



# Mastering Strategy for the Public Sector:

Strategic Management Performance  
System Certification Program



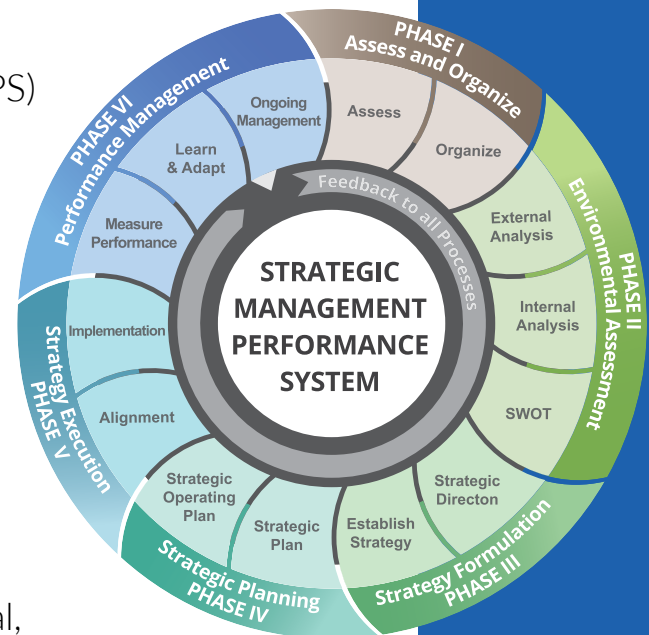
Center for Excellence  
in Public Leadership  
THE GEORGE WASHINGTON UNIVERSITY

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## Strategic Management Performance System Certification Program

The **Strategic Management Performance System** (SMPS) Certification, offered in conjunction with The George Washington University Center for Excellence in Public Leadership (GW-CEPL) is an intensive, hands-on Executive and Continuing Professional Education program designed for public sector professionals who are looking to build their competencies and skill sets in leadership and management of strategy formulation, implementation, evaluation and control. Skilled strategic planning and management professionals establish and direct disciplined approaches to planning and execution that fit their organization by being practical, sustainable and cost effective. The program is available in three formats: Live in-person; Live online; and Asynchronous self-paced online.



IN PARTNERSHIP WITH:



# Program Overview

The program is designed for public sector professionals looking to develop strategic management competencies and utilize various strategic tools to help their agencies and themselves succeed by:

- Leading and facilitating all phases and tasks of effective strategic planning and management
- Acquiring a foundation in principal developments in the study and practice of strategic management
- Thinking strategically and screening for opportunities that best match the core competencies of the agency 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 creating line-of-sight to strategy
- Leveraging an agile performance management system to guide effective decision making
- Cultivating a strategy-focused organization to ensure governance drives strategy 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) Certification 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” learning management platform.



*"Thank you very much for the course. My current job I play a central strategy role, but despite having the right instincts and some background, I didn't have the solid structure and framework to confidently lead. I was hoping this course would provide a bit of that. It surpassed my expectations, as did your personalities and teaching styles. All interactions, content, and lessons were extremely positive. One of the most tangible certification courses I've taken."*

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

*"I personally like a straightforward, logical, hence teachable approach to strategic management, which this course well provided."*

Dr. James Stewart, Collegiate Professor  
University of Maryland University College

*"I'm thoroughly enjoying this course. It's definitely the best strategic planning course I've taken over the years. Wish I'd known about it several years ago! I also wanted to let you know that I passed my Association for Strategic Planning SMP exam. I'm thrilled! No doubt your prep course was very beneficial in my preparation."*

Lisa Price, Executive Director, Office of Strategy, Planning and Performance Prince  
George's County School System

*"This course is applicable for anyone within the professional world who wants to gain a better understanding of strategic thinking."*

Linnea Musselman, Consultant  
Booz Allen Hamilton

*"Ha sido uno de los mejores programas académicos que más me ha provisto de herramientas prácticas y metodológicas, listas para usar de manera inmediata" ("This has been one of the best academic programs. It has provided me with practical tools and methodologies, ready for immediate use.")*

