It’s About The **Results** We Want, Not The Initiatives We Plan

Driving Breakthrough Results & Capability In Your Credit Union, Membership & Staff
The STARTING POINT

Why Are You Here?

What Are You Looking To Gain That Will Make This Worth Your Time?
Driving The Serious Breakthroughs, Impact & Results They Need Through The Full Optimization Of Their Culture, Strategy, Capability & People
Our Industry’s Opportunities

RESULTS
TOB OBJECTIVES & STRATEGY

Our Customer’s Real Needs

The CORE
Mission, Vision, Values
Needs We Solve
Value We Offer

Aligned Accountability

TRANSFORM
FULL OPTIMIZATION OF OUR FOCUS

COLLABORATION
TRUST, EFFICIENCY & FOLLOW THROUGH

CAPABILITY
PEOPLE, PROCESS & APPROACH

EXPERIENCE
COMPLETE BUY IN & STANDARDS

Purposeful Execution

True Clarity

Copyright & TM 2014 - Total Solutions Group, Inc.
“Times and conditions change so rapidly that we must keep our aim constantly focused on the future.”

~WALT DISNEY
Core Principle #1

It Is About The **Results** We Want, Not The Initiatives We Do
80% OF ORG STRATEGIES FAIL
REALLY MOST IMPORTANT TO-DO LIST
What Is REALLY Most Important?

Part 1: What Does It All Boil Down To & What Does That Mean & Look Like?
What Is It REALLY About?

1998
6 GB Of Storage Capacity

2001
Take Up To 1000 Songs With You

Copyright & TM 2014 - Total Solutions Group, Inc.
What Do We REALLY Want?
Revolutionize By Narrowing Our Focus

1980 - 45 business units, $25.5 Billion In Revenue

Jack Welch Change Strategy - Revolutionize By Narrowing Our Focus

1. **The Core Impact** - Define what is **Really Most Important** - To continually shape the world with groundbreaking innovations that take on the world’s toughest challenges in areas of energy, health, transportation, technology, media and finance.

2. **The Core Opportunity** - Ask the critical question - Are we truly positioned to best capitalize on our strengths and future opportunities? If not why?

3. **The Critical Insight** - Evaluate and assess based on that - We are not as we are too large to adapt to changing market conditions, and that cannot be sustained moving forward.

4. **The Defining Context** - What is the critical success factor - Cash Engine - Needs to be #1 or #2 in a particular product line for them to continue in that product line

5. **The Immediate Action** - What will we now do and rally behind - We will leave any product line if not the case and create a culture that builds off of our peoples passion, vision and commitment to make a difference

2000 - 12 Business Units, $129.8 Billion In Revenue, 40 x Increase In Stock Price

Copyright & TM 2014 - Total Solutions Group, Inc.
The Organization

The Customers

The Teams/People

Cascaded Down & Back Up

The Core

What Value Does Our Organization/Teams Really Provide And What Impact Does That Create For Our Customers To What They Really Need?

1. Improvement - How Will This Help Us Be More Efficient Where We Can Get Greater Value To The Market While Increasing Quality & Turnaround Time?

2. Opportunity - What Opportunity Will This Provide For Our Employees To Take Full Ownership Of So That They Can Replicate This Going Forward For The Organization & Themselves?

3. Planning - How Does This Play With The Other Key Initiatives On Our Calendar And What Are The KPI's We Need To Track To Ensure Full Usage And Adoption Are Possible?

The Impact - How Will This Increase Revenue, Cash flow & Profitability So That We Can Reinvest In Our Customers, People And Organization?

THE Leadership Dashboard
THE Leadership Dashboard

INTTEGRATED 1-5 YEAR
Cascaded Down & Back Up

The Organization

BUSINESS-PLAN

- What Value Does Our Organization/Teams Really Provide And What Impact Does That Create For Our Customers To What They Really Need?

1. **Improvement** - How Will This Help Us Be More Efficient Where We Can Get Greater Value To The Market While Increasing Quality & Turnaround Time?

2. **Opportunity** - What Opportunity Will This Provide For Our Employees To Take Full Ownership Of So That They Can Replicate This Going Forward For The Organization & Themselves?

3. **Planning** - How Does This Play With The Other Key Initiatives On Our Calendar And What Are The KPI's We Need To Track To Ensure Full Usage And Adoption Are Possible?

The Teams/People

The Customers

The Impact - How Will This Increase Revenue, Cash flow & Profitability So That We Can Reinvest In Our Customers, People And Organization?
Application #1 - Results

INSIGHT TO ACTION
Our Industry’s Opportunities

RESULTS
TOB OBJECTIVES
& STRATEGY

CAPABILITY
PEOPLE, PROCESS
& APPROACH

Our Customer’s Real Needs

The CORE
Mission, Vision, Values
Needs We Solve
Value We Offer

COLLABORATION
TRUST, EFFICIENCY & FOLLOW THROUGH

EXPERIENCE
COMPLETE BUY IN & STANDARDS

Copyright & TM 2014 - Total Solutions Group, Inc.
Why leadership-development programs fail

This is executives #1 priority both current and future. 30% of US companies feel this is a direct reason why they have not capitalized on international opportunities.

