BUSINESS ACUMEN INSTITUTE

Course Catalog

© Business Acumen Institute

BUSINESS ACUMEN INSTITUTE

Business Acumen Institute is a growth capability firm. We partner with leadership teams to build the organizational muscle that accelerates sustainable growth. We develop three interconnected capabilities: *business acumen*, *strategic thinking*, and *product management*, while helping leaders build or fortify the infrastructure that makes them permanent.

© Business Acumen Institute LLC

Business Acumen Institute (BAI)

What We Do

We build organizational muscle through transformation programs that create lasting capability. Your leaders develop business acumen to speak the language of value creation, strengthen strategic thinking to navigate complexity and anticipate consequences, and master product management to translate strategy into revenue. Simultaneously, we help you mature your organizational infrastructure, data systems, governance, processes, and metrics, so capabilities compound and contribute to growth.

What this Unlocks

Companies that build organizational muscle break through the low growth ceiling and achieve sustained double digit growth. Decisions get made faster because governance is clear. Resources flow to the highest-value opportunities because portfolio management is transparent. Strategic initiatives execute because leaders have the capability and infrastructure to make them work.

Our product management courses are delivered through our subsidiary, Sequent Learning Networks, established over two decades ago and recognized globally for rebuilding product management as a strategic business discipline.

© Business Acumen Institute LLC

Our Courses

- Business Acumen Essentials: *Cultivate leaders who think like business owners (including product managers, marketers, engineers, HR, operations people, and others)*
- Strategic Thinking in Action: *Develop leaders who see things others miss*
- Product Management Essentials: *Build product management as a strategic discipline*
- Product Management Essentials (AI enhanced version): *Build product management as a strategic discipline while cultivating the skills needed to effectively use AI tools*
- Leading and Implementing Product Management: *Build the product management infrastructure that drives growth*
- Product Strategy and Roadmapping: *Build product strategies and roadmaps that drive results*
- How to Create a Business Case: *Build the rigor to justify strategic product and business investments*

© Business Acumen Institute LLC

Business Acumen Essentials Workshop (with certification)

Cultivate Leaders Who Think Like Business Owners

Today's imperative for emerging leaders and their teams is to think strategically, act with agility, and contribute to the company's bottom line. These leaders are encouraged to influence others, collaborate, solve problems and ensure they help the company to fulfill its strategic intent. This workshop provides the wherewithal for emerging leaders (including product managers and others) to have a greater impact on the business.

WHO IT'S FOR

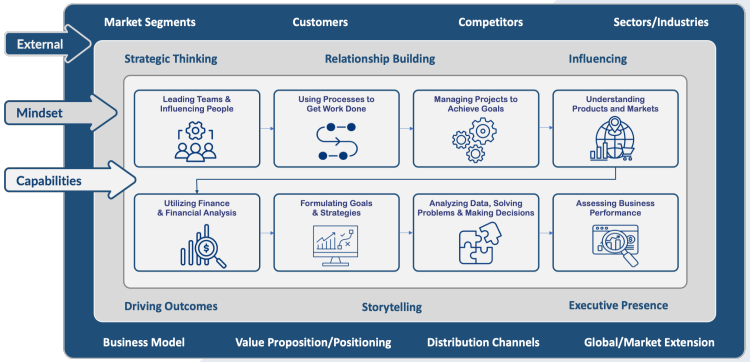
- People transitioning from individual contributor to leadership roles
- Mid-level managers who need broader business perspective
- Technical professionals (IT, engineering, project managers) making business-impacting decisions
- HR professionals who need to speak the language of business
- Product managers who need to fortify their understanding of key business constructs as shown in the Business Acumen Canvas)
- Anyone who needs to understand how businesses create value

BENEFITS:

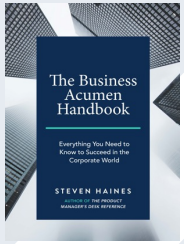
- Utilize the Business Acumen Canvas, a proprietary framework connecting strategy, customers, competition, operations, finance, and leadership
- Connect work to the strategic intent of the firm
- Interpret financial statements and understand how decisions impact the P&L
- Collaborate cross-functionally
- Understand the company's business model (how it makes money)
- Make decisions using business logic, not just functional expertise
- Communicate effectively with executives using business language
- When this program is preceded by a comprehensive competency assessment, explicit learning goals may be more easily surfaced, and the customization process may result in desired targeted content.

