

HIGH-IMPACT STRATEGIC PLANNING

SUMMER SERIES 2020



**STRATEGIC PLAN DEVELOPMENT, IMPLEMENTATION AND
RETREAT FACILITATION: BALANCED SCORECARD
FACILITATION**



**BLENDED LEARNING: ONLINE AND AT
JAMAICA PEGASUS HOTEL**

DATE	TIME: EST	COST
July 24-25	9:30 AM-4:30 PM	US\$995.00 or JM\$, \$Bb or TT\$ Equiv.

CONTACT INFORMATION

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REGISTER ONLINE AT:

www.corporategovernanceadvisors.com/registration/

Registration deadline is 10 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.

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.

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 grasp of the ‘Big Five’ elements—Vision, Mission, Goals, Objectives and Strategies, and their interconnectedness
- 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.

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; 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

FEE STRUCTURE AND POLICY

1. Corporate rates are available for groups of five (5) or more learners from the same company at 15% discount
2. Fees include all learning aids, course material, a Certificate of Participation, refreshment breaks and lunch
3. Full payment or payment arrangement should be confirmed at least 10 days before carded date of the event.
4. Registration confirmation is assured only on receipt of full payments.
5. 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.
6. 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.
7. Only a limited number of participants will be admitted to facilitate a high level of participatory learning.
8. 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
9. We accept corporate and managers’ cheques, banker’s draft and wire transfer in local currencies where applicable based on invoice instructions and United States Dollars.

FACILITATORS DR. VINDEL L KERR



VINDEL L. KERR, DBA, MBA, BSC, C. DIR; PAD

Founder & Lead Corporate Governance Facilitator/Consultant, GovStrat Limited

Dr. Kerr is an internationally-recognized and award-winning expert in corporate governance and board effectiveness and a leading Caribbean professional in strategic planning. Dr. Kerr has developed a thorough grasp and working knowledge of corporate governance issues globally and is adept with the governance of State-owned Enterprises, Statutory Bodies, Hedge Funds and offshore trust and company administration. He has served as Board Chairman, chairman of audit, corporate governance and member of human resource committees of several corporate boards. His 24 years 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. Dr. Kerr has pioneered the training and development of Caribbean corporate boards in Corporate Governance, Enterprise Risk Management, Strategic Planning and Corporate Reputation Management. He has written and published the groundbreaking book, *Effective Corporate Governance: An Emerging Market (Caribbean) Perspective on Governing Corporations in a Disparate World (2005)*, seminal doctoral thesis: *Exploring Corporate Governance Structures and Practices in Jamaica: Toward Policy Reform (2010)*. Dr. Kerr has reviewed and made recommendations for strengthening of several laws and regulations, audit codes and practice and trained more than 4,500 directors of corporate boards, senior executives, permanent secretaries and government ministers in 24 Caribbean, South American and Southern African countries, through GovStrat Limited. He is the pioneer of Continuing Education for Corporate Secretaries and Their teams in the Caribbean and a global expert resource to International Institutes of Chartered Secretaries. Dr. Kerr is a **2010 Scholar of the International Corporate Governance Network (ICGN)**; **2010 Nominee of the Yale Law School Milstein Center for Corporate Governance and Performance**, **Rising Star in Corporate Governance Awards**, and a 2010 graduate of the world's #1 ranked doctoral programme in business administration (corporate governance and public policy), University of Manchester, Manchester Business School, UK. Dr. Kerr earned an MBA from Rutgers Business School (1997), USA; B.Sc. at The UWI, St. Augustine, Trinidad & Tobago (1991

CO-FACILITATOR



Rob DeRooy, B. Comm, C.Dir.

As Vice-President, Governance & Strategy at Governance Solutions Inc. (formerly known as Brown Governance Inc), Rob, a skilled presenter and teacher, brings a wealth of knowledge and experience to our clients. His expertise in corporate governance, strategic planning, member and stakeholder engagement, branding, quality (ISO) and change management and oversight is deep at both the board and executive levels. Having served both as a CEO reporting to the Board, and as a Board member on several boards, Rob has walked in your shoes and is able to see governance and strategic issues from both sides of the boardroom table. Rob has held a number of executive positions including his appointment as President of Concord Elevator where he successfully engineered a strategic restructuring, reducing overhead while increasing production and profitability. In 2001 he moved to California and assumed the duties at the international corporate level of Managing Director Concord Elevator UK and Vice President Sales Ricon Group. Rob has served on the board of the Accessibility Equipment Manufacturers Association where he chaired the membership committee, as well as on both the Brampton and Orangeville Curling Clubs. As a dedicated fundraiser within his community he has chaired fundraising committees and organized sporting events on numerous occasions, raising tens of thousands of dollars for local charities. Rob earned his Bachelor of Commerce degree at McMaster University, majoring in finance and economics.