



COMPASS PERFORMANCE INC

Executive Forums

One community. Six rooms.

A confidential room of noncompeting executives who examine consequential decisions, test assumptions before they become commitments, and return accountable for what they said they would do.

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THE REALITY

The higher the responsibility, the fewer the honest rooms.

Senior leaders rarely lack information. They lack an objective place to think out loud with peers who carry comparable weight, have no stake in the answer, and will ask the question no one inside the business will ask.

What a Compass Forum is not

TYPICAL PEER GROUP

Exchange contacts

Broad membership

Polished updates

General advice

Casual follow-up

Transactional connection

COMPASS FORUM

Examine consequential decisions

Carefully curated peers

Unpolished reality

Questions and relevant experience

Explicit commitments

Trust developed over time

How every issue is processed

- 01

Analyze

Clarify the issue, the consequence, the assumptions, and the decision it requires.
- 02

Refine

Use peer questions and relevant experience to reframe the issue and test available paths.
- 03

Commit

Define the action, the owner, the timing, and the evidence of progress.
- 04

Return accountable

Report what happened, what was learned, and what happens next.

OWNER & CEO

Owner & CEO Forum

The person ultimately accountable for the enterprise rarely has a fully objective place to think out loud.

For founders, owners, CEOs, and managing partners carrying ultimate responsibility for the enterprise.

Owners and CEOs carry decisions that cannot always be processed with employees, family, advisers, investors, or the board. This room brings six to ten carefully selected, noncompeting leaders together to examine consequential issues, challenge assumptions, and convert perspective into committed action.

What comes into the room

- Enterprise direction and strategic choices
- Growth, complexity, and organizational capacity
- Founder dependence and succession
- Executive-team capability and accountability
- Capital, risk, and resource allocation
- Personal leadership, freedom, and legacy

What members leave with

- Clearer decisions on the issues that carry the most consequence
- Perspective from owners facing comparable weight
- Assumptions tested before they become commitments
- Defined actions with owners, timing, and evidence
- Trusted relationships that outlast any single quarter

ROOM

Eight- to ten-member room

STATUS

Active — Accepting two additional members

SESSION RHYTHM

Monthly two-hour facilitated working session
 Quarterly extended session or business showcase
 Accountability check on prior commitments to open every session

PRESIDENT & P&L

President & P&L Forum

For presidents, general managers, and business-unit leaders accountable for the full operating result.

A confidential room for leaders translating enterprise intent into P&L performance. Members work the tension between strategy, alignment, and sustained execution.

What comes into the room

- Competing strategic priorities
- Cross-functional accountability
- Resource allocation under constraint
- Leadership-team capability
- Succession and enterprise readiness

What members leave with

- A sharper read on which priority actually moves the result
- Perspective from peers carrying the same number
- Tested assumptions about the operating plan
- Committed actions, not intentions
- Peers who know the business well enough to challenge it

ROOM

Eight-member target

STATUS

Now forming — Founding-member conversations underway

SESSION RHYTHM

Monthly two-hour facilitated working session
Quarterly extended session or peer business review
Accountability check on prior commitments to open every session

COO & OPERATIONS

COO & Operations Forum

For chief operating officers and senior operations, supply-chain, and manufacturing executives.

A confidential room for the leaders who carry delivery. Members examine capacity, complexity, and the organizational design underneath the operating result.

What comes into the room

- Complexity that grew faster than the system
- Capacity, throughput, and constraint
- Supply-chain risk and resilience
- Operating cadence and execution discipline
- Building an operations bench that lasts

What members leave with

- A clear view of the constraint rather than the symptom
- Practical experience from operators at comparable scale
- Assumptions about capacity and cost pressure-tested
- Defined commitments with evidence of progress
- Peers to call when the plant floor argues with the plan

ROOM

Eight- to ten-member room

STATUS

Now forming — Founding-member conversations underway

SESSION RHYTHM

Monthly two-hour facilitated working session
Periodic site visits hosted by members
Accountability check on prior commitments to open every session

CFO & ENTERPRISE FINANCE

CFO & Enterprise Finance Forum

For chief financial officers and senior finance executives accountable for enterprise economics.

A confidential room for the executives who hold the economic truth of the business. Members work capital, margin, and the difficult conversations finance is expected to lead.

What comes into the room

- Margin structure and where profit actually comes from
- Capital allocation and investment discipline
- Forecasting credibility with the board and the bank
- Finance as a partner rather than a scorekeeper
- Transaction, transition, and readiness events

What members leave with

- A sharper economic read on the operating decision
- Perspective from finance leaders in comparable seats
- Assumptions in the model challenged before the board does
- Committed actions on the few things that move margin
- Peers who understand the position without translation

ROOM

Eight-member target

STATUS

Founding members being selected — First cohort forming

SESSION RHYTHM

Monthly two-hour facilitated working session
 Quarterly extended session on a single enterprise economic theme
 Accountability check on prior commitments to open every session

CHRO & PEOPLE

CHRO & People Executive Forum

For chief human resources officers and senior people executives shaping leadership and organizational capability.

A confidential room for the executives accountable for how the organization is built and led. Members work talent, structure, and the leadership issues no one else can raise.

What comes into the room

- Leadership capability and executive readiness
- Organizational design and decision rights
- Succession architecture across the enterprise
- Culture that survives growth and pressure
- Difficult conversations at the top of the house

What members leave with

- Clarity on whether the issue is the person or the design
- Perspective from people executives with comparable authority
- Tested assumptions about capability and readiness
- Committed actions with defined evidence
- A room where the executive can be candid about the executives

ROOM

Eight- to ten-member room

STATUS

Now forming — Founding-member conversations underway

SESSION RHYTHM

Monthly two-hour facilitated working session
Quarterly extended session on leadership and organizational architecture
Accountability check on prior commitments to open every session

GROWTH, COMMERCIAL & TECHNOLOGY

Growth, Commercial & Technology Forum

For commercial, growth, technology, and transformation executives accountable for where the business goes next.

A confidential room for the leaders carrying future revenue and future capability. Members examine market position, commercial architecture, and the technology decisions that shape both.

What comes into the room

- Commercial architecture and go-to-market design
- Pricing, margin, and customer selection
- Where AI creates advantage and where it introduces risk
- Transformation initiatives that stall mid-flight
- Building the capability the next curve requires

What members leave with

- A clearer view of where growth is actually available
- Perspective from leaders making comparable bets
- Assumptions about market and technology tested early
- Committed actions with owners and timing
- Peers who have already made the mistake you are considering

ROOM

Eight- to ten-member room

STATUS

Interest list open — Room composition being defined

SESSION RHYTHM

Monthly two-hour facilitated working session
Quarterly extended session on a single growth or technology theme
Accountability check on prior commitments to open every session

MEMBERSHIP

What every member commits to.

- Bring the real issue
- Attend prepared and on time
- Remain fully present
- Protect confidentiality
- Challenge with respect
- Contribute experience without prescribing
- Make clear commitments
- Return accountable

A Compass Forum is not the right room for leaders who

- Want networking or sales referrals
- Prefer polished updates over candid issues
- Cannot commit to consistent participation
- Are unwilling to challenge or be challenged
- Want the facilitator or peers to decide for them

INVESTMENT

\$400 - \$700 per month, by room and cadence

SELECTION

Membership is by invitation following a confidential fit conversation.

THE NEXT STEP

Request a confidential fit conversation.

Schedule directly: meetings.hubspot.com/steve-kopecky

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