Ing. Miller Ruiz, Managing Director  
Thomson Global Solutions

*"LBL Strategies has been integral in building out the strategic planning, performance management and monitoring system. Without LBL ISA would only be half of what it is today."*

Craig A. Ratajczyk, CEO  
Illinois Soybean Association

*"This is the best summary presentation on strategic planning management tools and techniques that I have seen to date."*

Chris Sleath, Director Virtual Movements AFRICAME  
Campus Crusade for Christ International

*"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

*"The delivery was impressive. The tools introduced were cutting-edge. The course was very engaging and the interactive approach brought so much into the class discussions."*

Amos Olujide – Director  
Executive Dev. Centre (Nigeria)

*"I appreciated that the course was designed for busy professionals allowing me to fit it into my busy schedule."*

Amos Olujide – Director  
Executive Dev. Centre (Nigeria)

*"This program did an excellent job of helping me understand how to help clients develop strategic plans to grow their businesses. The instruction team, LBL Strategies, was very professional, seasoned and organized in their presentation of the material."*

Joy Howell, MBA, MPA, Managing Partner  
Cambridge Strategic Partners

*"The program provided an overview of strategic management along with many tools and templates. It emphasized that each organization is unique and the approach chosen for strategic management needs to fit the organization. This class has positioned me to leverage what I've learned in my work environment and I'm already finding opportunities to the tools at my company."*

Gail Farwick, Senior Director Enterprise PMO  
E.W. Scripps Company

*"I especially appreciate the program's bringing together of so many approaches and the volume of research into one, cohesive process. I'd definitely recommend this course to anyone interested in the execution side of strategy development and management."*

Blake Sheppard, Office of the CIO & Enterprise IT  
Fannie Mae

*"I would like to inform you that I have passed my Association for Strategic Planning SPP exam and am officially SPP certified. I would like to take this opportunity to thank you and the LBL team for the great and professional training provided (as well as all the help afterwards) which allowed me to pass this exam and acquire the certificate."*

Khaled Al Sakhel, Senior Investment Specialist  
Almajdouie Group Holding, Saudi Arabia

*"LBL Strategies' SMPS methodology provides the framework for us to do our work. We are adjusting where we need to make process work for us and not slow us down. As we get into a cadence of planning and executing, hand offs and report outs, we are seeing employee engagement improve, member satisfaction improved and our market retention is almost 96%."*

Catherine Peskuski, Director of Strategy  
American Veterinary Medical Association

*"I'm presently doing your Strategic Management course and thus far it is the best that I have seen as far as bridging the gap between Strategy and Execution. I am also completing my PMP at the same time and hope to apply these in my field of IT Procurement."*

Liv Medina, Strategic Sourcing / Procurement  
Melbourne, Australia



## Who Should Attend

The SMPS Certification is an Executive and Continuing Professional Education program that 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 within federal, state and local government agencies charged with leading, managing or having responsibilities linked to development and implementation of strategy
- Senior executives who see the need for more effective strategic management processes in their agency
- Professionals building a pathway to professional certification and career opportunities in strategic planning and management
- Project management professionals seeking to bridge the gap in strategy execution
- Strategic management consultants working closely with the public sector

## Instruction Team Credentials and Affiliations

The Strategic Management Performance System Certification Program is an approved exam preparation program of the Association for Strategic Planning (ASP) and delivered by ASP “Registered Education Provider” LBL Strategies. The program is offered in partnership with the George Washington University Center for Excellence in Public Leadership (GW-CEPL). LBL Strategies is a federal and state certified Veteran Owned Small Business.



