

# HIGH-IMPACT STRATEGIC PLANNING

**FROM THE ABCS TO FACILITATING EFFECTIVE RETREATS AND  
DEVELOPING AND IMPLEMENTING STRATEGIC AND PERFORMANCE  
MANAGEMENT PLANS AND SYSTEMS**  
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**GOVSTRAT IS THE ONLY CARIBBEAN-BASED PROFESSIONALLY ACCREDITED PROVIDER OF RELEVANT, PRACTICAL AND BEST-IN-CLASS EXECUTIVE CORPORATE GOVERNANCE LEARNING AND DEVELOPMENT INTERVENTIONS.**

**15<sup>TH</sup> ANNIVERSARY SERIES 2018**

**8:15 AM – 4:30 PM DAILY**

COUNTRY	DATE	VENUE	COST (US\$)
JAMAICA	FRI-SAT. NOV. 9-10	JAMAICA PEGASUS	900.00
TRINIDAD AND TOBAGO	FRI-SAT. NOV. 16-17	COURTYARD MARRIOTT PORT-OF-SPAIN	900.00

## **CONTACT INFORMATION**

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***REGISTER ONLINE AT:***

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**Registration deadline is 5 working days before the event.**

**All fees must be paid prior to the date of commencement of the learning experience unless otherwise permitted.**

**ASK ABOUT OF CUSTOMISED/BESPOKE OFFERINGS IN THIS AND ANY OTHER OF OUR COURSES.**

## **GOVSTRAT STATEMENT OF QUALITY ASSURANCE**

### **WHAT SEPARATES OUR SERVICES FROM THAT OF OTHERS**

Learners at each of our workshops will benefit from the knowledge and expertise of leading international, regional and local corporate governance expert practitioners, board governance facilitators and leading academicians. Our Learning Facilitators/Consultants have in-depth knowledge and working experiences (in excess 100 years cumulatively) across the Caribbean and on Four (4) Continents while having obtained specialised and world-class education and training. They bring local governance case studies, video-clips, critical references and case laws to bear while comparing these with “best-in-class” global practices. At GovStrat, we do not apply “one size” governance model to fit all. We believe each Organisation and Leader (in the public or private sector) is unique and requires specialised attention whether through our public/advertised or bespoke learning and consulting interventions. GovStrat has the experience of training more than 7,500 Directors, Senior Managers and Government Ministers in more than twenty countries.

### **HIGH IMPACT STRATEGIC/CORPORATE PLANNING WORKSHOP**

#### **COURSE OVERVIEW:**

In today’s business environment, strategic planning and performance have never been more important. Yet research shows that many leaders and managers either don’t plan at all or lack the ability to develop the plans necessary to move their organizations from its current state to where they want it to be.

High Impact Strategic/Corporate Planning is about creating a preferred future for your organization. In this course, you will learn how to use a four-part strategic planning model used by thousands of business leaders to improve their organizational effectiveness. The model utilizes a three-year planning model developed by Dr. Vindel Kerr and supported by the Balanced Scorecard methodology developed by Kaplan and Norton (2001), and other important planning tools for ongoing performance management and evaluation. Specific references will be made to existing models used by successful Governments and private enterprises in their strategic/corporate planning approaches. Unfortunately, with no generally accepted and standardized approach in some institutions, a wide array of approaches can be found even within a single governmental domain.

Strategic performance management in which information on agency or program performance is used to assess government and private sector effectiveness and to hold managers accountable while managing for results, is now a globally relevant goal or function of most governmental and non-governmental organizations. This workshop will provide an overview of performance management systems, including their objectives, design, and basic components and requisites for effective functioning. In addition, through interactive discussions and case illustrations, workshop sessions will elucidate the practical details of how the set-up and implement a performance management system and its potential to improve efficiency and program or organizational performance.

#### **Part 1: Strategic Formulation**

During the Strategic Formulation Phase, leaders formulate the key components of their strategic plan by framing the Values, Vision, Mission, Goals, Objectives and Strategies of the Plan. It is also necessary to clarify any changes in the business and financial models needed to support the Vision over the next three years and longer.

#### **Part 2: Strategic Development**

The Strategic Development Phase begins with an assessment of the internal and external environments. It requires formal data gathering to determine the opportunities and threats facing the organization and the identification and clarification of target customers, clients, markets and stakeholders. It also involves an audit of the internal environment to identify strengths or weaknesses taking into consideration leadership style, skills, staffing, systems, structures, appropriate strategies and what shared vision is needed. Several strategic tools will be introduced and explored in assessing the internal and external environments.

