



Mastering Strategy for Business Leaders and Managers:

Strategic Management Performance System Program



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Strategic Management Performance System

The Strategic Management Performance System (SMPS) program, offered in conjunction with Chicago Family Business Council, is an eight-month hands-on program that provides business leaders knowledge and practical tools to build a strategic plan (and execute the plan) for their companies as the program progresses. Formulating and executing a strategic plan takes immense time, energy and resources. This program combines experiential learning, peer support and expert guidance to help achieve your own and your company's goals.

This program will be delivered through 3 online self-study modules and 8 monthly face-to-face sessions.



IN PARTNERSHIP WITH:



Program Overview

The program is designed for business owners and managers to strengthen their strategic management competencies and utilize various strategic tools to help their business and themselves succeed by:

- **Leading and facilitating all phases and tasks of effective strategic planning and management**
- **Acquiring a fundamental grounding in principal developments and frameworks in the study and practice of strategic management**
- **Thinking strategically and screening opportunities that best match the core competencies of the business to deliver customer value**
- **Aligning teams and individuals behind a common vision, strategy and strategic plan**
- **Ensuring strategic priorities are aligned to strategy and designed to drive the right outcomes**
- **Bridging the gap between strategy and execution via clear accountabilities, timely communications, effective measures and cascading of strategy**
- **Leveraging an agile performance management system to guide effective decision-making**
- **Cultivating a strategy focused organization to ensure leaders and managers drive strategy formulation and execution, and strategy drives budgeting**
- **Building professional credibility including preparation for the Association for Strategic Planning (ASP) certification and maintaining project management Professional (PMP) certification**

The Strategic Management Performance System (SMPS) covers the entire strategic planning and management cycle. The program content is organized to be presented in order of occurrence if you were to “begin at the beginning”. A logical path for understanding the required (6) phases unfolds, revealing a practical strategic management process; one that is in alignment with the Association for Strategic Planning “Lead-Think-Plan-Act” Body of Knowledge guidance and professional certifications.

The program will help you identify principle developments in the study and practice of strategic management. You will develop strategic management competency and use various strategic tools to assess an organization’s environment, and formulate strategies to improve organizational performance. You will be able to translate strategies into operational terms and select and prioritize projects to drive the right outcomes. You will be able to describe the vital role performance management plays in strategy execution, while selecting performance measures that matter most. You will understand the critical role of communication and change management, and establish clear accountabilities to achieve organizational alignment.

The Project Management Professional (PMP) is a registered mark of the Project Management Institute, Inc.

Community of Practice & Learner Support

A Community of Practice via “Forum” discussion area is provided for asynchronous dialogue/networking between learners and the content team on topics and questions posted. Our current e-platforms recognize the necessity for social interaction and exploration for an enhanced adult learning experience. We provide a robust venue for learners with a common interest to interact with each other as well as with subject matter experts. We utilize a variety of e-platform functionalities to maximize learner involvement and engagement with others within their “community of practice.” For example, “listening posts” are created around targeted topics to generate and foster subject matter dialogue.

Blogs are utilized and circulated to learners to encourage ongoing interaction and reflection. Online self-assessments are utilized to help those within a “community of practice” to self-diagnose areas of strength and weakness.

The program coordinator is available (via email and phone) to provide support to learners throughout. The program content experts are available (via email, phone and scheduled online Q&A sessions) to answer questions on a 1:1 and group basis. The program provides IT technical support for the use of the “Docebo”

Who Should Attend

This program delivers “process driven” understanding and practical tools to those who currently manage or lead strategic planning and implementation along with those desiring to develop skills to take on more responsibilities tied to strategy management.

- Professionals charged with leading, managing or having responsibilities linked to development and implementation of strategy
- Owners, key employees or family members who see the need for more effective strategic management processes in their organizations.

