LEADING & MANAGING STRATEGY IN A DISRUPTIVE WORLD

ASSOCIATION FOR STRATEGIC PLANNING ANNUAL CONFERENCE

PRE CONFERENCE MASTERCLASSES
MAY 24 2017

CONFERENCE
MAY 25 - 26 2017

TORONTO, CANADA

2017 CONFERENCE AGENDA
<table>
<thead>
<tr>
<th>Time</th>
<th>Masterclass 1</th>
<th>Masterclass 2</th>
<th>Masterclass 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>09:00</td>
<td>Dan Montgomery&lt;br&gt;Agile Strategies</td>
<td>James D. Stockmal</td>
<td>Dr. Sheri Barker &amp; Valerie McLeod&lt;br&gt;Haines Centre for Strategic Management</td>
</tr>
<tr>
<td>13:30</td>
<td>David Wilsey&lt;br&gt;Balanced Scorecard Institute / Strategy Management Group, Inc.</td>
<td>Frank Spencer &amp; Yvette Montero Salvatico&lt;br&gt;Kedge, LLC</td>
<td>Peter Sorenson&lt;br&gt;Strategic Organization Design</td>
</tr>
<tr>
<td></td>
<td>Measure What Matters - Improve Strategic Execution with KPIs</td>
<td>Strategy Plus: From Insights to Impact</td>
<td>Strategy Driven Deliberate Organization Design</td>
</tr>
<tr>
<td>17:00</td>
<td>Opening Reception &amp; Exhibitor Showcase</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# AGENDA