# Learning Objectives

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## OVERVIEW:

1. Identify principal developments in the theory and practice of strategic management
2. Explain the differences between strategic thinking, strategic planning and strategic management
3. Explain the SMPS framework and strategic management altitude

## PHASE I:

4. Complete a high-level organizational assessment
5. Explain the rationale for selection of level and scope of the strategic planning and management start-up program
6. Prepare, design and organize a strategic planning and management start-up program
7. Describe the role that communications and change management play in the process

## PHASE II:

8. Define environmental assessment
9. Explain the rationale for conducting a comprehensive environmental assessment
10. Identify external and internal factor categories to analyze
11. Complete an external analysis, especially focused on customers and competitors
12. Complete an internal analysis, especially focused on core competency
13. Define SWOT evaluation and its component parts (Strengths, Weaknesses, Opportunities and Threats)
14. Explain the rationale for conducting SWOT evaluation as part of environmental assessment
15. Complete an "OT" then "SW" ordered SWOT evaluation process of organization opportunities, threats, strengths and weaknesses

## PHASE III:

16. Explain the rationale for developing strategic direction
17. Define strategic direction elements (i.e. Vision, Mission, Core Values, Strategic Policies and Overarching Goal(s))
18. Construct a one-page document articulating organization-level strategic direction statements
19. Define competitive positioning, especially focused on customer value proposition
20. Define key drivers of success and strategies
21. Identify key drivers of success and select core strategies
22. Explain the rationale, criteria, filter and selection process for evaluating and selecting core strategies

## PHASE IV:

23. Explain the rationale for applying a two-phase strategic planning process
24. Differentiate long-term strategic plan from short-term strategic operating plan
25. Understand and describe the structure and content requirements for a strategic plan
26. Demonstrate development of strategic objectives and strategy deployment map
27. Construct a strategic plan document
28. Understand and describe the structure and content requirements for a strategic operating plan
29. Demonstrate development of an accountability model, key performance indicators, prioritized initiatives and strategic budget
30. Explain the differences between strategic budgeting and operational budgeting
31. Construct a strategic operating plan document

## PHASE V:

32. Explain the rationale for an explicit strategy execution process
33. Understand and describe the need for and approach to communicating and rolling out the plan
34. Understand and describe the need for and approach to creating a high-performance culture
35. Demonstrate organizational and individual alignment via a process called "cascading"
36. Understand and describe leadership roles, responsibilities and capabilities required to implement a strategic operating plan
37. Understand and describe key contextual/situational factors impacting implementation
38. Demonstrate how to implement a strategic operating plan
39. Understand and describe the need for and approach to managing culture change, risk and projects

## PHASE VI:

40. Understand and describe the rationale for and scope and practice of performance management
41. Track and evaluate performance information on strategy execution
42. Assess strategic feedback through double-loop learning and adapt the plan
43. Construct a strategic management calendar to manage strategy as an ongoing process
44. Describe the roles and responsibilities of a strategy management office and a Chief Strategy Officer

## Key Takeaways

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- Organizational and Strategic Management Maturity Assessment
- Team Strategic Management Competency Assessment
- Comprehensive study guide with all content slides
- Individual and breakout exercises for discussion and application
- Personalized feedback on all learning checks
- Toolkit with 50+ practical tools and templates
- Case studies and best practices from across the public and private sectors
- Other useful resource materials
- Certification in SMPS framework
- ASP contact hours (35-40) towards certification and re-certification
- PMI® PDUs (Application as PMI REP in progress)

## Organizational Benefits

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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

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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



# Program Format

This SMPS Certification Program is currently offered as:

## **Live In-Person Boot Camp ..... 10**

» Five consecutive days or three individual stand-alone modules

## **Live Online ..... 12**

» Ten 90-minute live online sessions

## **Asynchronous Self-Paced Online ..... 14**

» Thirteen self-paced modules



# Live Face-to-Face Bootcamp Course Outline/Syllabus

## DAY ONE: OVERVIEW AND STRATEGIC ASSESSMENT

- Welcome, introductions and expectations for the course
- Program overview
- Major Lesson: Reasons strategic plan fail
- Historical perspective and Theoretical content
- Strategic Management: An Introduction
- Strategic Management Competency Assessment

### PHASE I: ASSESS AND ORGANIZE

Task 1.1: Assess Strategic Position

- **Individual Exercise** – Strategic direction assessment
- **Individual Exercise** – Strategic management gap analysis