About the Instructors



Randall Rollinson

- Co-Founder & President, LBL Strategies
- 35+ years' experience as an international educator, trainer, counselor, facilitator, author, software developer, social entrepreneur and consultant.
- Co-Author, Strategy in the 21st Century: A Practical Strategic Management Process.
- Co-Founder, Past-President, Chicago Chapter, Association for Strategic Planning
- Contributor to the growth of the Association for Strategic Planning and the certification program since its inception. ASP Registered Education Provider.
- MBA in Management, DePaul University



Doug Maris

- Vice President of Operations, LBL Strategies
- 25+ years executive leadership and strategic experience
- Strategic Management Certificate – DePaul University
- M.A. / M.Div. – Lincoln Christian University
- Adjunct faculty – DePaul University, Lincoln Christian University
- Eleven years in senior living & aging services:
 - Senior Director of Business Development
 - Executive Director & LNHA for three large CCRCs
- Six-year board member: Abraham Lincoln Memorial Hospital



Key Takeaways

- Team Strategic Management Competency Assessment
- Comprehensive study guide with all content slides
- Team-based breakout exercises for discussion and application
- Personalized feedback on all learning checks
- Toolkit with 50+ practical tools and templates
- Action items to build and execute your strategic plan
- Case studies and best practices from across the public and private sectors
- Other useful resource materials
- Certificate from the Chicago Family Business Council at DePaul University
- ASP contact hours and PMI® PDUs toward certification and re-certification

Organizational Benefits

1. Become a strategy-focused organization by cultivating practical knowledge, building skills and utilizing resources and tools in strategy management
2. Think strategically and screen opportunities effectively that best match the core capabilities and resources of the organization
3. Align workforce behind a common vision, strategy and implementation plan
4. Provide line-of-sight from enterprise-wide priorities and performance expectations down through operating units to small teams and individual employees
5. Improve leadership team's ability to communicate and manage change
6. Establish a performance management system to guide decision making
7. Manage the drivers of business success, risk factors, and mitigation strategies
8. Develop a high-level strategy management calendar for organizing the strategy management process
9. Discover low cost solutions for organizations seeking a self-help approach to growth and development

Individual Benefits

1. Build knowledge of industry standard technical model and possess the confidence to use tools to facilitate all phases and steps of planning, implementing and evaluating a managed process
2. Have the knowledge, skills and tools required to conduct a systematic assessment of the organization's current state, including customer profile and value proposition
3. Help the team identify and select the most important strategic priorities using proven assessment tools
4. Identify and prioritize the organizational capabilities and individual strategic management competencies required for the organization to be successful in the future
5. Lead a team to think strategically, while defining and communicating their desired future state, overall direction and strategic plan
6. Build and manage an effective performance management system
7. Ensure that a strong linkage exists between the organization's longer-term strategies and nearer term initiatives and projects
8. Possess the knowledge, tools and resources needed to align organizational performance and effectively support implementation
9. Earn professional credentials to build a career path

Course Outline

SELF STUDY AND PREPARATION

Prior to attending the first face-to-face session, each participant will complete three asynchronous online modules (20-30 mins each) using a variety of instructional methods, including:

- Self-paced interactive e-learning lectures
- Online assessment
- Review and practice with toolkit (individual exercises)
- Online Learning checks
- Emailing and phone with course instructors
- Online forum/chat room for content related discussions

PRE-PROGRAM ONLINE SELF STUDY MODULES

OVERVIEW

- Strategic Management: An Introduction
- Mastering Strategy SMPS Program Overview
- **Assessment:** Strategic Management Competency Assessment (for your team)

MODULE #1

PHASE 1: ASSESS AND ORGANIZE

Task 1.1: Assess Strategic Position

MODULE #2

PHASE 1: ASSESS AND ORGANIZE (CONTINUED)

Task 1.2: Organize the Program

Major Lessons (Phase I)

- Role and importance of strategic thinking
- Stakeholder communications and engagement

FACE-TO-FACE SESSIONS

Seven half-day and one full-day sessions from Jan-Aug 2019.

We use a wide variety of instructional methods including:

- Lecture with animated PowerPoint (one or two instructors)
- Large group discussion
- Case study and application work within breakout groups
- Individual or team toolkit exercises
- Video segments
- "What's wrong with this" and real-life examples
- Homework assignments to apply processes and tools with their companies following each session (representatives from the same company work as a team)
- Team presentations of homework to learning team partners
- Emailing and phone with course instructors
- Online forum/chat room for content related discussions
- Onsite facilitation services (separate fee)

SESSION 1: JAN 25, 2019 | 8 AM - 12 PM

- Welcome and Introductions
- Debrief from Self-study Work
- Review Strategic Management Competency Assessment
- Select a Strategy Champion for your organization