**CONFERENCE DAY 1**  
**THURSDAY MAY 25**  
**COURTYARD MARRIOTT DOWNTOWN TORONTO**

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
</tr>
</thead>
<tbody>
<tr>
<td>07:30 – 18:00</td>
<td>Registration and Exhibitor Showcase</td>
</tr>
<tr>
<td>08:00 – 08:30</td>
<td>Breakfast</td>
</tr>
<tr>
<td>08:30 – 08:45</td>
<td>Welcome Remarks</td>
</tr>
<tr>
<td>08:45 – 09:30</td>
<td>Keynote Presentation – Paul Sturgess, Royal Bank of Canada – Strategic Leadership and Business Architecture</td>
</tr>
</tbody>
</table>
| 09:45 – 11:00 | Session 1  
  **Nadia Khaled AlZeabot**  
  *Kuwait Oil Company*  
  Managing Change through “Center of Excellence” Implementation for the Upstream Oil Sector in Kuwait |
|            | Session 2  
  **Jitu Marwaha**  
  *SanDisk / Western Digital*  
  Creating New Markets Through Disruptive Innovation |
|            | Session 3  
  **Elliot Rawls**  
  *U.S. Cellular*  
  Don’t Let Your Strategic Plan Get in the Way of Your Strategy |
|            | Session 4  
  **Philip Rowley**  
  *Berkeley Research Group*  
  Creating an Agile Culture |
| 11:00 – 11:30 | Break and Exhibitor Showcase |
| 11:30 – 12:45 | Session 5  
  **Blair Dimock & Ben McNamee**  
  *Ontario Trillium Foundation*  
  From Strategy to Impact: One Funder’s Journey to Granting for Outcomes |
|            | Session 6  
  **Matt Sitter**  
  *CrossLead, Inc.*  
  Strategy in the Digital Age: Leveraging Organizational Networks to Connect Strategy with Execution |
|            | Session 7  
  **David Kalinowski**  
  *Proactive Worldwide, Inc.*  
  Leveraging Strategic War Games for Competitive Advantage |
|            | Session 8  
  **Brian Cassell, Linda Fineman, Dan Montgomery**  
  *Ethos Veterinary Health*  
  Agile Alignment into Action: A Strategic Planning Case Study using a Transformative Platform |
| 12:45 – 13:45 | Lunch and ASP Annual General Meeting |
| 13:45 – 14:30 | Keynote Presentation – Devyn Smith, Sigilon - Building and holding a Strategy during Turbulence |
| 14:45 – 16:00 | Session 9  
  **Gwen Manderson & Daniel Olding**  
  *Town of Richmond Hill*  
  People Plan Richmond Hill - Putting all the elements of Strategic Planning and Strategic Implementation Together |
|            | Session 10  
  **Brian Emmett**  
  *Imagine Canada*  
  Charities and nonprofits in an era of economic and demographic change? |
|            | Session 11  
  **Dr. Tanai Charinsarn**  
  *Innovation Partners Co. Ltd*  
  Using Emerging Business Opportunities (EBO) model in Corporate Portfolio Strategic Planning |
|            | Session 12  
  **Dr. Sean Stein Smith**  
  *Rutgers University*  
  Quantifying the Qualitative - Better Data & Strategic Decision Making |
| 16:00 – 16:30 | Break and Exhibitor Showcase |
| 16:30 – 17:45 | Session 13  
  **Jaime Schonfeldt & Denise McNerney**  
  *iBossWell, Inc.*  
  Assessing the Effectiveness & Sustainability of Your Program Portfolio |
|            | Session 14  
  **Rossana Creo**  
  *United Nations Federal Credit Union*  
  Culture Eats Strategy for Breakfast: Using Strategic Communications to Manage Change and Create Organizational Alignment |
|            | Session 15  
  **Brett Knowles**  
  *Performance Measurement & Management (Pm2)*  
  The Personal Strategic Scorecard |
|            | Session 16  
  **Tom Witty**  
  *Americo Financial Life Insurance Co.*  
  Bridging the Gap between Business Strategy and Project Execution |
<p>| 19:00 – 22:00 | Networking Dinners (optional) |</p>
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:00 – 16:00</td>
<td>Registration and Exhibitor Showcase</td>
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<tr>
<td>08:00 – 08:30</td>
<td>Breakfast</td>
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<tr>
<td>08:30 – 09:00</td>
<td><strong>Association for Strategic Planning/ Strategic Planning Society Alliance Update</strong></td>
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<tr>
<td>09:05 – 10:00</td>
<td><strong>Agile Smackdown!</strong></td>
</tr>
<tr>
<td>10:00 – 10:45</td>
<td>Break and Exhibitor Showcase</td>
</tr>
<tr>
<td>10:45 – 12:00</td>
<td><strong>Session 17</strong>&lt;br&gt;Dr. John LaBrie&lt;br&gt;Northeastern University - Toronto&lt;br&gt;Navigating Change using Strategic Direction: One University's Journey through Disruptive Change</td>
</tr>
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<td><strong>Session 18</strong>&lt;br&gt;Jennifer Baker&lt;br&gt;Amtrak&lt;br&gt;What Good is Strategy if You Can't Implement It?</td>
</tr>
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<td></td>
<td><strong>Session 19</strong>&lt;br&gt;Diane Meister &amp; Neelima Firth&lt;br&gt;Meridian Associates&lt;br&gt;Outfox Organizational Risk with Scenario-Based Strategic Planning</td>
</tr>
<tr>
<td></td>
<td><strong>Session 20</strong>&lt;br&gt;Mike Abrey-Bugg &amp; Robert Wyatt&lt;br&gt;Strategic Planning Society&lt;br&gt;Strategic Implications for Corporate Reputation Management</td>
</tr>
<tr>
<td>12:00 – 13:15</td>
<td>Lunch and Awards</td>
</tr>
<tr>
<td>13:15 – 14:00</td>
<td><strong>Disruption in Healthcare: Leading Strategy in these Challenging Times. A Healthcare Panel Discussion</strong></td>
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<tr>
<td>14:15 – 15:30</td>
<td><strong>Session 21</strong>&lt;br&gt;Jesse Russell&lt;br&gt;Big Picture Research and Consulting&lt;br&gt;Don Quixote or Sancho Panza: Who Is Doing Your Planning?</td>
</tr>
<tr>
<td></td>
<td><strong>Session 22</strong>&lt;br&gt;Pamela Lomax&lt;br&gt;YZ Strategies&lt;br&gt;It's not just for Senior Management - Case Studies using an inclusive Strategic Planning Process</td>
</tr>
<tr>
<td></td>
<td><strong>Session 23</strong>&lt;br&gt;Christina Burns Bruce&lt;br&gt;City of Vaughan&lt;br&gt;The Stewardship of Service Excellence at the City of Vaughan: Measuring our Success</td>
</tr>
<tr>
<td>15:30</td>
<td>Conference Close</td>
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</tbody>
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Dan Montgomery is Managing Director of Agile Strategies. With a diverse background in software development, IT management, HR, strategic planning, coaching, and performance measurement, Dan approaches strategy from a holistic point of view that integrates engagement, agility, organizational learning, and customer value. Dan is co-author of The Institute Way: Simplify Strategic Planning and Management with the Balanced Scorecard.