1. Overlooking Context
2. Decoupling Reflection From Real Work
3. Understanding Mindsets
4. Failure To Measure Results
Core Principle #2

We Must Plan & Build Backwards Not Forward

Copyright & TM 2014 - Total Solutions Group, Inc.
Planning Backwards
1. **Capability-(How We Drive Results)-** Based on the Results we are committed to achieving what are the behaviors we must have overall and what does that look like at all levels of the organization?

2. **Competency/Skill- (Approach)-** What are the core competencies/skills we need them to have to drive that behavior. From that where does each person measure up and what is needed for them to get them to the next level for the organization and for their career?

3. **Responsibility/KPI (Understanding)-** What do we need to be tracking to ensure we are focused on the right things and as a result what do our people need to know to be successful about the industry, business customer and job to pull all of it together?

4. **Talent/Value Creation (Genius)-** How do they best create value and results and what talents do they bring beyond the job role that can best add value to what we need as a team/org?

5. **Passion/Emotion (Mindset)-** What are their core passions and what do we need their temperament and mindset to be with the job and team and to truly be successful?
Result - Existing Customers - Increase revenue $750,000 per qtr, Save 85% of billable hours

Capability - Become a true consultant who can fully understand and drive the value a customers REALLY wants by fully leveraging from end to end the leadership they need

Competency (Area of focus) & Agreement (The commitment)
1. Strategic Thinking - You will clearly evaluate the long-term and short-term goals of the client, our organization and our people when taking action

2. Influence - You will create buy in through a powerful balance of listening fully first, communicating clearly second

3. Negotiating - You will foster commitment that does not compromise the position for us or the value the clients really wants.

Responsibility/KPI - Really knowing their client’s business and how to customize solutions while also tracking the client’s core metrics associated with why we are there

Understanding Their Genius (How They Best Create Value) & Passions

9 Months Later - Integrated into spaced training, coaching and weekly/monthly collaborative improvement meetings. Increased revenue by $1.5 million/qtr, saved 95% of billable hours

Copyright & TM 2014 - Total Solutions Group, Inc.
Application #2 - Capability

INSIGHT TO ACTION
Please Be safe.

Do not stand, sit, climb or lean on zoo fences.
If you fall, animals could eat you and that might make them sick.
Thank you.
Core Principle #3

Real Success Starts By Truly

UNDERSTANDING & Then

Powerfully Telling THE TRUTH
At the same time, there are few CEOs who can get their heads around the notion that their main, value-added and distinguishing products are not the cars they manufacture, or credit they supply, or hotel rooms they offer, or merchandise they stock, **but the process by which consumers interact with what is being sold.**
Why That Is So Important

After 2 Weeks We Tend To Follow Through On

10% READ
20% HEAR
30% SEE
50% HEAR & SEE
70% SAY
90% SAY & DO

REFLECT & IMPROVE

Source: Cone Of Learning, Adapted From Edgar Dale, 1969

Copyright & TM 2014 - Total Solutions Group, Inc.
Their Brand Essence

We believe in unleashing the originality in every child

Free the WHAT IF?

What would a kid do?

Offer colorful wings to invisible things

Copyright & TM 2014 - Total Solutions Group, Inc.
How Do We Become The Intelligence That Runs All Computers?

*Bill Gates* - Co-Founder of Microsoft

What Are You Insanely Passionate About When It Comes To Our Company?

*What is asked of every new and existing employee of Apple*

Copyright & TM 2014 - Total Solutions Group, Inc.
Transform The Experience To Drive Results
Improving The Onboarding Process & Approach

Step 1: Focus- Drive Clarity & Accountability- 15 Days
Core Standards, 90 Day Dashboard & Scorecard, Step 1: Customer Growth/Value Training

Step 2: Understanding- See Our Value vs. Other Gyms- 30 Days
4-5 Gyms What Is Missing & What Should Change, Step 2: Entrepreneurial/Business Training

Step 3: Immersion- Become The Customer- 30 Days
The 4 Week Workout Challenge, Step 3: Functional Training

Step 4: Ownership- Drive Results- 15 Days
Prove Your Value Challenge, 90 Day Action Plan (Measurable Results & Capability)

Copyright & TM 2014 - Total Solutions Group, Inc.
Application #3 - Experience

INSIGHT TO ACTION
Our Industry’s Opportunities

RESULTS
TOB OBJECTIVES & STRATEGY

CAPABILITY
PEOPLE, PROCESS & APPROACH

Our Customer’s Real Needs

The CORE
Mission, Vision, Values
Needs We Solve
Value We Offer

Aligned Accountability

EXPERIENCE
COMPLETE BUY IN & STANDARDS

COLLABORATION
TRUST, EFFICIENCY & FOLLOW THROUGH

TRANSFORM
FULL OPTIMIZATION OF OUR FOCUS

Purposeful Execution

True Clarity

Copyright & TM 2014 - Total Solutions Group, Inc.
Driving The Serious Breakthroughs, Impact & Results They Need Through The Full Optimization Of Their Culture, Strategy, Capability & People