### **Part 3: Strategic Implementation**

While Strategic Formulation and Development are about strategic choices and alignment, Strategic Implementation is about making it work. One of the best ways to do this is with the Balanced Score Card Approach which allows you to establish and monitor strategic objectives in four business-critical areas; finances, customers, internal systems, and learning and growth. It also allows you to set up timelines and metrics in each area to measure progress.

### **Phase 4: Strategic Evaluation**

The success of any strategic plan rises and falls on the organization's ability to continually evaluate progress and make adjustments. In this model, we use the Balanced Score Card approach to set up a 90- day evaluation program for each department, team, or business area in order to continually monitor progress and make the quality adjustments necessary to respond to both internal and external changes.

### **WHAT PARTICIPANTS WILL GAIN**

During the Strategic Development phase, leaders formulate the key components of their strategic plan by framing up the vision, mission, values, goals, and strategic objectives of the plan. It is also necessary to clarify any changes in the business and financial models needed to support the vision over the next three years.

- A thorough and permanent grasp of the 'Big Five' elements—Vision, Mission, Goals, Objectives and Strategies, and their interconnectedness
- Deeper insight and grasp on how to link corporate goals with individual performance objectives
- More in-depth knowledge on how to better able to lead their respective companies strategic planning processes
- Practical insights and ideas for increasing the successful outcomes of strategic planning initiatives such as data gathering, visioning, goal setting, implementation, and evaluation
- Common challenges and pitfalls associated with strategic planning initiatives and how to overcome both the human and organizational issues as they arise
- A proven strategic model which can be used in any size or type of organization to develop a three-year strategic plan
- Case-driven, practical, hands-on experience to sharpen your strategic planning skills
- A formal and practical review of the Balanced-Score Card methodology
- Participants will be able to improve current performance management models or design new ones to suit each unique industry or employee-category.
- Participants will be able to lead their organizations effort and coach teams around strategic performance management techniques and challenges.
  - 'Managing for Results' will be a key take-away from this Workshop—public sector entities on this path stand to gain significantly while private sector participants are bound to push the *Kaizen Management* concept (continuous improvement) even a notch higher toward 100% productivity gains.
  - Given the practical nature and hands-on approach to be employed in the delivery of the workshop, all

participants will 'get their hands dirty' in coming up with tangible solutions to real problems of strategic performance management realities.

### **WHO WILL ATTEND?**

- Presidents, CEOs, Managing Directors, General Managers, Production Managers, Heads of Departments, senior and middle-level managers in the private and public sectors;
- This workshop is also ideally suited for:
  - Strategic Planners/Corporate Planners, Performance Management Professionals senior executives, board members, private business owners who are contemplating the development of strategic plans;
  - human resource and administration professionals;
  - private and public institutions (Government Ministries, Departments and Agencies) with or contemplating the implementation of a Strategic Performance Management Plan and System;
  - Government leaders or managers responsible for strategic planning or strategic planning initiatives;
  - Department heads, managers, supervisors, and team leaders involve in strategic planning activities
- Anyone interested in improving their knowledge of strategic planning, result-based based performance management systems and the Balanced Scorecard Methodology

**DAY 1**

<b>Time</b>	<b>Session</b>	<b>Session Title</b>	<b><u>FACILITATOR</u></b>
08:00-8:15 am		Registration	<b><u>GovStrat</u></b>
8:15-8:30 am		Welcome and Introductions	<b><u>GovStrat</u></b>
8:30-8:45 am	1	Ice Breaker	<b>Dr. Vindel Kerr, Founder, GovStrat Limited</b>
8:45-9:15 am	2	Course Introduction and Overview: From Vision to Strategy Implementation	Vindel
9:15-10:00 pm	3	Key Operational Concepts: <b>The Objective Setting Process</b>	Vindel
<b>10:00-10:20 pm</b>		<b>Morning Break</b>	All
10:20am-12:30 pm	4	<ul style="list-style-type: none"> <li>• <b>The Visioning Process and Mechanics</b> –Vision, Mission, Goals, Objectives and Strategies</li> <li>• Environmental/Stakeholder Analyses</li> </ul>	Vindel
12:30-1:30 pm		<b>Lunch</b>	
1:30-3:30 pm	5	Case Study/Team Exercise #1: Building a Basic Strategic Planning Model (Based on <b>Hand-Out #1</b> )	Learners
<b>3:30-3:45 pm</b>		<b>Afternoon Break</b>	All
3:45-4:45 pm	6	Prospecting Optional Models and Analytical Tools for Strategic Planning/Performance Management Processes	Vindel
4:45-5:00 pm	7	Open Forum: Reflections	All
5:00-5:15 pm		Wrap Up and Adjournment	

