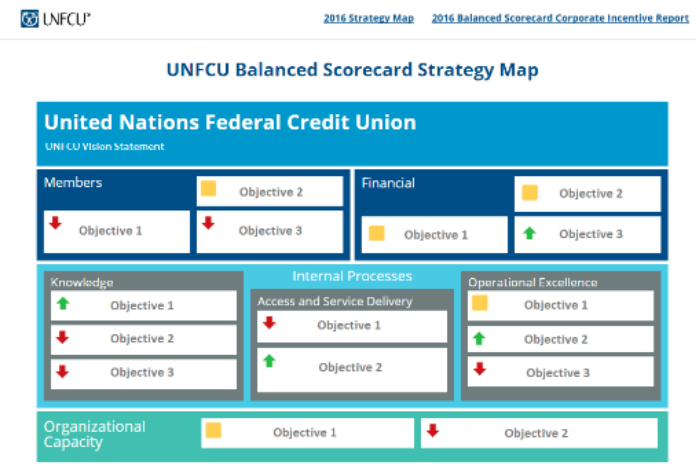
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The screenshot displays the SAP SuccessFactors Learning Catalogue View. The left sidebar shows the navigation menu with categories like Home, My Favorites, Recent, and a list of courses under 'Learning'. The main content area is titled 'Catalogue View' and shows a list of courses. The table below represents the data shown in the 'Measures' column of the table.

Process	Objectives	Measures
Introduction	Objective 1	Measure 1
		Measure 2
	Objective 2	Measure 3
		Measure 4
Introduction	Objective 3	Measure 5
	Objective 1	Measure 1
		Measure 2
		Measure 3
	Objective 2	Measure 4
	Objective 3	Measure 5
		Measure 6
Introduction		Measure 7
	Objective 1	Measure 1
	Objective 2	Measure 2
	Objective 3	Measure 3

At the bottom of the table, there are two input fields: 'Add new course' and 'Add to grid'.



☰

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🗺️ Maps

📊 Scorecards

🎯 Objectives

📈 Measures

🔒

?

YB

ClearPoint Strategy

UNFCU

< Nov-16 >

🏠 Home

★ My Favorites

📊 Scorecards

Filter Scorecards...

UNFCU Corporate Scorecard

Chief Information Officer

Chief Investment Officer

Finance SVP

Finance

General Counsel & Corporate Affairs

Human Resources

Operations SVP

Member Operations

Retail SVP

Business Development

Lending

Marketing

Training

2017 UNFCU Corporate Scorecard

Documents

Alerts & Reminders

System Settings

History

Category View

UNFCU Corporate Scorecard

★

📄

Perspectives	Objective	Measures
Member	Objective 1	↓ Measure 1
		↑ Measure 2
	Objective 2	↓ Measure 3
		↑ Measure 4
	Objective 3	↓ Measure 5
Financial	Objective 1	↑ Measure 1
		🟡 Measure 2
		↓ Measure 3
	Objective 2	↑ Measure 4
		↑ Measure 5
		↓ Measure 6
	Objective 3	↑ Measure 7
Internal Processes	Objective 1	↓ Measure 1
	Objective 2	↓ Measure 2
		↑ Measure 3
	Objective 3	↓ Measure 4

50+ rows per page

Find in grid...

UNFCU Corporate Scorecard » Scorecard » Category View

🔄





Maps ▾

Scorecards ▾

Objectives ▾

Measures ▾



YB

ClearPoint  
Strategy UNFCU

&lt; Nov-16 &gt;

Home

My Favorites

Scorecards ▾

Filter Scorecards...

UNFCU Corporate Scorec...

Chief Information Officer

Chief Investment Officer

Finance SVP

Finance

General Counsel &amp; Cor...

Human Resources

Operations SVP

Member Operations

Retail SVP

Business Developme...

Lending

Marketing

Training

2017 UNFCU Corporate S...

Documents &lt;

Alerts &amp; Reminders &lt;

System Settings &lt;

History

## Category View

UNFCU Corporate Scorecard



Perspectives	Objective	Measures
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	Objective 2	Measure 3
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Internal Processes	Objective 1	Measure 1
	Objective 2	Measure 2
		Measure 3
	Objective 3	Measure 4

50+ rows per page ▾

Find in grid...

