

STRATEGY EXECUTION

MEASURING, MANAGING AND INTEGRATING OPERATIONS

June 4th & 5th • Washington, D.C.

- Become a Strategy-focused Organization
- Plan and Budget Using the Balanced Scorecard
- Prioritize and Inventory Initiatives
- Utilize a Balanced Scorecard Reporting System
- Establish an Office of Strategy Management
- Build on Existing Scorecard Initiatives

**Executing Strategy is the #1
Concern Facing Executives today.
Are you prepared to overcome
the deep recession?**

PRESENTED BY:



**Bob Paladino &
Associates, LLC**
Consulting, Training and Speaking

**EARN
15 CPE
CREDITS**



Dear Business Executive,

In good economic times and in bad, one thing remains constant: competitive advantage is built not solely on the best strategy, but on the best execution of that strategy. The most imperative challenge facing executives today is bridging the gap between strategy and execution; turning ideas and organizational maps into actions and devices that produce measurable results.

Improvement is only defined by measurable results that align with the vision of the CEO and Board of Directors and the expectations of stakeholders. To achieve enterprise improvement, execution must result in maximizing your organization's performance in all aspects and properly aligning actions to your strategic plan.

The Global Strategic Management Institute (GSMI) is the international authority dedicated to researching and disseminating "best-in-class" strategies, methodologies and best practices for individual and organizational improvement. GSMI has hosted numerous global events on performance management and implementation, and is pleased to announce an intensive step-by-step Balanced Scorecard training. By attending the Strategy Execution training on June 4th and 5th you will learn the best execution strategies to create and manage your balanced scorecard.

Strategy Execution

You've implemented a strategy, aligned it with your business units and incentivized your workforce. Everyone is on the same page and motivated. STOP! How do you manage strategically to assure success? This summit will provide you with the skills and highlight the best practices of Hall of Fame winners to:

1. Unify the organization's management activities into an Office of Strategy Management
2. Change management meeting to focus on strategy execution
3. Understand the role of leadership in the Balanced Scorecard process
4. Create and build effective Balanced Scorecard reports
5. Plan and budget using the Balanced Scorecard

The offered forum is designed to provide interactive training, so space will be limited. Companies can send staff to attend the offered forum in this brochure, or bring a customized program in-house for their managers. To register yourself and your team, or to inquire about customized in-house programs, call us today at (888)409-4418 or visit us online at www.GSMIweb.com.

Best Regards,

Luke Vinci,
President, GSMI

**BSC HALL OF FAME
CASE STUDIES
WILL BE COVERED**

WHO SHOULD ATTEND?

- CEOs
- CFOs
- COOs
- CIOs
- VPs of Strategy Management
- Executive Leadership Teams
- Line of Business Leaders
- General Managers
- Strategy Managers
- Strategy Planners
- Human Resource Professionals
- Program Evaluators
- Program Managers
- Scorecard Managers

5 KEY REASONS TO ATTEND

1. Unify the organizations management activities into an Office of Strategy Management
2. Change management meeting to focus on strategy execution
3. Become a strategy-focused organization
4. Create and build effective Balanced Scorecard reports and how they drive performance
5. Plan and budget using the Balanced Scorecard

“The training is so clear and easy to follow. We saved so much time.”

–GE Capital

WHY ATTEND

- Apply tangible processes for implementing and infusing real strategy in your organization
- Create executable action plans through hands on learning sessions
- Learn directly from peer experiences and networking
- Implement Best Practices to Enhance Organizational Performance
- Enhance and Improve Performance Measurements and Strategies
- Apply a Proven Methodology to Improve Performance
- Demonstrate ROI through Balanced Scorecard Performance Measures
- Benchmark Business Performance through Best Practices
- Proven Strategies to Survive and Excel in a Recession

UNIQUE FEATURES

In addition to an unparalleled learning experience, you'll also receive:

Exclusive course materials based on hundreds of implementations:

- BSC Practitioners Guidebooks containing hundreds of pages & 6 BSC Hall of Fame Case Studies
- Training manuals with hundreds of pages of examples
- Harvard Business School global Best Selling books from Dr. Robert Kaplan & David Norton
- Wiley & Sons global Best Selling book from Bob Paladino
"Five Key Principles of Corporate Performance Management"
- Harvard Business School Press Crown Castle International Hall of Fame in depth Case Study
- SFO Best Practice Assessment

**NAVIGATE THE
BALANCED SCORECARD
TO EFFECTIVELY
EXECUTE YOUR
COMPANY'S STRATEGY**



COURSE CURRICULUM AND INSTRUCTOR



The Balanced Scorecard Forum clearly outlines Drs. Kaplan & Norton's Strategy Focused Organization (SFO) model based on successful implementations, enabling you to proceed at your own pace. The curriculum is based on the Balanced Scorecard Hall of Fame criteria.