**End of Day 1**

**DAY 2: THURSDAY JUNE 29, 2017**

<b>Time</b>	<b>Session</b>	<b>Session Title</b>	<b><u>FACILITATOR</u></b>
8:00-8:15 am		<b>Registration</b>	GovStrat
8:15-9:15 am	8	Introduction & Overview of the Balanced Scorecard Approach and Key Performance Management Concepts	Prof. Carolyn Heinrich
9:15-10:30 am	9	Translating Strategy into Actions and Implementation: Measuring Performance	Prof. Heinrich
10:30-10:40 am		<b>Morning Break</b>	<b>All</b>
10:40 - 12:30pm	10	Process Steps: Building a Strategy Map and other Performance Management Models	Prof. Heinrich
<b>12:30-1:30pm</b>		<b>Lunch</b>	
1:30-3:30 pm	11	<b>Case Study #2:</b> Four Groups each working on developing a simple Strategy Map for one of 4 pillars of the Balanced Scorecard	Learners and Facilitators
<b>3:30-3:45 pm</b>		<b>Afternoon Break</b>	<b>All</b>
3:45-4:45 pm	12	Preparation for a Strategic Planning Retreat and Getting it Right: Process, Elements, Execution and Aftermath	Dr. Vindel Kerr
4:45-5:00 pm	13	Open Forum	All
5:00-5:15 pm		Course Evaluation, Presentations, Wrap Up and Termination	

**End of Workshop**

## CO-FACILITATOR DR. VINDEL L KERR



Dr. Kerr is a widely-recognized scholar, expert practitioner and public policy advisor in the field of corporate governance (CG). He is a highly sought-after strategic planner (SP) and has amassed 24 years' experience with 18 at senior management level. His work history spans agribusiness, banking, consulting, corporate learning and academia. His 24-year work history has been spent in industry, research and education (in private and public sectors) spanning policy advisement and development, strategic planning, leadership development, change management, corporate finance, operations audit, business research and corporate and academic training. In industry, Dr. Kerr has held senior management positions at Capital & Credit Merchant Bank Ltd. and Jamaica Producers Group Ltd. in corporate finance, business development and international agribusiness. He obtained his early grounding with the Food & Agriculture Organization (FAO), as a Farming Systems/Farm Management Economist, in 1988.

Dr Kerr is serving as an Assistant Professor of Business Ethics at the UWI, St Augustine Campus, Trinidad and Tobago. His contribution to the field of CG includes the book, "Effective Corporate Governance: An Emerging Market (Caribbean) Perspective on Governing Corporations in a Disparate World (2005)"; doctoral thesis, "Corporate Governance Structures and Practices: Toward Policy Reform (2010)"; sole consultant who authored the "Corporate Governance Framework for Public Bodies Jamaica (2011)" and papers spanning corruption, whistleblowing and CG Codes. Dr Kerr has presented his works in Asia, Europe, Africa and the Americas.

His core expertise includes board and C-suite executives' training, performance evaluation, succession planning, accountability, effectiveness; Directors' and officers' duties; enterprise risk management, stakeholder engagement and strategic planning. Dr Kerr has served 250 corporate clients, facilitated 300+ learning sessions in 23 countries and directly or indirectly trained in excess of 8,500 Directors, C-suite executives, Corporate Secretaries, senior civil servants and Government Ministers through GovStrat Limited - a learning and management consulting firm he founded in 2003. Since 2012, Dr. Kerr has idealized, designed and been co-facilitating the Caribbean's first, most prestigious and successful program of training and accrediting Directors, Corporate Secretaries and Minute-taking professionals.

Dr. Kerr has served as chairman and director of many corporate boards and a founding advisor to the Jamaica Stock Exchange (JSE) Best Practice Competition and the Private Sector Organisation of Jamaica (PSOJ) Corporate Governance Committee -- the originator, custodian and promulgator of the PSOJ Corporate Governance Code. Dr. Kerr is a **2010 Scholar of the International Corporate Governance Network (ICGN)**; a **2010 Nominee of the Yale Law School Milstein Center for Corporate Governance and Performance Rising Star in Corporate Governance Awards**; many other scholarly, academic and community service awards which include the **British Chevening Scholarship (1995)**, **Fellow, Organisation of American States (1995) (studied for MBA)**, **First Carlton Alexander/Jamaica Agricultural Development Foundation Scholar (1989)** with which he **studied for a BSc. in Agricultural Economics & Agronomy** to study Agricultural Management; **the Agricultural Credit Bank Scholarship (1995)** and the **George Beckford Scholarship (1986) (Animal Science)**. Dr. Kerr is also the recipient of many professional and community service awards. He is a 2010 doctoral graduate in business administration (corporate governance and public policy) of University of Manchester, Alliance Manchester Business School, UK, earned an MBA from Rutgers Business School (1997), USA; a B.Sc. at UWI, St. Augustine Campus (1991), Trinidad and Tobago, and the Associate of Science Degree (ASc) (1988) in General Agriculture at the College of Agriculture, Science and Education (CASE), Jamaica.