Task 1.2: Design and Organize an Appropriate Start-up Program

- **Breakout Exercise** – Getting organized

Major Lessons (Phase I)

- Role and importance of strategic thinking in the SMPS
- Plan stakeholder communications and lay groundwork for change management

### PHASE II: ENVIRONMENTAL ASSESSMENT

Task 2.1: Conduct External Strategic Analyses

- **Breakout Exercise** – External scan

Task 2.2: Conduct Internal Strategic Analyses

- **Breakout Exercise** – Internal scan

## DAY TWO: STRATEGY FORMULATION

### PHASE II: ENVIRONMENTAL ASSESSMENT (CONT'D)

Task 2.3: Evaluate SWOT (OTSW)

- **Breakout Exercise** – Opportunities and threats
- **Breakout Exercise** – Strengths and weaknesses

Major Lessons (Phase II)

- Design strategic management information system
- Make the investment upfront

### PHASE III: STRATEGY FORMULATION

Task 3.1: Define Strategic Direction

- **Breakout Exercise** – Vision, mission, values and goal statements

Task 3.2: Establish Strategies

- **Individual Exercise** – Customer value proposition
- **Breakout Exercise** – Key drivers of success and strategies

Major Lessons (Phase III)

- Effective facilitation techniques
- Business canvas model

## DAY THREE: STRATEGIC PLANNING

### PHASE IV: STRATEGIC PLANNING

Task 4.1: Develop Strategic Plan

- **Breakout Exercise** – Strategic objectives
- **Breakout Exercise** – Strategy mapping

Task 4.2: Develop Strategic Operating Plan

- **Breakout Exercise** – KPI design
- **Breakout Exercise** – Initiative identification and prioritization

Major Lessons (Phase IV)

- Nomenclature
- Shortcuts and special cases

## DAY FOUR: STRATEGY EXECUTION

### PHASE V: STRATEGY EXECUTION

Task 5.1: Align Behind the Strategy

- **Breakout Exercise** – Cascading objectives

Task 5.2: Implement Strategic Operating Plan

- **Individual Exercise** – Contextual factors
- **Individual Exercise** – Cut before you add
- **Breakout Exercise** – 90-day action plan

Major Lessons (Phase V)

- Management of change
- Management of risk
- Management of projects

### PHASE VI: PERFORMANCE MANAGEMENT

Task 6.1: Measure performance

## DAY FIVE: PERFORMANCE MANAGEMENT AND SUMMARY

### PHASE VI: PERFORMANCE MANAGEMENT (CONT'D)

Task 6.2: Learn and Adapt

- **Individual Exercise** – Double loop learning

Task 6.3: Strategic Management as an Ongoing Process

- **Individual Exercise** – Strategy management calendar

Major Lessons (Phase VI)

- Impact of data analytics and predictive analytics

## SUMMARY

- SMPS summary
- Individual presentations
- Final certification exam instruction
- ASP Certification information
- Pathway to become a Certified SMPS trainer
- Ten questions of strategically thinking organizations

## THE SMPS CONTENT CAN ALSO BE DIVIDED INTO THREE LIVE EVENT SHORT COURSES:

### SMPS MODULE 1: FORMULATE STRATEGY IN A DISRUPTIVE ENVIRONMENT

This 2-day program has two sessions – Strategic Assessment and Strategy Formulation. The first session is designed to equip learners with the knowledge, competencies and tools required to conduct a comprehensive assessment of their organization. All organizations are well-served when their leaders understand their strategic environment and their ability to influence it. The second section focuses on direction-setting and formulation of a strategy to achieve desired outcomes. It is designed to encourage organizations to leverage a “process-driven” methodology to formulate strategies and design a roadmap that leads to achieving targeted results. A dual focus on the long-term vision and present realities are required to integrate organizational, functional, and project-level considerations.

