

**Services\***

- Strategic & Tactical Planning (Company & Departments)
- Organizational Structure and Design
- Orientation & Onboarding
- Job Descriptions
- Job Task Clarity Time Study
- Executive & Leadership Coaching
- 1:1 Check Ins / Stay Interviews
- Individual Development Plans
- Skill Building Workshops
- Succession Planning
- Exit Interviews
- Human Resource Department Audit
- Employee or Supervisor Helpline
- Workflow Process, Procedure, & Training Material Documentation

\*Not Inclusive List

**Differentiators**

- Work Smarter 4-Step Process
- Interim Business Strategist, Talent Manager & Project Implementor
- Change Management Certificate
- Talent Management Certificate
- Performance Improvement Cert.
- Hartman Profile Assessment Cert.
- Facilitation Certification
- Hogan Assessment Certification
- SBA WOSB Certification
- WBENC Certification

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STRENGTHENING COMPANIES FROM WITHIN™

## Latitude Commercial Taking A Proactive Approach To Planning & Managing Growth

### About Our Client

Latitude Commercial is a full-service commercial real estate brokerage and property management firm. They consult with developers and nationally recognized brands to find time-saving, cost-effective, flexible solutions to meet their client's current and future commercial real estate objectives.

### Project Overview

In the early stages of their business start-up, Latitude Commercial owners wanted a proactive approach to planning and managing growth. They also wanted to create a culture of collaboration and a shared sense of purpose.

Their first Strategic & Tactical Planning 3-hour session was held in 2018, with Theresa Valade facilitating. As part of the retreat, Theresa's first step was to gain clarity and focus before creating a Strategic plan. The outcome resulted in a Strategic and Tactical Planning document to provide direction and the steps to achieve the agreed-upon goals. Since then, recurring strategic retreats have been held to ensure the plan is updated to reflect the trends and issues in their marketplace. Solutions are advanced to address pressing needs as they continue to act on the tasks to support sustainability and future growth. Success Trek continues to work alongside them to support business and team member growth.

### Their Challenges

As a start-up business, the owners recognized they needed an outside perspective to help them plan and execute tasks. They wanted support in developing their team and creating procedures and systems so they could focus on sales and their core services.

More specifically, conversations were fostered to:

- Develop a Strategic Plan to establish the business's overall goals and to create a Tactical Plan with a list of actions to achieve them.
- Identify solutions to support current team members and address gaps in roles and responsibilities.
- Provide hands-on support and ongoing recommendations for continuous improvement.

## What Our Client Said

“We're really good at accomplishing goals when we get them, so it's just a matter of putting them down and focusing.” – **Aaron McDermott, President**

“It all stems back to when we started working with you. We've grown significantly and come up with different ideas and structure. So it's been very beneficial.” – **Brett McDermott, Senior Vice President**

“Your willingness to learn about what we do has been really impressive and just shows your work ethic as far as how much you actually care about making us more successful.” – **Myles Rapchak, Vice President**

“You encourage everyone to have those conversations that you may not have on a day-to-day.” – **Kayla Patrick, Marketing Director**

“Meeting with you in our yearly retreat helps us to identify where the needs are.” – **Meghan DeLaCruz, Director of Finance**

“You always have everybody thinking bigger and more – not just what's on the agenda. It's those kinds of conversations that truly guide the decisions that we make on a daily basis. I don't know how we would have done it without you; I think a little bit behind where we are now.” – **Ryne Pishkur, Director of Property Management**

## Our Actions

- Theresa facilitated a 3-hour Strategic Planning retreat in 2018, resulting in the drafting of a Strategic and Tactical Plan.
- We organized a one-to-one check-in process to support and further develop each team member.
- Created various information/instruction documents and checklists for day-to-day use for simple job tasks.
- Subsequent 3-hour strategic planning retreats (generally held annually to address the trends and issues in their market) resulted in keeping the Strategic and Tactical Plan updated and current.
- Using our organizational and leadership development expertise, we provide ongoing support and advance continuous improvement solutions.

## Collaborative Results

The work improved business strategies and empowered leaders and teams. Latitude Commercial experienced the following benefits:

- Focused goals and tasks are in motion while the plan continues to help guide decisions.
- Ability to rapidly respond to market trends and issues.
- Perform day-to-day tasks in a more manageable and efficient way.
- Defined roles and responsibilities.

## Why The Client Chose Success Trek

The CEO/President, Aaron McDermott, learned about Success Trek through a past client. After a 30-minute complimentary conversation, Aaron quickly recognized that our organization and leadership development experience could help him and his team reach their growth goals in a more mindful and manageable way.

Since 2018, Theresa and her team have continued to guide and support the Latitude group. The ongoing discussions and 3-hour strategic and tactical planning sessions provide the creative space needed to think outside the box. This resulted in improved productivity while adapting to the ever-changing economic and industry environment.

## Ready (or not) to take action?

Request a FREE 30-minute Video Chat Session. If you are unsure if Success Trek can help, work within your budget, or not sure what the problem is, this video chat session is a good fit for you.

In just 30 minutes, we:

- Get an opportunity to get to know one another
- Gain a better understanding of your needs or concerns
- Discuss ways Success Trek can help and next steps to consider
- Determine if it makes sense to work together

How To Get Started

1. Go to [www.Success-Trek.com/TakeAction](http://www.Success-Trek.com/TakeAction)
2. Enter your contact information
3. Answer a few questions