## CO-FACILITATOR

**CAROLYN J. HEINRICH (PH.D.)**, University of Chicago) is a Professor of Public Policy and Education in the Department of Leadership, Policy, and Organizations at the Peabody College and a Professor of Economics in the College of Arts and Sciences. Heinrich's research focuses on policy, public management, performance management, education, program evaluation, workforce development and social welfare. Prior to joining the Peabody College and the College of Arts and Sciences at **Vanderbilt University**, she served as Research Professor at the Lyndon B. Johnson School of Public Affairs, University of Texas at Austin. Prior to her appointment as Sid Richardson Professor of Public Affairs and affiliated Professor of Economics and the Director of the Center for Health and Social Policy (CHASP) on July 1, 2011, she was the Director of the La Follette School of Public Affairs at the University of Wisconsin-Madison. Heinrich's research focuses on education, social welfare policy, labor force development, public management and econometric methods for program evaluation. She works directly in her research with governments at all levels, including with the federal government on evaluations of workforce development programs, with states on their social welfare and child support programs, and school districts in the evaluation of educational interventions.

Prof. Heinrich has been in collaboration with the Caribbean's leading private sector learning/consulting firm, **GovStrat Limited** in training senior public servants in performance management and nongovernmental organizations such as the **World Bank, Inter-American Development Bank, UNICEF** and others, in research to improve program and policy design and the impacts and effectiveness of economic and social investments in middle-income and developing countries. She is the past president and a founding board member of the Public Management Research Association and served as the editor of the *Journal of Public Administration Research and Theory* from January 2005 through December 2008. She also served on the Policy Council of the Association for Public Policy Analysis and Management from 2004-2007 and as its chair of the Board of Institutional Representatives through spring 2011. In 2004, Heinrich received the David N. Kershaw Award for distinguished contributions to the field of public policy analysis and management by a person under age 40, and in 2010, she and was elected to the National Academy of Public Administration. She has published more than 70 peer-reviewed books and journal articles.



## FEE STRUCTURE AND POLICY

Corporate rates are available for groups of five (5) or more learners from the same company at 10% discount.

- A. Fees include all learning aids, course material, a Certificate of Participation, refreshment breaks and lunch.
- B. Full payment or payment arrangement should be confirmed at least 10 days before carded date of the event.
- C. Registration confirmation is assured only on receipt of full payments.
- D. While we understand companies and government procurement processes and usually receive payments up-to 10 days after the event, private individuals sponsoring themselves must pay in full at least 72 hours before the event.
- E. No refund for cancellation within 5 working days of each event. Substitution of persons is allowed providing that notice is given at least 2 days before the event. No refund for “no showers” and where companies are yet to pay, full payment is expected.
- F. Only a limited number of participants will be admitted to facilitate a high level of participatory learning.
- G. The course maybe postponed or cancelled at any time without prior notice by the hosts and or organizers. In such circumstance, full refund will be made where applicable
- H. We accept corporate cheques, banker’s draft and wire transfer (bank-to-bank) in local currencies where applicable based on invoice instructions and United States Dollars.
- I. By completing and returning our registration form means you have agreed to all the terms of this Policy.

## **DELEGATE REGISTRATION FORM**

Register online at: [www.corporategovernanceadvisors.com/registration/](http://www.corporategovernanceadvisors.com/registration/)

TITLE OF WORKSHOP:			
COMPANY NAME:			
CONTACT PERSON:		JOB TITLE:	
ADDRESS:			TELEPHONE:
FAX:		E-MAIL:	
DATE TO BE HELD:		COUNTRY:	
TODAY'S DATE:			

Please register the following person(s): (Place name and position in boxes and write e-mail atop):

	<b>Email:</b> _____
<b>Representative's Name</b>	<b>Position</b>
	<b>Email:</b> _____
<b>Representative's Name</b>	<b>Position</b>
	<b>E-mail:</b> _____
<b>Representative's Name</b>	<b>Position</b>
	<b>E-mail:</b> _____
<b>Representative's Name</b>	<b>Position</b>