**ACHIEVING BUSINESS AGILITY WITH OKRs**

Objectives and Key Results (OKRs) is a rapidly emerging goal setting practice for building overall business agility, featuring fast feedback and high levels of team engagement. OKRs originated in Silicon Valley firms including Intel, Google, and LinkedIn, and have spread to other industries and non-tech companies including Patagonia, ING Bank, The Guardian, and Target. OKRs build on the agile mindset and culture without the focus on software development. OKR is an easy to learn, rapid feedback process that engages each team’s perspective and creativity. The big difference from traditional planning methods? OKRs are set, evaluated and reset frequently - typically quarterly. In a typical OKR environment, at least 60% of the goals are set bottom-up, rather than being cascaded from a more global objective. This provides a much more engaging environment for the teams setting the goals. OKRs are a great way to ensure that teams stay focused on what matters to the customer, and for other parts of the business to go agile without all the technical jargon.
Several recent studies suggest only 13% of companies execute their strategies effectively, meaning leadership is out of touch with the people in the organization that execute the company's strategy. This disconnect has serious implications for organizational success, as failure to realize strategy often means missed deadlines, lost opportunities, and other more significant repercussions.

If employees don't understand where the company is going, they may all develop their own priorities and actually prevent the organization from getting where it needs to be. Part of getting everyone on board is creating a strategic plan complete with the organization's values, vision, and mission. Then, there's the challenge of bringing these principles to life in a meaningful way that people can relate to.

The course will cover 12 strategic frameworks:

- 6 external development
  - Consolidation-Endgame Curve, Porter’s Five Forces, BCG Growth-Share Matrix, Blue Ocean Strategy, SWOT Analysis, PEST Analysis
- 3 internal development
  - Marketing Mix (4/7 P's), Product Lifecycle Analysis, Consumer Adoption Curve
- 3 execution frameworks
  - Balanced Scorecard, Strategic Execution Framework, Organizational Hurdles

James Stockmal, President of the Association for Strategic Planning (ASP) has over 25 years of experience in helping organizations develop and execute strategy through the integration of people-focused, process-oriented, and technology-enabled initiatives. Mr. Stockmal has employed a variety of strategic tools and methods for public and private sector clients, including environmental scanning, balanced scorecard, competitive analysis, and blue ocean strategy. Strategy clients include the Royal Bank of Canada, Australian New Zealand Bank, the Bank of Montreal, CitiCorp, Aetna, Ford Motor Company, Estafada, and Exxon Mobil. His government clients include the US Air Force, the US Army, the Navy Criminal Investigative Service (NCIS), the Millennium Challenge Corporation, NASA, the General Services Administration, NTSB and NOAA. His non-profit clients include San Miguel DC and DC Net Impact.

Mr. Stockmal writes monthly articles on strategy development, execution and transformation for The Strategic Edge, a publication of the Association for Strategic Planning (ASP).
certified coach, facilitator and trainer. Valerie is a strategic thinker and is a Global Partner and co-owner of the Haines Centre for Strategic Management. She has an unusual background with a B.Math and a MBA in Human Resources, so can work with clients from non-profits, to government, to for-profit organizations. She specializes in strategic planning & implementation, managing change, strategic thinking and leadership and is located in Calgary, AB.

