

STRATEGIC OVERSIGHT CERTIFICATION

THE OVERSIGHT ROLE OF THE BOARD IN STRATEGY

OVERVIEW

The need for strategic thinking in every sector (for profit, not-for-profit, charitable, government agencies) has never been greater. Every industry today is experiencing massive disruptive change. Accordingly, surrounded by all this change and turmoil, the single biggest challenge facing Boards of Directors is to oversee both their organization's planning process and management's strategic thinking...amid chaos!... and in so doing help them avoid the costly mistakes that can put their organization at risk and send careers spiraling. In their role as "governors", directors are charged specifically with the responsibility to ensure that their organization's assets are safeguarded and that the best possible decisions are being made by management. Nowhere is ensuring the quality of decisions more important for a board than when it comes to reviewing and approving the strategy of their organization. It represents one of the single most important decision any organization can make.

PROGRAM STRUCTURE

The Strategic Oversight Role of the Board Program consists of 4 on-line modules of approximately 3.5 hours in duration each delivered live by one of the world's leading strategy and governance experts, Dr. Chris Bart. The program content is applicable to all type of organizations, across all industry sectors and jurisdictions, with a focus on the practical, hands on role of the board in their Strategic Oversight role. Best of all, when you pass the qualifying 'Certification Exam' at the end of the program, you will earn the right to use the prestigious "S.O.C" designation after your name, thereby signalling your commitment to excellence in governance.

AFTERNOON: 1:30 p.m. - 5:00 p.m. OR EVENINGS: 6:00 p.m. - 9:30 p.m.

The 4 modules leading to the Strategic Oversight Certification Programs are:



1.
**THE ROLE OF THE
BOARD IN STRATEGY**



2.
**SMART OBJECTIVES AND
THE MVVO SCORECARD
&
PROGRAMS, SERVICES, &
PRODUCTS DECISIONS**



3.
**GROWTH ALTERNATIVES
AND TYPES OF
ACQUISITIONS**



4.
**THE STRATEGY EXECUTION
CHALLENGE**

WHO SHOULD ATTEND?

This course is intended for **board members** and **senior executives** of any organization. It can be applied to most industries and enterprises of varying sizes.

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PROGRAM CONTENT

1. THE ROLE OF THE BOARD IN STRATEGY

What is Strategy and why is it so important from a governance standpoint?

The *Purpose Driven* Organization

- The Mission Statement: The Essential Strategy Starting Point
 - The Mission Workshop
- The Vision and Values Statements
 - What is a Vision Statement?
 - What is a Values Statement?
 - The Vision/Values Workshop?
- Strategic Goals: How “strategic priorities” should ALWAYS be chosen
- STRAT-PLAN EXAMPLES

3. GROWTH ALTERNATIVES AND TYPES OF ACQUISITIONS

- Growth alternatives and types of acquisitions
 - Strategic Risk Analysis
 - How to identify and assess risk
- THREE CASES for discussion

2. SMART OBJECTIVES AND THE MVVO SCORECARD PROGRAMS, SERVICES, & PRODUCTS DECISIONS

- Identifying “strategic initiatives” to address the priorities
- What “businesses” are we currently in?
- What “businesses” should we be in?
 - The ULTIMATE Strategy Success Formula
- A framework of strategic alternatives and how to choose among them.
- The SIX questions every strategic planning process MUST answer
 - MAJOR CASE DISCUSSION
 - STRAT-PLAN EXAMPLES

4. THE STRATEGY EXECUTION CHALLENGE

The Strategy Execution Challenge

- The 10:90 Problem
- * Financial Planning Considerations
- The “Bart Star Model”
- The Principal Causes of Organizational Failure
- The Don’t Know Theory of Leadership
- * Strategy Execution Cases
- The Final Word**
- The Board and Management working together: who is responsible for what?
- What did you learn?: Major Lessons and Key Takeaways

What you will learn and bring back to your board:

Strategic Oversight Role of the Board Program is designed to demystify the “**strategy decision**” for board members. It will especially help you find the **oversight sweet spot** that puts the board on the same team as management while simultaneously allowing them to diligently vet the quality of their management’s strategic thinking.

The program also highlights **the essential principles** of proper strategic planning and showcases how a more **structured strategic management approach** is needed in order to address – and take advantage of – the astronomical changes occurring in the current environment.

A unique feature of this program is that participants will be required to bring their organization’s current strategic plan to the course and then use the lessons learned to gauge the quality of their organization’s current strategic planning readiness. Along the way, they will also develop a much deeper appreciation and understanding for the importance of having their entire organization **aligned around the strategy**. Finally, participants will be given instruction on the important processes that both raise the quality of a strategic plan and drive employee commitment to its achievement.

FACULTY BIOGRAPHY



Dr. Chris Bart
(FCPA, F.CIoD, C.Dir)

Dr. Chris Bart is the Chairman and Co-Founder of the Caribbean Governance Training Institute and Co-founder and Chairman of the Caribbean Institute of Directors. He is also the Founder of The Directors College of Canada, where from its inception in 2003 to 2013, he served as its inaugural Principal and Lead Professor. Currently, Dr Bart is the CEO of Corporate Missions Inc – an international consulting firm dedicated to helping organizations excel in the execution of their strategies. He has also authored several books including the 10 year Canadian business best seller, “A Tale of Two Employees and the Person Who Wanted to Lead Them” as well as the widely acclaimed publication: “20 Essential Questions Corporate Directors Should Ask About Strategy” – 3rd Edition”.

A retired Professor of Strategy and Governance, Dr. Bart currently serves as Associate Editor of the International Journal of Business Governance & Ethics and he continues as a Research Fellow of the Asian Institute of Corporate Governance at Korea University.

He is the recipient of numerous awards including the Queen Elizabeth II Diamond Jubilee Medal for his service to Canada. Dr. Bart is listed in Canadian Who’s Who.