UNFCU Corporate Scorecard » Scorecard » Category View





## Strategy Management Calendar 2016

[illegible]

## UNFCU Balanced Scorecard Strategy Map

### United Nations Federal Credit Union

UNFCU Vision Statement

#### Members



Objective 2



Objective 1



Objective 3

#### Financial



Objective 2



Objective 1



Objective 3

#### Knowledge



Objective 1



Objective 2



Objective 3

#### Internal Processes

##### Access and Service Delivery



Objective 1



Objective 2

#### Operational Excellence



Objective 1



Objective 2



Objective 3

#### Organizational Capacity



Objective 1

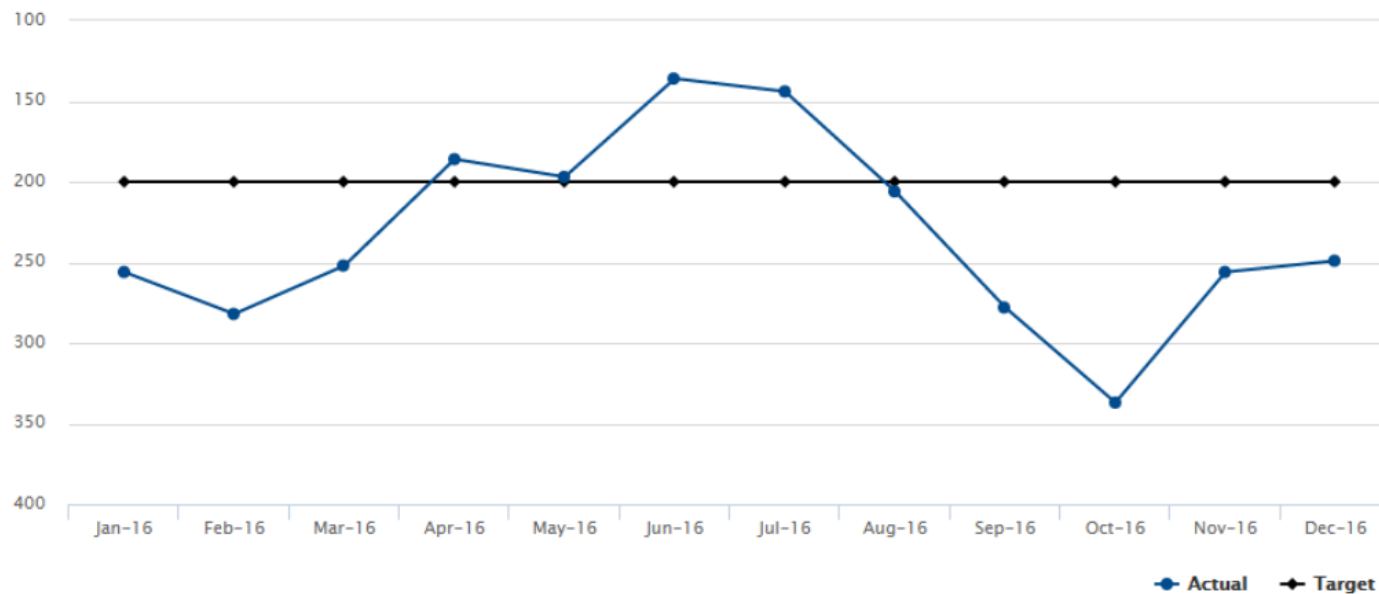


Objective 2

# Objective 1

[Return to Strategy Map](#)

## Measure 1



### Details

**Periodicity:** Monthly

**Measure type:** Quantitative

**Description:**

To ensure we are leveraging a superior technology platform ...

**Analysis:**

For November 2016 ...