DELIVERY OPTIONS:

- Immersive 1 or 2-day customized corporate workshop (onsite or virtual)
- Self-paced online (approx. 3 hours)



Business Acumen Canvas



Business Acumen Essentials: Content Summary

- **Context for business acumen.** Definitions, business acumen canvas, and how business discipline drives results.
- **Leading teams and influencing people.** Breaking down silos, clarifying roles and responsibilities, building formal and informal networks, and driving team success.
- **Using processes to get work done**. Understanding workflows, identifying bottlenecks and spotting process improvement opportunities.
- **Managing projects to achieve goals.** Applying project management fundamentals while connecting people, processes, and products to strategic outcomes.
- **Understanding products and markets**. Analyzing customer needs, market dynamics and competitive forces as inputs to business and product strategy.
- **Utilizing finance and financial analysis.** Learning the essentials of budgeting, P&L structure, EBITDA, variance analysis, and recognizing performance patterns.
- **Formulating goals and strategies.** Building strategy from accurate data, establishing a strategic baseline, and identifying future opportunities.
- **Analyzing Data, Solving Problems, and Making Decisions**. Identifying data sources, uncovering problems, conducting root cause analysis, assessing and prioritizing options.
- **Assessing business performance.** Ensuring decisions, processes, and product investments align with strategic intent and drive measurable results.

BAI BUSINESS ACUMEN INSTITUTE

© Business Acumen Institute LLC

Strategic Thinking in Action (with certification)

Develop Leaders Who See Things That Others Miss

Today's imperative for mid-level to senior leaders is to navigate complexity, anticipate challenges before they become crises, and create strategies that thrive in dynamic environments. Leaders are expected to think beyond immediate problems, recognize patterns others miss, and make decisions that build sustainable competitive advantage. That's challenging when most people have never been taught how to think strategically. This workshop is for managers and leaders (regardless of function) who need to shift their perspectives from reactive problem-solvers to proactive strategic thinkers.

WHO IT'S FOR

- Mid-to-upper level managers and leaders who need to develop strategic thinking
- High-potential managers stuck in execution mode who benefit from comprehensive strategic thinking perspectives
- Product, project, and functional leaders who need to think beyond their silos
- HR professionals building strategic capabilities across leadership pipelines

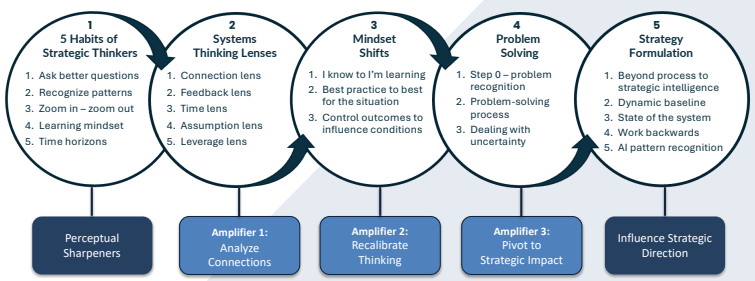
BENEFITS:

- Heighten your understanding of strategic thinking through the strategic thinking mental architecture
- See patterns and trends that others miss
- Think in systems and anticipate second-and third-order ripple effects
- Ask better questions to reveal insights and challenge assumptions
- Identify and assess problems before they become crises
- Build insight-driven strategies grounded in data and thought as an adjunct to the processes and documents of strategy formulation
- Move from tactical reactivity to proactive strategic product management

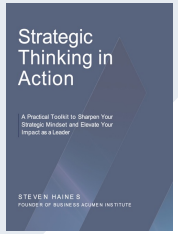
DELIVERY OPTIONS:

- Immersive 1 or 2-day customized corporate workshop (onsite or virtual)
- Self-paced online (approx. 2.5 hours)