Bob Paladino, CPA and founder of Bob Paladino & Associates, LLC previously led a SFO Balanced Scorecard consulting practice for Drs. Kaplan & Norton. Since then, he and his teams have developed hundreds of strategy maps and balanced scorecards. As an executive in the office of the CEO with global powerhouse Crown Castle International, he directed its global Balanced Scorecard program to win the coveted Hall of Fame award, APQC Best Practice Award, and Wall Street Journal's Top 20 Most Improved Companies in Shareholder Value from over 1,000 companies. This training course is exclusive and is not affiliated with any other training course or firm.

Mr. Paladino, has collaborated with over a dozen Balanced Scorecard Hall of Fame Winners. Some have been selected for inclusion in his new book, "Five Key Principles of Corporate Performance Management" (From John Wiley & Sons Publishing). The Hall of Fame trilogy series of classes also contains government and not for profit case examples. Learn from table breakouts and re-usable templates for your program at home.

“Excellent practical, flexible and useful two days. I feel I had my money's worth on the first day.”

- President, Leader One Inc

7:30 AM	REGISTRATION AND CONTINENTAL BREAKFAST
8:30 AM	<p style="text-align: center;">WELCOME AND OVERVIEW</p> <p>Balanced Scorecard Hall of Fame Winner and former Crown Castle Executive Bob Paladino CPA designed this “Step-by-Step” course from his personal experiences and from his time leading Drs. Kaplan & Norton’s consulting division. He and his teams have developed hundreds of strategy maps and balanced scorecards.</p> <p style="text-align: center;">This session will give education through direct management experiences for:</p> <p style="text-align: center;">➤ Securing top leadership support ➤ Developing virtual teams ➤ Automating early</p> <p style="text-align: center;">As well as many other best practices common to:</p> <p style="text-align: center;">➤ Balanced Scorecard Hall of Fame ➤ Malcolm Baldrige ➤ AQPC ➤ Sterling Award Winners ➤ Five Key Principles of Performance Management</p>
9:00 AM	<p style="text-align: center;">OFFICE OF STRATEGY MANAGEMENT</p> <p>Learn how award-winning organizations have established Office of Strategy Management functions to centralize expertise for Balanced Scorecard programs.</p>
10:00 AM	<p style="text-align: center;">BALANCED SCORECARD REPORTING SYSTEMS</p> <p>Learn how Award Winning companies link Strategy Maps and Balanced Scorecards to key CPM processes forming integrated performance management systems to drive outsized results. Understand selected key functional requirements your system should be capable of performing. Discover Step-by-Step how this office solves the challenge of strategy implementation.</p>
11:00 AM	BREAK
11:15 PM	<p style="text-align: center;">STRATEGIC REVIEW MEETINGS</p> <p>Learn how to manage with your Balanced Scorecard. Say goodbye to dreary operating review meetings that focus on Profit and Loss statements. Welcome to meetings that focus on strategic and operation issues covering the four perspectives: finance, customer/constituent, process and people. Learn which pitfalls to avoid. Public and non-profit examples will be provided.</p>
12:30 PM	NETWORKING LUNCH
1:30 PM	<p style="text-align: center;">BREAK-OUT EXERCISE: “STEP-BY-STEP” MANAGEMENT MEETING</p> <p>Build a Hall of Fame winning strategy map. The Harvard Business School case study on Crown Castle International will provide the background and context for this hands-on exercise. Practice the key meeting management concepts presented during the morning, solidify the learning to date, and put it to practical use!</p>
3:30 PM	BREAK AND REFRESHMENTS
3:45 PM	<p style="text-align: center;">BREAK-OUT EXERCISE: “STEP-BY-STEP” MEETING SOLUTIONS PRESENTATIONS</p> <p>The groups will come together and present their progress in presentations giving you a chance to learn from and network with your fellow delegates.</p>
5:00 PM	COCKTAIL RECEPTION

“*In the majority of cases— we estimate 70%—the real problem isn’t bad strategy, it’s bad execution.*”