**FACILITATING STRATEGY SESSIONS: THE SYSTEMS THINKING APPROACH®**

Well, that was a royal waste of time! How many times have you left a meeting and either thought this yourself or heard another say it aloud? Meetings ARE a waste of time . . . IF they are not effectively guided through a series of important processes that ensure group input is focused and balanced. Unfortunately, facilitation skills are seldom taught intentionally, seldom studied and implemented with finesse, and usually ignored as a field of study for strategic planning and change. Yet, it is one of the most important and powerful tools leaders can use to lead and manage strategy in a disruptive world. C.K. Prahalad identified three strategic actions of managers: Managing the Present, Selectively Abandoning the Past, and Creating the Future. How can a leader guide this critical work with a team if (a) a single voice dominates the conversation, (b) hostility overtakes content, (c) the focus becomes blurred, or (d) there is no cohesive structure and process to ensure success? Applying The Systems Thinking Approach® to facilitating strategy dramatically improves outcomes!
Despite today’s overwhelming avalanche of data from every direction, most strategic leaders do not have the information they need to understand if their organizations are executing strategy and achieving their objectives. It is imperative that in a disruptive world leaders and managers use a disciplined process for designing and implementing measures that are meaningful. Measuring strategic success is not easy, as priorities, goals, and desired outcomes are often articulated as abstract and vague ideals that are not obviously measureable. As a result, many KPIs often miss the mark, and inform only on the more obvious and less strategic elements of the plan, such as project milestones and operational efficiencies.

In this workshop, we look at how to develop meaningful KPIs that boost enterprise-level success. Using case studies, various performance measurement models, practical client examples, and group discussions, participants will see how meaningful and strong KPIs provide insight into whether strategies are working, whether programs, projects and services are effective, and whether employees’ attention is focused on what matters most to success.
Yvette is an experienced and engaging speaker who is unique in her ability to transport audiences into the future. Holding a bachelor’s degree in Finance and an MBA from the University of Florida, Yvette has over 15 years of corporate experience with large, multi-national firms such as Kimberly-Clark and The Walt Disney Company. At the Walt Disney Company, Yvette led the effort to establish Future Workforce Insights to identify future workforce trends and leverage foresight models and techniques to assess potential threats and impacts, emerging ideas, and exciting opportunities for the organization. In her current role as a partner at Kedge – a strategic design, foresight, and innovation firm – Yvette utilizes extensive research and customized toolkits to service a diverse global client base. She nurtures strong relationships with her clients and challenges them to foster new ways of thinking.

STRATEGY PLUS: FROM INSIGHTS TO IMPACT

Strategic Planning professionals may be facing the most complex, uncertain and disruptive operating environment in history. In this challenging landscape, the volatility only promises to accelerate.

What if you could leverage these forces of constant change to foster the most dynamic growth your organization has ever seen? In an age when most leaders are paralyzed by ambiguity and uncertainty, you can set yourself apart by learning how Strategic Foresight can become an invaluable part of your strategy planning process.

Join foresight professionals Yvette Montero Salvatico and Frank Spencer for this popular workshop that will empower you to “think like a futurist.” Working in small groups, you will gain hands-on tools and thought processes that enable you to build robust, resilient and transformative strategy today.
STRATEGY DRIVEN DELIBERATE ORGANIZATION DESIGN

Leading and managing strategy in a disruptive world is a befuddling challenge. It is complicated and often complex. The field of play is constantly changing as technology advances, new competitors emerge, the political and social environments shift, and existing relationships morph. The Deliberate Design Model of Strategy Driven Organization Design calls for a balance in both rapid, deliberate design and dynamic improvisation to stay relevant and anticipate your next move.

Specific approaches and tools are explained and explored using case examples that illustrate how the approaches and tools can be woven into an innovative fabric of strategy formulation and implementation through designing and doing the operating organization.