### SMPS MODULE 2: EXECUTE STRATEGY VIA TEAM ALIGNMENT

This 2-day program is designed to provide learners with the knowledge, skills and tools to bridge the gap between strategy and operations and build organizational alignment to achieve desired outcomes. Strategy execution is a process that puts plans and strategies into action to achieve exceptional outcomes. It requires considerably more time, commitment, and resources than developing the plan itself. The role of the senior leadership in strategy execution is a central component of this program. Through this program, learners will process and apply practical skills required to drive successful execution of their strategic plan.

### SMPS MODULE 3: EVALUATE AND CONTROL STRATEGY USING MEANINGFUL MEASURES

This 2-day program is designed to provide learners knowledge, skills and tools to evaluate strategic performance and make strategy adjustments to achieve continuous improvement. Creating a performance-based culture is central to effective strategic management and sustainable growth. Learners are encouraged to build a system to interpret, analyze, and communicate performance, which then can be used to validate the plan or point to needed changes.



# Live Online Program Course Outline/Syllabus

## SESSION 1: PHASE I – ASSESS AND ORGANIZE

Welcome, introductions and program overview

Task 1 – Assess the Current State of the Organization

- Current situation and strategy
- Portfolio of offerings for performance and perceived potential
- Longer term vision of key leaders
- Strategic management gap analysis
- Strategic management competencies
- Felt need vs. actual need

Task 2 – Design and Organize an Appropriate Startup Program Based on Assessment

- Define the scope of the program
- Organize the program

Lessons Learned:

- Role and importance of strategic thinking in the SMPS
- Plan stakeholder communications and lay groundwork for change management

**Homework/Learning Partner Exercise**

**Quiz #1**

## SESSION 2: PHASE II – ENVIRONMENTAL ASSESSMENT

Task 1 – Conduct External Strategic Analyses

- Macro level trends driving your environment (PESTEL/STEEPLE)
- Micro level trends driving your environment
- Scenario planning process

Task 2 – Conduct Internal Strategic Analyses

- Core competency analysis
- Work environment analysis
- Core operations analysis
- Location and resources analysis

**Homework/Learning Partner Exercise**

## SESSION 3: PHASE II – ENVIRONMENTAL ASSESSMENT (CONT'D)

Task 3 – Evaluate SWOT (OTSW)

- SWOT (OTSW) evaluation
- Review external scan
- Review internal scan

Lessons Learned:

- Design strategic management information system
- Make the investment upfront

**Homework/Learning Partner Exercise**

**Quiz #2**

## SESSION 4: PHASE III – STRATEGY FORMULATION

Task 1 – Define Strategic Direction

- Facilitation as a critical friend
- Define vision
- Define mission
- Define values
- Define strategic policies
- Define overarching goal(s)

Lessons Learned:

- Effective facilitation techniques

**Homework/Learning Partner Exercise**

## SESSION 5: PHASE III – STRATEGY FORMULATION (CONT'D)

### Task 2 – Establish Strategy

- Define competitive positioning
- Identify key drivers of success
- Identify strategy alternatives for each key driver
- Evaluate and select core strategies

### Lessons Learned:

- Business canvas model
- Nonprofit governance roles & responsibilities

**Homework/Learning Partner Exercise**

**Quiz #3**

## SESSION 6: PHASE IV – STRATEGIC PLANNING

### Task 1 – Develop Strategic Plan

- Purpose of a strategic plan
- Suggested components of a strategic plan
- Construct a strategic plan

**Homework/Learning Partner Exercise**

## SESSION 7: PHASE IV – STRATEGIC PLANNING (CONT'D)

### Task 2 – Develop Strategic Operating Plan

- Purpose of a strategic operating plan
- Suggested components of a strategic operating plan
- Construct a strategic operating plan

### Lessons Learned:

- Nomenclature
- Shortcuts and special cases

**Homework/Learning Partner Exercise**

**Quiz #4**

## SESSION 8: PHASE V – STRATEGY EXECUTION

### Task 1 – Align Behind the Strategy

- Communication and roll-out of the plan
- Create a performance culture
- Organizational alignment
- Individual strategy alignment