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# Challenges & Lessons Learned

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## Challenges

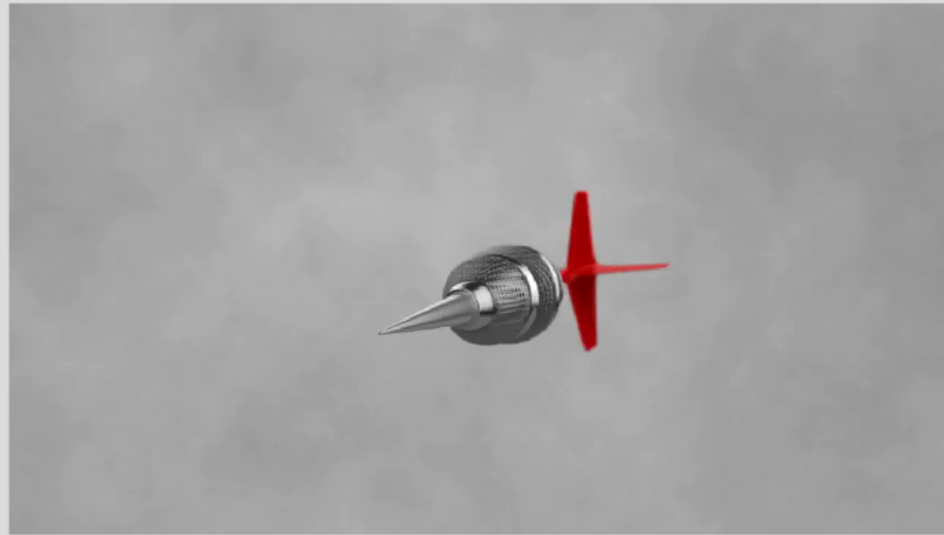
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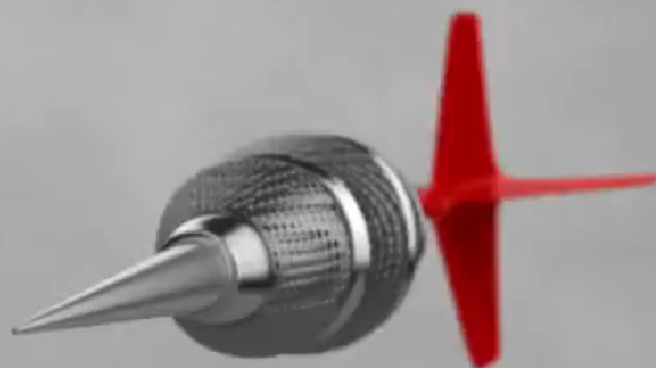