Cautions and pitfalls are explored as the problem of hidebound cultures is toyed with and the ubiquitous phenomenon of “design-by-default” (the opposite of deliberate design) is decried as the death knell of the doomed organization. Hotwiring the bureaucracy is advocated as the necessary guerilla warfare tactic required for overcoming the monolithic, ossified, constipated, entrenched interests, ideologies, and self-preserving mechanisms of some segments of our modern societies.

Consultants awarded Pete the Certified Management Consultant® (CMC®) designation in 2002.

PETER SORENSON - STRATEGIC ORGANIZATION DESIGN

Peter Jay Sorenson, CMC® designs and changes organizations focusing on the impact of technology change on strategic choices and the design of the innovation process in organizations. He has spent more than 10 days at Google, uses a bunch of Apple devices, software, and services, test drove a Tesla and toured the Tesla factory. In addition to working with tech companies he also works with healthcare organizations and the offshore oil and gas industry.

In 2016 Pete worked on the conference design team for a conference focusing on “Integrating Technology & Organization In a Digital World”. This innovatively designed international conference focused on creating knowledge and designing knowledge work and knowledge work organizations rather than simply sharing knowledge. He sees these kinds of cutting edge approaches as essential to dealing with the challenges of designing the organizations of the future.

He earned his Bachelor's Degree in the Behavioral Sciences at the University of Washington (1976) and his Master's Degree in Organizational Behavior from Brigham Young University (1979). The Institute of Management
Paul became Vice President, Strategy & Business Architecture in May 2017. He leads the strategy function for Personal & Commercial Banking, driving strategic planning, business portfolio reviews and business line strategy development. Prior to that he was a Managing Director in RBC’s Enterprise Strategy Group, where he worked closely with RBC’s senior leaders to develop RBC’s wider enterprise strategy and lead special projects.

Paul joined RBC from Manulife Asset Management, where he was responsible for strategy, marketing, communications and digital. Prior to that, he was a management consultant at Booz & Company in New York, where he led strategy engagements for financial institutions in the US and in Germany. Previously, he worked for KPMG Corporate Finance in London and Paris, advising clients in Europe and Asia in the context of acquisitions, joint ventures and restructurings.

Paul has an MBA from Columbia Business School, an MSc in Political Economy from the London School of Economics, and a BA in Economics from McGill University.

Paul will speak on how to manage strategy in a disruptive and fast-paced environment, using Business Architecture as a guiding framework.
MANAGING CHANGE THROUGH “CENTER OF EXCELLENCE” IMPLEMENTATION FOR THE UPSTREAM OIL SECTOR IN KUWAIT

Kuwait Petroleum Corporation directed the three Upstream subsidiaries to collaboratively develop and work towards an integrated Upstream 2030 strategy. One of the key elements to achieving the 2030 strategic objectives was to collaborate and share expertise to address technical challenges currently facing the Upstream companies. As a result, the Upstream Center of Excellence (CoE) project was officially kicked off in September 2013 and has now completed its implementation stage. Upstream CoE is a network of technical experts with similar expertise and interests, through which an exchange and application of knowledge are achieved and managed. It is a mechanism where the Upstream subsidiaries of Kuwait Oil Company (KOC), Kuwait Foreign Petroleum Exploration Company (KUFPEC), and Kuwait Gulf Oil Company (KGOC) build and leverage on the diverse competencies and expertise of their technical talent pool for technical advisory, knowledge sharing, capability development, and expert deployment. Since its establishment, the Upstream CoE showed significant value creation for the Upstream companies through the sharing of lessons learned, best practices, and related experiences in the designed CoE Technical Disciplines.

Session #1

NADIA K. ALZEABOT, M.E., M.SC., MBA – KUWAIT OIL COMPANY

Mrs. Nadia AlZeabot is a Senior Planner in Kuwait Oil Company. She is a professional woman, entrepreneur, a geoscience and petroleum engineering expert with 15 years of experience working with research and development, exploration, field development & drilling teams. Mrs. Nadia has an extensive knowledge in Strategic Management, Planning Processes, Leadership, Change Management, Petroleum Geology & Petroleum Engineering. She has worked closely with consultants from British Petroleum (PB), Schlumberger (SLB), IFP Energies nouvelles (IFPEN), ChevronTexaco, Robertson, Flour, BHI and others on various technical projects.