Five interconnected *clusters of competence* that comprise strategic thinking



Strategic Thinking Mental Architecture



Strategic Thinking in Action: Content Summary

- **Context for strategic thinking.** Positioning strategic thinking within the context of the Strategic Thinking Mental Architecture. Understanding how strategic thinking amplifies business acumen.
- **Five habits of strategic thinkers.** Asking better questions, recognizing patterns, zooming in/zooming out, and examining situations across time horizons.
- **Systems thinking lenses**. Mastering five lenses for viewing various situations from differing vantage points and assessing the ripple effects across the organization.
- **Mindset shifts.** Developing the mindset shifts required to become a strategic learner. Determining what approach is best for a situation rather than relying on best practices that my not be effective for the situation.
- **Problem solving**. Ensuring that problems can be surfaced and identified to avoid solving the wrong problem. Using a proven method for conducting root cause analysis and identifying options that can solve the right problem.
- **Strategy formulation.** Linking strategic thinking methods to a company's strategic planning process. Translating data into insights. Establishing a dynamic "baseline" from which to plot the next strategic moves. Utilizing BI/AI and other analytics for recalibrating as required.

BAI BUSINESS ACUMEN INSTITUTE

© Business Acumen Institute LLC

Product Management Essentials Workshop (with certification)

Build product management as a strategic business discipline

The imperative for product managers and their teams to be nimble, strategically-oriented businesspeople is vital to company success. Modern product managers must be able to garner customer and market insights, envision a future for their products, assess opportunities, prioritize feature development, devise go-to-market programs, and manage products being sold – in dynamic, rapidly moving markets! The Product Management Essentials workshop offers a comprehensive journey across the product life cycle, guided by experts who facilitate a robust series of interactive exercises.

WHO IT'S FOR

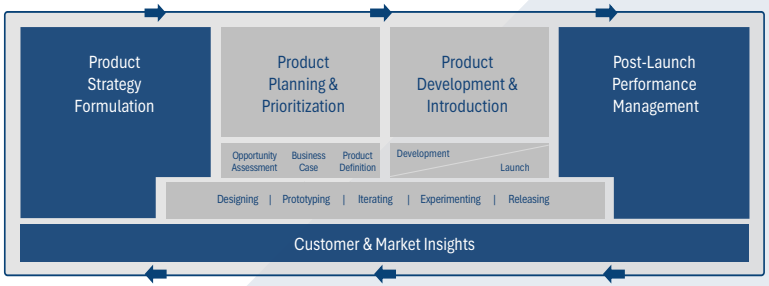
- Product managers (new or experienced) who need to earn empowerment and establish credible leadership
- Product owners transitioning from technical execution to business ownership
- Cross-functional team members who need an appreciation for the purpose of product management and the role of the product manager

BENEFITS:

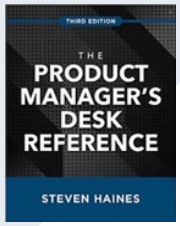
- Move from tactical reactivity to proactive strategic product management, and cultivate a business ownership mindset
- Learn the importance of managing a product's business, across the life cycle
- Build the capability to deeply understand customers, competitors, and the market environment, and how market data informs product strategy
- Develop storytelling expertise
- Translate strategic opportunities into business opportunities.
- Effectively work with development/engineering
- Launch products, or establish proper release cadences to deliver value
- Utilize data analysis tools to assess performance and recalibrate strategy
- When this program is preceded by a comprehensive competency assessment, learning goals may be more easily surfaced, and the customization process can be purposefully streamlined

DELIVERY OPTIONS:

- Immersive 2 or 3-day customized corporate workshop (onsite or virtual)
- Self-paced online (approx. 5 hours)