– Fortune

7:00 AM	CONTINENTAL BREAKFAST
8:00 AM	<p>PLANNING AND BUDGETING AND THE SCORECARD, INITIATIVE MANAGEMENT</p> <p>Learn Step-by-Step how the strategy, planning and budgeting processes fit together. Understand the difference between strategic and operational initiatives. Public and non-profit examples will be provided.</p>
9:00 AM	<p>BREAKOUT EXERCISE “STEP-BY-STEP” BSC BASED BUDGETING</p> <p>Develop a budget using real budget guidelines. Include funding for strategic initiatives created for Hall of Fame Winner Crown Castle International. By mapping strategic initiatives, you ensure that your organization is spending time and money on the actions and programs that will achieve the strategy.</p>
10:15 AM	BREAK
10:30 AM	<p>PROCESS IMPROVEMENT AND THE BALANCED SCORECARD</p> <p>Learn Step-by-Step the DMAIC problem solving method pioneered by Motorola, a training partner for Crown Castle International. Study the templates and tools used by Crown Black and Green Belts for problem solving.</p>
11:00 AM	<p>INVENTORY AND PRIORITIZE INITIATIVES</p> <p>Step-by-Step align all of the programs and projects in our case to the Balanced Scorecard. By mapping strategic initiatives, you ensure that your organization is spending time and money on the actions and programs that will achieve the strategy. Learn how to inventory, map, prioritize, and align your initiatives.</p>
12:00 PM	<p>LUNCH AND LEARN TABLE DISCUSSIONS</p> <p>Lunch features organized table discussions on topics of interest to delegates, including public-sector scorecards and software tools. Learn how to make strategy execution a core competency by building a Center of Excellence.</p>
1:00 PM	<p>BREAK-OUT EXERCISE: “STEP-BY-STEP” STRATEGIC INITIATIVE MAP</p> <p>Using the Hall of Fame Winner Crown Castle International case, map the strategic initiatives to the objectives of the Balanced Scorecard. Exercise applies to all types of organizations.</p>
2:15 PM	BREAK
2:30 PM	<p>KNOWLEDGE MANAGEMENT</p> <p>Learn key knowledge management concepts and how they enable significant Balanced Scorecard results. Learn from actual examples, best practices (we call “Crown Gems”) from Hall of Fame Winning Crown Castle.</p>
3:15 PM	<p>BECOMING A STRATEGY-FOCUSED ORGANIZATION</p> <p>Learn how to apply the components of your BSC to become a Strategy-focused Organization. You will come away with an understanding of the road map ahead and the knowledge necessary to integrate the Scorecard with other CPM methods; learn from the winner’s circle of private, public and non-profit organizations featured in “Five Key Principles of CPM.”</p>
3:45 PM	RECAP AND REVIEW
4:00 PM	HALL OF FAME TRAINING ADJOURNS

“ Bob Paladino’s observations and principles are firmly rooted in the Kaplan/ Norton Strategy Focused Organization (SFO) Methodology. – David P. Norton, Inventor, Balanced Scorecard and Strategy Focused Organization concepts ”

BRING THIS TRAINING PROGRAM IN-HOUSE!

GSMI offers customized one, two and three-day education programs to corporations, non-profits, and government organizations who wish to train their staff members in the comfort of their own facility. In-house trainings provide a curriculum tailored specifically to your office, program or agency in a cost-efficient way. Using today's in demand methodologies and strategies. GSMI offers training tailored to your specific needs in overcoming challenges such as:

- Strategic Planning
- Performance Management Systems
- Human Capital Management
- Organization and Alignment
- Process Improvement
- Change Management
- KPI Development
- Balanced Scorecard Methodology
- Workforce Planning

Contact Byron Mignanelli
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Some of our clients include:



John Deere



Crown Castle International



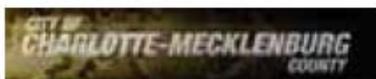
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Level 3 Communications



Omaha Public Power



City of Charlotte-Mecklenburg

CPE CREDITS

Delivery Method: Group-live

Prerequisites: None

Advanced Preparation: None

CPE Credits: 15 credits for completion of 2 day curriculum Bob Paladino and Associates, LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to:

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Do you have any special dietary restrictions?
(e.g. kosher, vegetarian)

_____ Yes _____ No

Do you require any accommodations that require
special attention? (e.g. wheelchair access)

_____ Yes _____ No



HOTEL AND VENUE

Washington D.C. Training Facility (MicroTek)

1101 Vermont Avenue NW (at "L" St.), Suite 300
Washington, DC, 20005 | 202) 289-3811

Balanced Scorecard Forum Tuition

Early bird tuition (before April 3)	\$1,795
Regular tuition	\$1,995
Early bird government/non-profit tuition (before April 3)	\$1,595
Regular tuition government/non-profit	\$1,795

**For groups of 3 or more, please call or email Byron Mignanelli,
byron@GSMIweb.com or 888-409-4418**

*note: no double discounts will apply

Administrative Note: A \$300 cancellation fee on registration will be charged for cancellations received less than four weeks from the date of the conference. After that date, cancellations are non-refundable. As speakers are confirmed six months before the event, some speaker changes or topic changes may occur in the program. GSMI is not responsible for speaker changes, but will work to ensure a comparable speaker is located to participate in the program.