Mrs. Nadia is a certified internal auditor for ISO 9001: 2008 from Global Quality Institute for training with experience in delivering to multi-cultural audience in both English and Arabic.

Mrs. Nadia earned a Bachelor and a Master degree from Kuwait University in Petroleum Geology. She also earned a Master in Petroleum Engineering from University of Southern California, USA, and an MBA Specialized in General & Strategic Management from Maastricht School of Management, Kuwait. She is a Harvard Alumni and completed the full program for leadership development.

CONFERENCE DAY 1 THURSDAY MAY 25
09:45 – 11:00

RETURN TO FULL AGENDA
JITU MARWAHA – SANDISK / WESTERN DIGITAL

Jitu Marwaha is the Senior Director of Corporate Strategy & Innovation at Western Digital (formerly SanDisk), where he is responsible for Strategic Planning and Corporate Portfolio Management. Prior to SanDisk/Western Digital, Jitu was an innovation and strategy consultant for over a decade, helping a broad array of high-tech companies to drive profitable growth. He holds a MBA degree with Distinction from the University of Michigan, and a Bachelor’s degree with Distinction from Pondicherry University in India.

CREATING NEW MARKETS THROUGH DISRUPTIVE INNOVATION

Taking the flash memory industry as an example the presentation will highlight the creation of new markets through disruptive innovations. Today flash memory technology is ubiquitous and at the core of personal data storage products such as USBs at one end and extremely fast Solid State Drives (SSDs) for Enterprise data centers at the other. It will focus on how new market applications were enabled, the challenges involved and the broader lessons that can be drawn for industries in general. It will then highlight how some of the popular Flash memory products such as USBs are in turn being disrupted by cloud storage. The key message being that, "whatever business you are in it will be eventually disrupted".
SESSION #3

ELLIO T RAWLS – U.S. CELLULAR

Elliot Rawls is Senior Director of Strategy and Corporate Development for Chicago-based, U.S. Cellular Corporation, a wireless carrier with close to 5M subscribers and $4B in revenue. His team’s responsibilities include strategy development and assessment, strategic long range forecasting, enterprise risk management, and short and long-term business analysis. He’s also overseen the strategic and financial evaluation of numerous acquisition and divestiture opportunities. Prior to his current role, Rawls held positions at US Cellular in pricing strategy, business development, and research and communications. Prior to US Cellular, he was President of The Cambaire Corporation, a consultancy that provided market research, financial, and general management services. Rawls earned his MBA at Stanford and holds BA and BARCH degrees, both in architecture, from Rice University.

DON'T LET YOUR STRATEGIC PLAN GET IN THE WAY OF YOUR STRATEGY

The distinctions between strategy and strategic planning are, at least, partially understood. However, for many organizations, managing to these differences remains a challenge. The authority given to the strategic planning process often distracts from strategy making and strategy evaluation, undermining that critical work. And, ironically, the strategic role of a strategic plan is too frequently short changed.
Session #4

PHILIP ROWLEY – BERKELEY RESEARCH GROUP

Philip Rowley, Strategy Leader, Chief Revenue Officer and Executive Director, leads the Strategy practice at global strategic advisory and economic consulting firm Berkeley Research Group. He brings three decades of experience in the management consulting and expert services industries. He has held senior management positions in both public and private entities. His responsibilities included firm-wide, regional, and practice area oversight as well as business development and marketing disciplines. Phil has led numerous consulting assignments across various industries involving strategy, intellectual property, competition, human capital, and business valuation. Phil is currently focused on BRG’s organizational agility related to its individual brand ambassadors, social proximity selling, and account-based marketing.