Product Management Life Cycle Model



Product Management Essentials: Content Summary

- **Context for product management.** Including definitions, defining the role of the product manager, collaborating with cross-functional teams, and explaining the product management life cycle model.
- **Customer and market insights.** Developing segmentation models, identifying patterns and market trends, uncovering true customer needs that translate into product strategies.
- **Product strategy formulation**. Understanding the product strategy formulation process. Identifying and presenting compelling strategic opportunities.
- **Product planning and prioritization.** Evaluating, prioritizing, and presenting (pitching) strategic opportunities. Crafting value propositions and positioning statements. Applying design thinking. Building business cases and defining product functionality, features, and usage requirements.
- **Product development oversight**. Collaborating with development teams, negotiating scope changes and trade-offs, validating product capability, and testing solutions.
- **Go-to-market protocols (launching / releasing products).** Planning product launches or establishing release cadences. Coordinating functions to ensure an on-time launch.
- **Post-launch performance management.** Establishing a data-driven, fact base to assess a product's contribution to the business. Utilizing analytical tools (BI, AI) and other methods for automating associations and identifying issues. Using variance analysis in identifying positive and negative impacts of strategic product decisions. Uncovering process improvements. Evaluating marketing mix. Recalibrating the product strategy and roadmap. Learning to discontinue or sunset a product.

BAI BUSINESS ACUMEN INSTITUTE

© Business Acumen Institute LLC

Product Management Essentials Workshop (AI Enhanced Version with Certification)

Build product management as a strategic business AI-augmented discipline

The imperative for product managers and their teams to be nimble, strategically-oriented businesspeople is vital to company success. Modern product managers must be able to garner customer and market insights, envision a future for their products, assess opportunities, prioritize feature development, devise go-to-market programs, and manage products being sold, in dynamic, rapidly moving markets! ***The enhanced AI version of Product Management Essentials*** offers a comprehensive journey across the product life cycle, guided by experts who facilitate a robust series of interactive exercises, *especially for people who want to leverage modern AI tools and techniques to enhance their work and improve productivity.*

WHO IT'S FOR

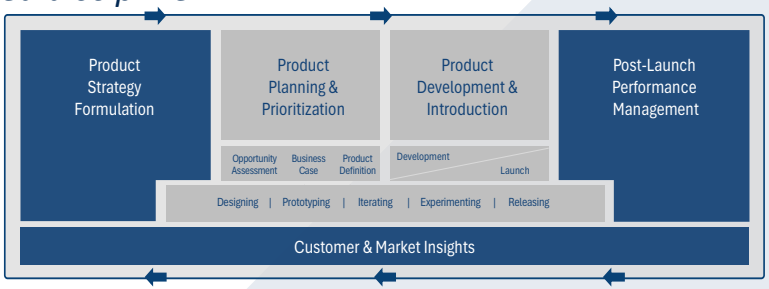
- Product managers who need to earn empowerment and establish credible leadership, and who can augment their work using AI tools
- Product managers who want to leverage AI tools for discovery, planning, business cases, forecasts, and to assess a product's contributions to the business
- Cross-functional team members who need an appreciation for the purpose of product management, the role of the product manager, and how AI is be used across the life cycle

BENEFITS:

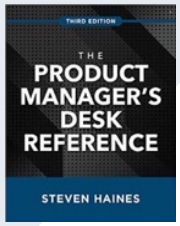
- Move from tactical reactivity to proactive strategic product management, and cultivate a business ownership mindset. Manage the product's business across the life cycle while applying AI safely and responsibly
- Build the capability to deeply understand customers, competitors, and the market environment, using traditional research *and* AI enhanced techniques
- Provide greater context around the complexity of data synthesis and analysis in the product strategy formulation using AI tools
- Effectively work with development/engineering
- Launch products, or establish proper release cadences using AI tools
- Utilize data analysis tools, AI, BI, or AI assistants to assess performance & recalibrate strategy
- When this program is preceded by a comprehensive competency assessment, learning goals are more easily surfaced, and customization is more easily achieved

DELIVERY OPTIONS:

- Immersive 3-day customized corporate workshop (onsite or virtual)