PHASE 2: ENVIRONMENTAL ASSESSMENT

Task 2.1: External Strategic Analysis

- **Exercise** – Strategy Canvas

Task 2.2: Internal Strategic Analyses

- **Exercise** – Core Competency

Task 2.3: SWOT (OTSW) Evaluation

- **Exercise** – Opportunities, Threats, Strengths & Weaknesses

Major Lessons (Phase II)

- Make the Investment Upfront

Homework: Conduct environmental assessment for your organization and evaluate OTSW

SESSION 2: FEB 22, 2019 | 8AM - 12PM

Team presentations of homework

PHASE 3: STRATEGY FORMULATION

Task 3.1 Strategic Direction

- **Exercise:** Assessment of Vision
- **Exercise:** Vision, Mission, Values and Goal Statements

Homework - define strategic direction for your organization

SESSION 3: MAR 22, 2019 | 8AM - 12PM

Team presentations of homework

Task 3.2 Strategy and Key Drivers of Success

- **Exercise:** Customer Value Proposition
- **Exercise:** Strategy Canvas/Porter's Five Forces
- **Exercise:** Key Drivers of Success and Intended Outcomes

Major Lessons (Phase 3)

- Effective Facilitation Techniques
- Business Canvas Model for Start-ups/New Product Launches

Homework - define high level strategy, key drivers of success and intended outcomes for your organization

SESSION 4: APR 25, 2019 | 8AM - 12PM

Team presentations of homework

PHASE 4: STRATEGIC PLANNING

Task 4.1 Strategic Plan

- **Exercise:** Strategic Objectives
- **Exercise:** Strategy Mapping

Homework - define strategic objectives and construct a strategy map for your organization

SESSION 5: MAY 31, 2019 | 8AM - 12PM

Team presentations of homework

Task 4.2 Strategic Operating Plan

- **Exercise:** KPI Design
- **Exercise:** Initiative Identification and Prioritization

Major Lessons (Phase 4)

- Nomenclature
- Shortcuts and special cases

Homework - select a strategic operating plan framework and build a strategic operating plan for your organization

SESSION 6: JUN 28, 2019 | 8AM - 12PM

Team presentations of homework

PHASE 5: STRATEGY EXECUTION

Task 5.1 Align Behind the Strategy

- **Exercise:** Cascading Objectives\OKR Exercise

Homework - cascade strategic operating plan to each department of your organization

SESSION 7: JUL 26, 2019 | 8AM - 12PM

Team presentations of homework

PHASE 5: STRATEGY EXECUTION

Task 5.2 Implement Strategic Operating Plan

- **Exercise:** Contextual Factors
- **Exercise:** Cut Before You Add

Major Lessons (Phase 5)

- Leadership of Engagement and Management of Change
- Management of Risk
- Management of Projects

Homework - build a final presentation of your strategic planning process, your strategic plan & strategy execution plan

SESSION 8: AUG 23, 2019 | 8AM - 3PM

Final team presentations

PHASE 6: PERFORMANCE MANAGEMENT

Task 6.1 Measure Performance

Task 6.2 Learn and Adapt in an Agile Way

- **Exercise:** Double Loop Learning

Task 6.3 Strategic Management as an Ongoing Process

- **Exercise:** Strategy Management Calendar

Major Lessons (Phase 6)

- Impact of Data Analytics and Predictive Analytics

Next phase: plan for strategy execution and ongoing strategy management follow-ups

Registration Details

The Chicago Family Business Council is a proud partner of the Business Families Foundation (BFF) a non-profit organization that empowers business families to ensure their sustainability and harmony for generations to come.

Through BFF, the CFBC offers curriculum known as Roots to our membership and the community at large. The courses in this curriculum allow us to dive deeper into business topics and offer relevant and engaging education.

Location

Cafe La Cave
2777 Mannheim Rd, Des Plaines, IL

Fees

First two (2) participants: \$7,000
Each additional participant: \$2,000

To register, please visit www.chicagofbc.com/events/ROOTS-SPE

For more information, please contact:

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"The real-life examples and simple tools presented in the Strategic Management Program not only give life to the theory and models, but also make it practical to implement in an organization."

Rob Salley, Director of Organizational Effectiveness
Pacific Life Insurance Company

"Despite having the right instincts and some background, I didn't have the solid structure and framework to confidently lead. [The course] surpassed my expectations, as did your personalities and teaching styles."

Andrew Yao, Future Tech & Strategy Integration Sr. Analyst
Toyota Motor North America