CREATING AN AGILE CULTURE

Amid increasing uncertainty, strategy leaders must constantly formulate ways to sustain competitive advantage and deliver value. Phil Rowley will discuss navigating highly dynamic and competitive environments, including the battle for talent, the challenges of measuring value created, and trends in corporate Innovation.
BLAIR DIMOCK - ONTARIO TRILLIUM FOUNDATION

Blair leads the strategic partnerships and services to the community that support applicants and grantees to build their capacity and amplify their impact. He also oversees the Measurement, Evaluation and Learning department that leads the Foundation’s Business Intelligence and Knowledge Management strategies.

Blair oversees the development and implementation of other provincial granting programs that align with the Foundation’s overall strategy. Currently this includes the Community Capital Fund, the Youth Opportunities Fund and the Local Poverty Reduction Fund. Blair also leads the development and implementation of the Services to the Community Program, which supports the capacity building needs of Ontario’s nonprofit sector, as well as the building of partnerships between the Foundation and other key stakeholders in order to advance the Foundation’s strategic goals.

Prior to joining the Foundation in 2006 as Director of Research, Evaluation and Knowledge Management, Blair was Director of Strategic Planning and Research at TVOntario, served as Research and Partnership Coordinator with the Ontario Premier’s Council, and was a Lecturer in International Politics at Trent University, the University of Toronto and the University of Waterloo.

Blair currently sits on the Steering Committee on Not-for-Profit Research at the Mowat Centre for Policy Innovation, the Not-for-Profit Governance Committee of the Certified Professional Accountants of Canada, and the Advisory Committee of the Centre for Effective Philanthropy.

Blair has served on the Province’s Social Enterprise Strategy Advisory Group, the Toronto Foundation’s Vital Signs Advisory Committee, and Community Foundations of Canada’s Vital Signs Future Visions Task Force.

BENJAMIN MCNAMEE - ONTARIO TRILLIUM FOUNDATION

Ben is the Acting Director of Measurement, Evaluation, and Learning at the Ontario Trillium Foundation. He oversees the Foundation's Business Intelligence, Impact Measurement, Open Data, and Knowledge Management programs. He was previously an Impact Measurement and Evaluation Analyst, working to evaluate the impact of individual OTF grantees and the organization's whole Investment Strategy. He has played a vital role in the data analytics team at OTF, helping to lead the Balanced Scorecard implementation and the Open Data project. Prior to joining OTF, he worked as an Impact Analyst with Charity Intelligence, undertaking over 50 social impact evaluations of Canadian charities. Ben has lectured on a variety of applied economics topics, with a specific focus on using data to evaluate policy, performance, and organizations. He has an MA in Economics from Simon Fraser University.
FROM STRATEGY TO IMPACT: ONE FUNDER'S JOURNEY TO GRANTING FOR OUTCOMES

Over the past three years the Ontario Trillium Foundation (OTF), one of Canada's largest grantmaking foundations, transformed its strategy for building healthy and vibrant communities through investments in community-based initiatives. The provincial agency adopted an outcomes-based model to transform both what initiatives to fund and how to decide what to fund, supported by a new evidence-based and data-driven methodology and infrastructure.

This session will provide a detailed account of OTF's journey from re-thinking its strategy to planning and executing on it, including a look at the challenges encountered along the way in terms of leading the change process and measuring the results.

The session will include practical tips and tools on how to approach a strategic transformation, and a glimpse at the early results of the new investment model.
Network analysis itself is certainly not new, however, the study of organizational networks to better understand communication and decision making in organizations is relatively new.

If you approach HR in an organization to ask about the relationships between its employees, they will likely hand you something that looks like a formal organization charts with lines and boxes that shows the reporting relationships that exist.

If instead you ask how work actually gets done in your organization, you get a very different picture --- beneath the org chart exists an invisible network of relationships between employees. While some organizations have more dense internal networks than others, all organizations have relationships that exist outside of their org charts.

In this session we will discuss how network analysis works in organizations, what some of the consequences can be in the event that an organization doesn't understand its network, and how you can unlock your network to increase the speed of execution and strengthen the connection between strategy and execution.