Product Management Life Cycle Model



Product Management Essentials (AI Enhanced): Content Summary

- **Context for product management in an AI-enabled world.** Including definitions, defining the role of the product manager, collaborating with cross-functional teams, and explaining the product management life cycle model. Describes how AI changes workflows, expectations, and risk considerations.
- **Customer and market insights, with and without AI.** Developing segmentation models, identifying patterns and market trends, uncovering true customer needs that translate into product strategies, and using AI tools to synthesize qualitative and quantitative inputs
- **Product strategy formulation and AI assisted analysis**. Understanding the product strategy formulation process. Identifying and presenting compelling strategic opportunities.
- **Product planning and prioritization with AI support.** Evaluating, prioritizing, and presenting (pitching) strategic opportunities. Crafting value propositions and positioning statements. Applying design thinking. Building business cases and defining product functionality, features, and usage requirements. Provides examples of how AI can refine and stress-test assumptions.
- **Product development oversight**. Collaborating with development teams, negotiating scope changes and trade-offs, validating product capability, and testing solutions.
- **Go-to-market protocols (launching / releasing products).** Planning product launches or establishing release cadences. Coordinating functions to ensure an on-time launch.
- **Post-launch performance management and AI-driven insight.** Establishing a data-driven, fact base to assess a product's contribution to the business. Utilizing analytical tools (BI, AI) and other methods for automating associations and identifying issues. Using variance analysis and AI-assisted diagnostics in identifying impacts of strategic product decisions. Uncovering process improvements. Evaluating marketing mix. Recalibrating the product strategy. Learning to discontinue or sunset a product.

BAI BUSINESS ACUMEN INSTITUTE

© Business Acumen Institute LLC

Leading and Implementing Product Management

Build the Product Management Infrastructure that Drives Growth

The challenge facing executives isn't just hiring better product managers, it's building the organizational infrastructure that enables product management to function as a strategic business discipline. Most companies struggle with inconsistent role definitions, functional silos, competing agendas, and product managers doing everyone else's work. Reorganizations and executive turnover create variability that undermines productivity and profit. This workshop is designed for heads of product, VPs, and executive leaders who need to design (or redesign) a modern product management organization that can stand the test of time. You'll develop an organizational strategy, define governance and decision rights, establish enabling practices, and create a product management manifesto or charter that aligns your leadership team and fortifies product management as the strategic engine of the business.

WHO IT'S FOR

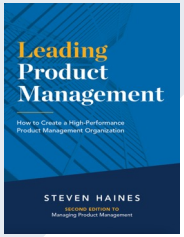
- Heads of product and product leaders responsible for product management organizations
- Executives designing or transforming product management functions
- CEOs and C-suite executives who want to optimize product management effectiveness
- Functional leaders (engineering, marketing, ops) who interface with product management

BENEFITS:

- Develop an org. vision and strategy for product management as a strategic function
- Design governance structures that clarify decision rights and reduce functional conflicts
- Establish six enabling practices: data availability, process/template management, performance metrics, management of product managers, org. alignment, & portfolio mgmt.
- Create a product management manifesto or charter that aligns executive teams
- Build talent systems that cultivate product manager talent
- Define roles and responsibilities that reduce variability and confusion
- Align product management with P&L structures and business model
- Establish a community of practice that sustains product management over time

DELIVERY OPTIONS:

- Immersive 1 or 2-day corporate workshop (onsite or virtual)
- Extended facilitated program for exec. teams [8-26 weeks to assure systemic implementation]
- Self-paced online (approx. 3 hours)



Leading and Implementing Product Management: Content Summary

- **Context for leading product management.** Understanding product management as a function (not just a role), defining organizational purpose, addressing executive concerns, and clarifying what's needed for product management to form and thrive.
- **How product management fits in the organization.** Positioning PM as the "horizontal integrative business function" that synchronizes cross-functional work, understanding the product management organizational taxonomy, and aligning the product management function with business models and P&L structures.
- **Developing an organizational strategy for product management.** Creating vision and goals for the future state of PM, identifying obstacles, assessing past reorganization impacts, and building strategic direction with clear action steps and metrics.
- **Best practice foundations.** Understanding the difference between ad hoc, better, and best practices. Learning industry-agnostic PM practices that improve efficiency, drive performance, and deliver profitable outcomes regardless of company size or sector.
- **Six enabling practices and competencies**. Establishing foundational infrastructure across: (1) data availability and management, (2) process and template management, (3) performance metrics and tracking, (4) management of product managers (talent systems), (5) organizational alignment and governance, (6) product portfolio management.
- **Product management life cycle model integration.** Connecting enabling practices to the full product life cycle (customer insights → strategy → planning → development → launch → post-launch management) to ensure practices support outcomes.
- **Implementation and action planning.** Translating organizational strategy into executable action plans with SMART goals, assigning ownership, establishing cadences, creating accountability frameworks, and developing the product management manifesto or charter for executive endorsement.

