Purdue Federal Credit Union

Strategic Planning Matrix:

A Simple Tool Brings Metrics to Life

CASE STUDY

PFCU needed to transform their strategic planning process to a live interactive matrix

An app was built into the OnSemble Intranet framework to make updating metrics easy and goals highly visible to employees

The Strategic Planning Matrix allowed for the simple updating of metrics bringing their strategy to life

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CHALLENGE

Purdue Federal Credit Union (Purdue Federal) needed to transform their strategic planning process from an aging in-house solution to a live interactive matrix that could be easily updated and shared throughout the organization. The project was a priority, but making updates to their existing system would have required a drawn out process and assistance from the IT department. Bob Falk, Purdue Federal Credit Union's CEO, remarked on the challenges they faced:

"IT would have to routinely rebuild the metrics, rebuild dashboards, rebuild tactic lists, and then it would take IT a good deal of time to get it done because they had other projects to complete. I really didn't want to rely on someone to have make these updates. I knew exactly what I wanted to change, but I needed someone from IT to make the changes for me. It was frustrating.

Further, If Purdue Federal could clearly communicate how metrics tied back to strategy, they believed they could provide complete transparency and enable employees to take additional ownership of their work. Purdue Federal needed a develop a system that could be updated without their IT department, and they needed a system to communicate their strategies to every employee. They needed to bring their metrics to life.

SOLUTION

Purdue Federal partnered with Passageways to develop a new planning tool within their existing OnSemble Employee Intranet framework. Passageways created the Strategic Planning Matrix application that made updating information and communicating with employees across their organization simple and transparent. The Strategic Planning Matrix allowed Purdue Federal to assess ongoing metrics and create measurable goals. It made Project prioritization occur in real-time so their employees can be actively engaged with the strategic direction of the credit union.

"As the CEO, I was able to complete the entire process in less than 30 minutes. Passageways listened well. And they brought ideas that we didn't think of to the table. The developer really grasped what we were trying to do here. We ended up with a product that really showed what our needs were. Passageways helped us bring our intranet beyond where we thought possible."

RESULTS

"Managers now ask 'How did we ever live before this, how did we ever know what we were doing, How did we ever keep track of this before?' Once you build it and show them the functionality and show them how easy it is to communicate the strategy; it makes a big difference. Today, we have more engaged employees, who ask more direct questions. We used to have employees say, I didn't know we were doing this new thing. I had no idea this was coming... This tool provides complete transparency on what we are doing and enables employees to take more ownership. No longer can employees say, I didn't know this was coming or what we were doing."

After the implementation of the Strategic Planning Matrix, Purdue Federal's central challenges were solved. The Strategic Planning Matrix allowed for simple updating of their metrics and it brought their strategy to life. Having everyone on the same page reinforced the credit union's goals, their metrics tied back to their key strategy.

The Strategic Planning Matrix created a virtuous cycle. A clearly communicated strategy demonstrated the impact of employees work to the execution of Purdue Federal's strategic goals. That sharing spurred a different kind of dialog across the organization. One driven by a sense of ownership. Employees see the connections and understand how everything is tied together.

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