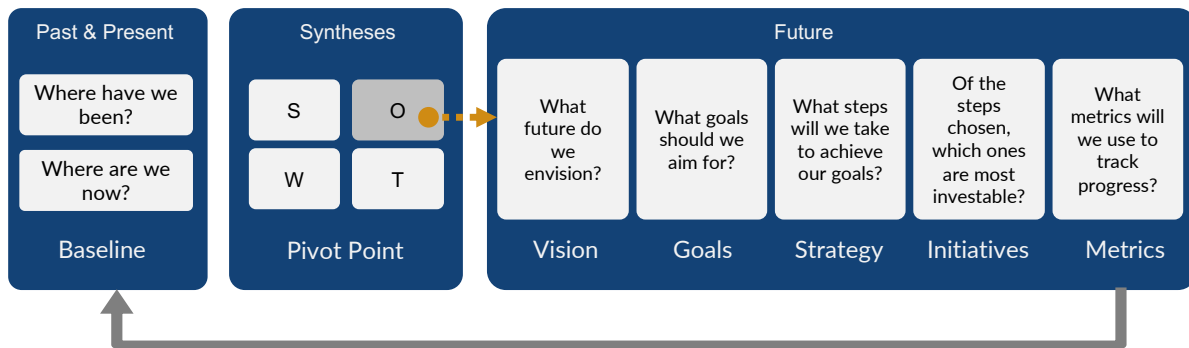


INTRODUCTION

- Most executive leadership teams assemble their strategic plans once a year and most also conduct quarterly business reviews. Yet, they are deeply concerned that many of their strategic goals are not effectively implemented (the strategy-execution dilemma).
- Many business teams embedded more deeply in the company don't always have a deep understanding of the goals and strategy or the company or the business division where they work. They're often asked to carry out instructions – and at the same time, told to think strategically and solve business problems. They may not be able to create goals and strategies that are aligned with the strategic intent of the firm.
- This is a program designed to teach the core constructs of strategy formulation and to create a hands-on experience where goals and strategies can be formulated, and for truly investable initiatives can be surfaced. The basic model for strategy formulation on which this program is based is shown below:



HOW IT WORKS

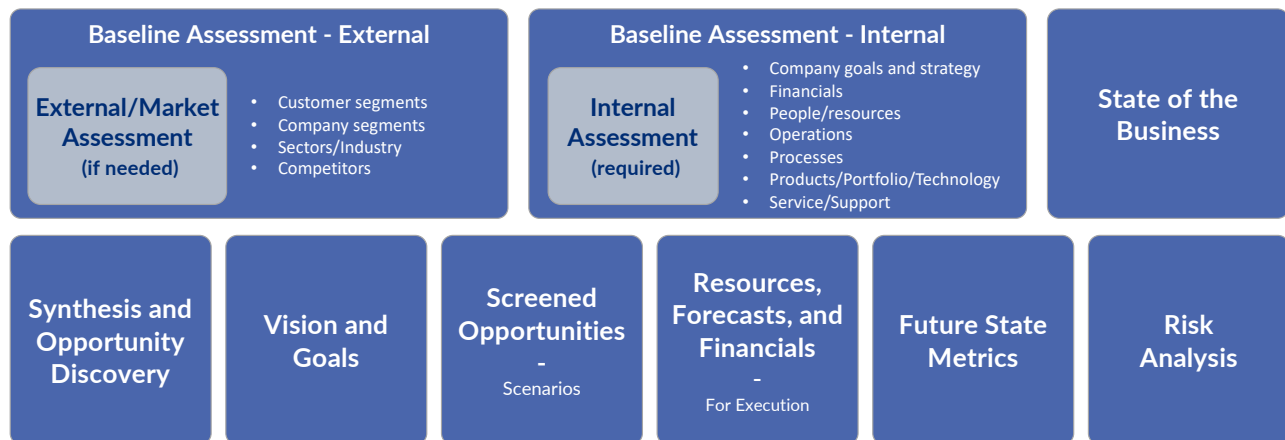
- Executives appoint teams to work on business or departmental strategy team. We meet with key stakeholders to review the program scope and ensure that teams are equipped to handle the pre-program data collection, as well as the actual work involved to prepare and present the strategy. Usually, 3-5 teams participate in any one program.
- We facilitate an interactive, 2.0 – 2.5-day workshop where the teams work on, and present various aspects of a strategic presentation. They follow a standardized template that helps them to orchestrate the flow and develop a cogent, believable story line.
- Action-Learning/Coaching: As an option, we can coach teams and review their evolving suggestions with our facilitator. Two or three 45-60-minute coaching sessions are planned so they can prepare their presentation to management. We can also return to your office to facilitate the final executive presentation.
- The program leverages the mini-book: How to Create a Winning Strategy.



WORKSHOP TOPICS

- The essence of strategy formulation
- Baseline assessments: internal and external data / past and present
- State of the business summary
- Synthesis of all data and opportunity discovery (potential use cases)
- Establish future state vision and goals – used to filter opportunities
- Articulate final opportunities and associated financial, business, and resource planning
- Agreement on metrics, risk analysis, and final execution plan
- Presentation to management

In the workshop, each module is punctuated with interactive, team-based exercises designed to reinforce current knowledge, augment understanding, and offer a challenging environment to consider the company’s higher-level goals and strategies, and to serve as a pathway to goal-setting, planning, execution, and measurement. The basic strategy presentation structure used for this program is shown below:



BENEFITS

- Builds collaborative teams whose aim is to validate strategic problems (internal or external)
- Allows teams to build a clearer path to the future and a foundation for effective prioritization
- Integrates transparently with corporate business and strategies
- Raises the level of business and financial acumen across disciplines
- Produces auditable artifacts
- Assures effective implementation and integration with the company’s operation

ABOUT BUSINESS ACUMEN INSTITUTE (BAI)

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