BAI BUSINESS ACUMEN INSTITUTE

© Business Acumen Institute LLC

Product Strategy and Roadmapping (with certification)

Build product strategies and roadmaps that drive results

Modern product organizations need more than delivery velocity, they need strategic clarity. Product managers are asked to "be more strategic," but most have never been taught how to construct a product strategy and roadmap from the ground up. They're expected to build roadmaps that align with company goals, prioritize using business logic, and communicate plans that engineering leaders and executives can support. This workshop teaches product managers and their teams how to convert customer insights, market intelligence, and company data into actionable, metric-driven strategies and roadmaps. Whether you're sequencing AI features, shaping multi-year plans, or running multi-line portfolios, this program builds the strategic capability that outlasts trends and frameworks.

WHO IT'S FOR

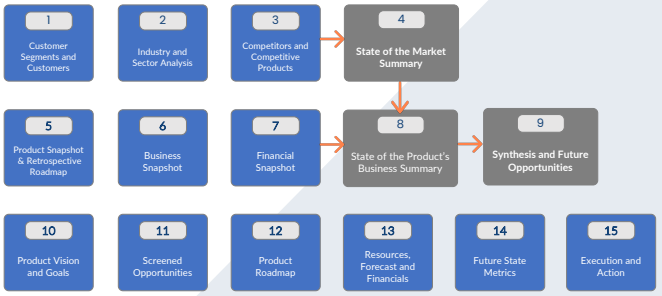
- Product managers and their teams who need to be able to construct actual product strategies and roadmaps for which they are accountable
- Product leaders managing multiple product lines and portfolio roadmaps
- Cross-functional team members (engineering, marketing, finance, operations) who contribute to, and must fulfill what's agreed upon in any product strategy and roadmap

BENEFITS:

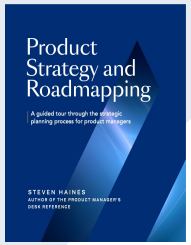
- Build product strategies and roadmaps grounded in customer and market insights, competitive intelligence, and outcomes from previously agreed-upon strategies
- Develop a repeatable, durable product strategy and roadmapping processs
- Create metric-driven strategies aligned with strategic intent executives can support
- Prepare and present actual product strategies and roadmaps to executive teams
- Master business-based prioritization and financial trade-offs across broad initiatives
- Learn the dynamic nature of strategic planning where flexibility is needed when market and other conditions change

DELIVERY OPTIONS:

- Immersive 2-day customized corporate workshop coupled with 6-10 weeks of facilitated guidance and coaching
- Self-paced online (approx. 5 hours)



Product Strategy and Roadmap Sequencing



Product Strategy and Roadmapping: Content Summary

- **Context for product strategy and roadmapping.** Understanding the Product Strategy Formulation Process (baseline → synthesis → future vision) and how the 15-step strategic planning model operationalizes this framework to create management-ready strategic presentations.
- **Establishing the baseline (past & present).** Analyzing where the product has been and where it currently stands (customer segments, industry trends, competitive landscape, product business performance, and current roadmap) synthesized into *State of the Market and State of the Product's Business* summaries.
- **Using a unique SWOT method to synthesize data and pivot to the future.** Conducting comprehensive SWOT analysis to identify the strategic pivot point where insights convert into future opportunities.
- **Defining the future (vision, goals, strategy).** Articulating what future to envision, establishing measurable goals, determining strategic direction, screening opportunities for fit, and building the product roadmap with clear priorities and sequencing.
- **Strategic initiatives and resource planning.** Identifying which strategic steps are most investable, determining required resources, timing, and financials, and *building business cases* for key initiatives.
- **Metrics and execution planning.** Establishing future-state metrics to track progress, creating execution action plans, assigning ownership, and building accountability frameworks for strategic implementation.