**Homework/Learning Partner Exercise**

## SESSION 9: PHASE V – STRATEGY EXECUTION (CONT'D)

### Task 2 – Implement the Strategic Operating Plan

- The vital role of leaders in implementation
- Contextual/situational factors
- How to implement the strategic operating plan

### Lessons Learned:

- Management of change
- Management of risk
- Management of projects

**Homework/Learning Partner Exercise**

**Quiz #5**

## SESSION 10: PHASE VI: PERFORMANCE MANAGEMENT

### Task 1 – Measure Performance

- What is a “measure?”
- Performance measure categories
- Three levels of strategy focused performance measures
- Performance measurement process

### Task 2 – Learn and Adapt

- Double-loop learning
- Creating adaptive organizations

### Task 3 – Manage Strategy as an Ongoing Process

- Move from measurement to management
- Making strategy a continuous process

### Lessons Learned:

- Impact of data analytics and predictive analytics
- Summary

**Homework/Learning Partner Exercise**

**Final Certification Exam**

# Asynchronous Self-Paced Online Program Course Outline/Syllabus

## MODULE

## RUN TIME

History	0:06:04
Overview	0:32:31
Step 1 - Assess	0:17:14
Step 2 - Organize	0:22:45
Step 3 - External Assessment	0:25:27
Step 4 - Internal Assessment	0:10:55
Step 5 - Develop a Strategic Management Information System	0:12:44
Step 6 - SWOT Analysis	0:30:54
Step 7 - Strategic Direction	0:34:24
Step 8 - ID Alternatives	0:38:56
Step 9 - Select Strategies	0:21:00
Step 10 - Develop the Strategic Plan	0:36:00
Step 11 "Part 1" - Develop a Strategic Operating Plan	0:51:12
Step 11 "Part 2" - Develop a Strategic Operating Plan	0:31:50
Step 12 "Part 1" - Implement a Strategic Operating Plan	0:32:15
Step 12 "Part 2" - Implement a Strategic Operating Plan	0:30:07
Step 13 - Evaluation and Ongoing Management	0:46:15
<b>TOTAL</b>	<b>8:00:33</b>

## MODULES 1 & 2: OVERVIEW, ASSESS AND ORGANIZE

Lay the groundwork for understanding and successfully applying a strategic management process. Topics include:

- History and terminology of strategic management
- Assessing current strategic direction's level of development
- Assessing current strategic management capabilities
- Factors influencing the nature/scope of the strategy development program
- Benefits, concerns, time frames, participants and start up activities for strategic planning
- Organizing a "team-based" strategy formulation/change management process that fits your organization

## MODULES 3 - 6: ENVIRONMENTAL ASSESSMENT

Outline and describe the process of environmental assessment analysis and evaluation, the essential prerequisite for the development and implementation of an effective organization strategy. Topics include:

- Conducting an environmental scan "external analysis" of the operating environment
- Conducting an environmental scan "internal analysis" of the organization
- Conducting a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats)
- Designing a system for strategic information management
- Evaluating the results of the strategic analyses

## MODULES 7 - 9: STRATEGY FORMULATION

Build on the environmental analyses and evaluations to develop an overall strategic direction, identify and select a set of preferred strategies and chart a course sufficiently explicit to guide and motivate the board, management and staff of an organization. Topics include:

- Defining vision - destination
- Defining mission - purpose
- Articulating values - beliefs
- Clarifying policies - guidelines
- Developing goals - key themes of the plan

Once elements of strategic direction are defined, proceed with:

- Compiling and screening strategy alternatives
- Evaluating feasible alternatives
- Selecting preferred alternatives
- Integrating current strategic initiatives with newly proposed strategic initiatives