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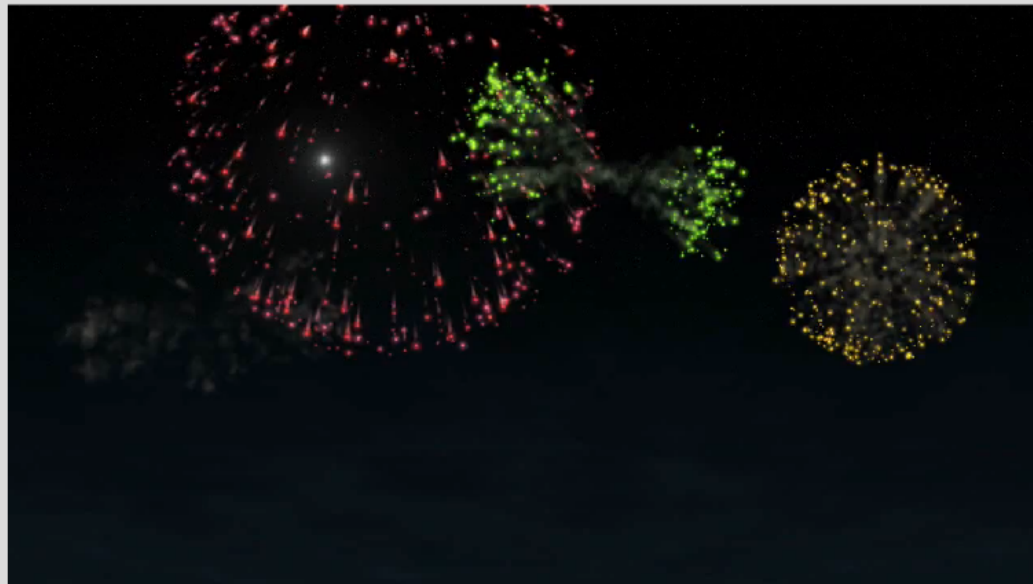
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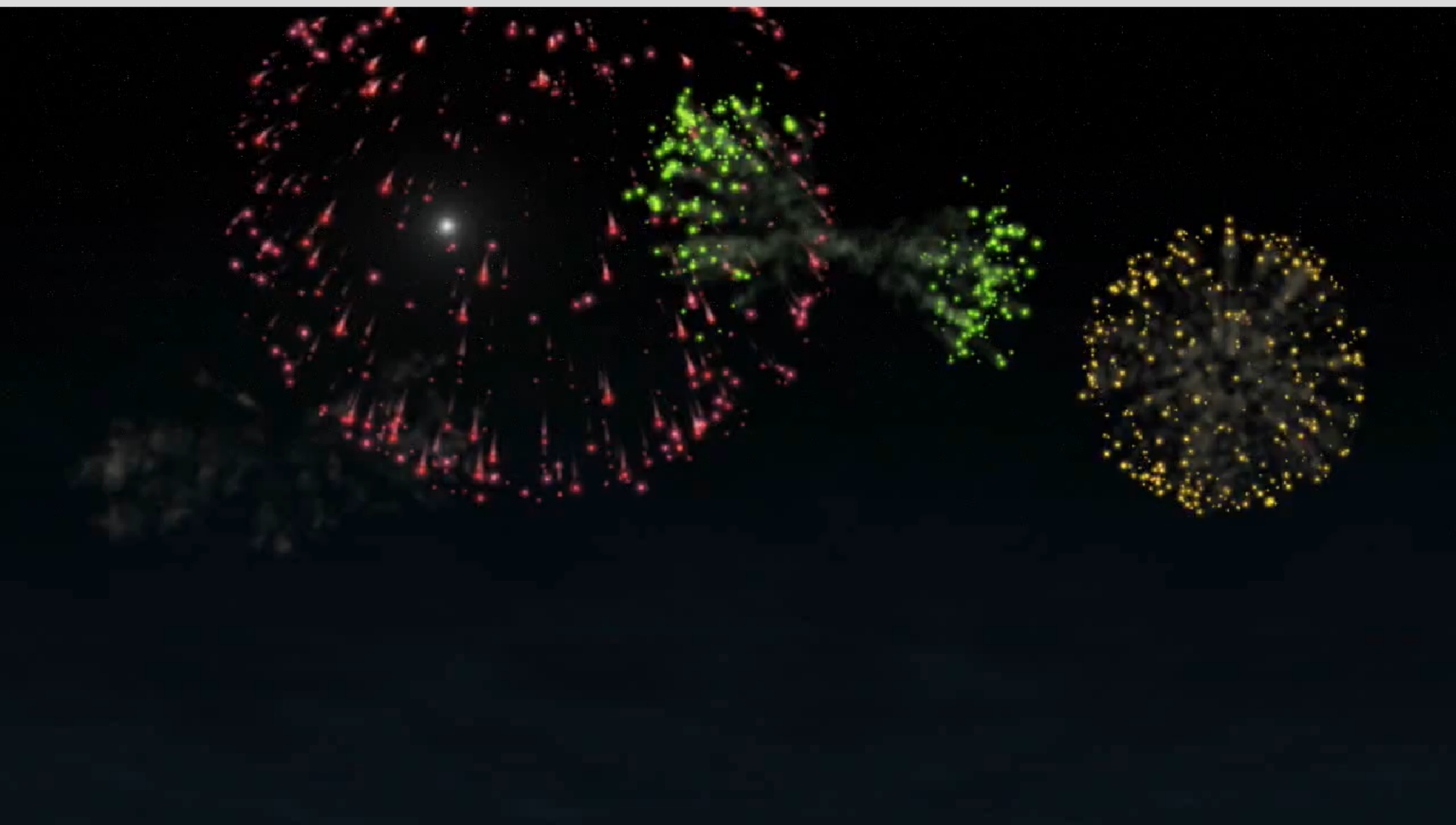


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# Questions

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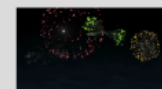
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