BAI BUSINESS ACUMEN INSTITUTE

© Business Acumen Institute LLC

How To Create a Business Case

Build the rigor to justify strategic business and product investments

Most business cases fail. Not because the ideas are bad, but because the cases lack credibility. They're built on unverified assumptions, erroneous forecasts, invalid data, or pricing models that don't align with what customers value. Executives reject them or approve them only to watch them fail. This applied learning program teaches product managers, product teams, and cross-functional leaders how to build complete, credible, data-driven business cases that earn executive approval and deliver promised results. Working in teams on actual strategic investment opportunities participants learn a repeatable 12-section framework grounded in facts, evidence, and rigorous financial analysis. This is not a conceptual workshop. Teams create real business cases, present to management, receive coaching, and refine their work until they're ready for final executive presentation. You'll leave with a defensible business case and the capability to repeat the process for future investments.

WHO IT'S FOR

- Product managers and their teams who need to justify product investments with credible business cases. Also for product line and/or portfolio leaders evaluating multiple investment opportunities across product lines

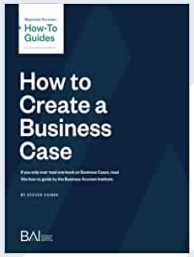
BENEFITS:

- Master a repeatable 12-section business case framework used globally
- Build complete, credible business cases with verified customer and market data, compelling value propositions, and realistic ROI
- Develop financial rigor and credibility with executives and finance teams
- Fine-tune forecasts, financials, and improve risk profiles
- Create pricing strategies that align with customer value and company profitability
- Build realistic forecasts grounded in market data, not wishful thinking
- Calculate cash flow, DCF, or, payback period,
- Present business cases confidently to executive teams with rehearsed delivery

DELIVERY OPTIONS:

- Immersive 2-day *customized* corporate workshop coupled with 6-10 weeks of facilitated guidance and coaching [we only use your company's product investment opportunities, not canned case studies]

Business Case Presentation Structure



How to Create a Business Case: Content Summary

- **Context for business cases.** Understanding why business cases don't meet goals, learning the 4 steps to a great business case (verified customer needs → creative solution → value prop with proof/price → realistic forecast/ROI), and positioning business cases as dynamic decision-making tools linked to corporate strategy.
- **Customer discovery and validation.** Developing segmentation models, uncovering true customer needs (not just stated wants), validating problems worth solving, and building cases grounded in verified customer evidence rather than assumptions.
- **Pricing strategy and revenue modeling.** Understanding what customers value, developing pricing models that balance customer willingness-to-pay with company profitability, calculating revenue with realistic unit prices and volume forecasts, and avoiding common pricing pitfalls.
- **Financial modeling and analysis.** Building complete financial forecasts with revenue projections, cost structures, margin analysis, and ROI calculations. Mastering key metrics executives examine: net cash flow, DCF, etc.,
- **Risk assessment.** Identifying business risks, market risks, execution risks, and financial risks. Quantifying probability and impact. Developing contingency plans and scenario analysis.
- **Cross-functional collaboration and storytelling.** Orchestrating team efforts across functions, integrating diverse inputs into a unified narrative, building credibility through complete/confident/credible/clear presentations, and socializing the case with management.

BAI BUSINESS ACUMEN INSTITUTE

© Business Acumen Institute LLC

Get in Touch!

Business Acumen Institute helps complex mid-cap to large-cap firms build the business discipline their leaders need to define and execute strategies that drive profitability and growth. We utilize assessments, capability-building programs, and targeted training to help clients build the organizational muscle to grow faster, drive revenue, and deliver bottom line results.

Steven Haines, founder and CEO, has authored 11 books including *The Product Manager's Desk Reference* (3rd Edition), *The Business Acumen Handbook*, *Strategic Thinking in Action, Leading Product Management, How to Create a Business Case, and Product Strategy and Roadmapping.* He has trained over 30,000 professionals across six continents and serves as Visiting Professor at Technological University Dublin

Send email to Steven: sjhaines@business-acumen.com

All corporate workshops use your actual business real financials, real strategy, real products. Customization is always included at no cost.

© Business Acumen Institute LLC

Thank you.

Business Acumen Institute
2 Main Street – Suite 508
Sag Harbor, NY 11963
+1 212-647-9100

© Business Acumen Institute LLC