## MODULE 10 - 11: STRATEGIC PLANNING

Development of a written strategic plan that integrates alternatives in a coherent long-range plan is required to serve as the basis for leading and managing an organization in the future. While always subject to modification, a strategic plan is the best statement of the goals and aspirations that a leadership team can devise for the foreseeable future. Convert the longer-term strategic plan and prioritized strategies into a detailed blueprint for action. Development of a detailed set of operational objectives, performance measures, and projects is required to move the strategic plan into a coordinated set of actions. This includes the assignment of roles and responsibilities for implementation and the commitment of authorized resources. Topics include:

- Identifying relationships between strategic planning and operational planning
- Identifying the prerequisites of effective strategic planning
- Selecting the appropriate organization structure for each strategic initiative
- Evaluating the organization's existing strategic plan
- Developing a revised strategic plan
- Developing ancillary strategic planning processes
- Discussing an illustrative strategic plan
- Identifying the strategic operating plan as defined in the strategic plan
- Assessing compatibility of the strategic operating plan with current planning processes
- Deploying the strategies into the organization via a balanced set of objectives across functions
- Learning to use a strategy deployment map
- Identifying key performance measures and performance targets
- Formatting strategies for implementation
- Obtaining approvals and authorizations for the strategic operating plan
- Distributing and communicating the strategic operating plan to members of the implementation team

## MODULE 12: STRATEGY IMPLEMENTATION

Understand senior executive, manager and staff level roles and responsibilities understood to be part of and happening within change management activities and processes linked to strategy implementation. Focus on how to align the team and integrate the strategic implementation plan with on-going operations.

Implementation is considered in two phases:

- Short-term Implementation Phase - Coinciding with the annual (or equivalent) operating cycle
- Long-term Implementation Phase - When implementation becomes the responsibility of line management

## MODULE 13: PERFORMANCE MANAGEMENT

Understand dynamics at play in implementation as a continuous "change management" process. Requirements for achieving team alignment, managing expectations and feedback on the results of implementation management are required. Topics include:

- Practical application/ next step use of strategic management skills, tools and processes to install and integrate a strategic implementation plan
- Key factors of adjustment to the emerging changes in the strategic direction and changes throughout the organization culturally from enterprise down to the individual level
- Human dynamics to implementation management...what to watch out for when working with an organization
- Example challenges to rolling out implementation - Difficulties encountered in organizations where the changes initiated in previous years are not yet fully integrated and operational, resulting in an understandable resistance to a new wave of strategic thinking and planning



# Frequently Asked Questions

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## Are books included in the tuition fee?

No, books are not included. The course text "Strategy in the 21st Century: A Practical Strategic Management Process" (Rollinson and Young, 2010), is purchased online or contacting LBL Strategies.

## Will there be quizzes or tests?

Yes, there are learning recognition quizzes and a comprehensive final exam completed during the program. The program quizzes are completed as ungraded learning recognition exercises. The program final exam is a graded instrument with a passing score of 75% (or higher) to successfully complete the program and receive your SMPS Certification.

Quiz and final exams are completed online. Quiz and final exam questions are multiple choice items responded to open note and must be completed in one sitting. The instruction team provides feedback to learners on all incorrect responses.

## Can I learn continuing education/professional development credits with this program?

Yes, but you will need to confirm this with your employer as they will have the relationship, as an organization, with an independent certifying body. Check with your Human Resources department to confirm this along with approval for tuition reimbursement.

## How long do I have to complete the program?

For the online programs, you have twelve weeks to complete the program and an additional 30 days to complete the final exam. For the live face-to-face Boot Camp program, you too have 30 days to complete the final exam.

## If I have questions during the program who do I speak with?

Learners have access to the program instructor and coordinator via email and direct phone. We encourage our learners to be in touch with concerns and questions on learned content and tools being provided as it relates to their work situation and organization. We consider this an important professional level engagement because often learners in the program are also working in this field (or desire to be). It is typically in the aftermath of these discussions where learning (yours), planning tools we provide you and personal confidence (yours) come together and can be applied successfully.

## When and where do I register?

It's recommended you register no later than one week prior to the program registration deadline to receive a program orientation, have time to conduct the pre-course assessments, complete first reading assignment and establish access to course materials in the learning management system.

## For more information, please contact:

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