Matt Sitter – CrossLead Inc.

Matt leads the CrossLead Client Services Team as Chief Services Officer. He is an experienced Project Lead who advises client senior leadership on how to improve internal communications and build organizational alignment.

Matt joined CrossLead following his role as Regional President at McChrystal Group, as well as a successful career in the healthcare industry. He worked as the Product Marketing Manager for Elekta AB, the Director of Disease Management for Celera, Inc., and the Director of Reimbursement Analytics for Veracyte. In each of these positions, Matt utilized and personally developed new methodology, metrics, and analytics, demonstrating his innovative approach to project management.

Matt completed his undergraduate studies at Brown University and received his MBA from Dartmouth College’s Tuck School of Business.
As President and Co-founder of Proactive Worldwide, Inc., David Kalinowski leads the organization in developing and implementing the strategies and tactics that are critical to delivering world-class decision support research, training, and consulting services.

A 26-year veteran in the competitive intelligence field, David is known for his skills in helping clients recognize and transcend their business and competitive challenges. He has directed over 2,000 global research and consulting engagements for approximately 150 of the Fortune 500 companies to help them gain and maintain a competitive edge.

David is a recognized CI expert whose experience includes overseeing projects in benchmarking, market entry and defense, strategic early warning, CI effectiveness, competitive strategies, operations, marketing, pricing, R&D, sales and counter-intelligence. He regularly assists numerous advisory and executive boards in highly sensitive competitive intelligence strategy development, and regularly facilitates war game planning initiatives.

Aside from earning the prestigious Catalyst Award in 2005 from the Strategic and Competitive Intelligence Professionals (SCIP), David was the first recipient of SCIP’s new Distinguished Member – Solution Provider award in 2015.

LEVERAGING STRATEGIC WAR GAMES FOR COMPETITIVE ADVANTAGE

Seeking an engaging way to integrate the cross-functional knowledge that exists in your organization about your market or competition to help align leadership on the landscape, pressure test your strategies, identify blind spots, evaluate alternative strategies to mitigate risks or threats and recognize opportunities, anticipate competitors' likely responses, and develop countermoves? Then an experiential, human-based, intelligence-driven war game activity that involves behavioral-modeled role playing is the solution. With market uncertainty and disruption that companies face, executives need to collaborate more than ever before to make informed investment decisions everyone can get behind. War games help determine if you have the right strategies or if you need to develop new ones, and the rigor of the exercises ultimately drive answers two key questions: 1) What could competitors do? and 2) How can our plan outsmart them? This session will provide you with the necessary foundational war game knowledge to provide an effective event in your organization.
BRIAN CASSELL – ETHOS VETERINARY HEALTH

Brian Cassell has more than 25 years of diverse experience in the veterinary profession and animal health industry, including clinical practice, practice ownership and sale, organizational consulting, executive leadership and pharmaceutical start up. As the Chief Strategy Officer for Ethos Veterinary Health, he is focused on the organization’s strategic focus and processes, ensuring that execution supports the business strategy.

LINDA FINEMAN – ETHOS VETERINARY HEALTH

Linda Fineman is a veterinary medical oncologist with a wide range of experience in the veterinary profession including clinical practice, partnership and business leadership in large multispecialty veterinary practices. She has been a communications coach and facilitator at two colleges of veterinary medicine. With Ethos Veterinary Health, her current role as Director of Veterinary Talent and Knowledge Strategy is focused on strategic aspects related to the people and culture of the organization.

DAN MONTGOMERY – AGILE STRATEGIES

Dan Montgomery is Managing Director of Agile Strategies. With a diverse background in software development, IT management, HR, strategic planning, coaching, and performance measurement, Dan approaches strategy from holistic point of view that emphasizes engagement, agility and customer value.

AGILE ALIGNMENT INTO ACTION: A STRATEGIC PLANNING CASE STUDY USING A TRANSFORMATIVE PLATFORM

This is a case study of how Ethos Veterinary Health implemented an innovative, digitally based and broadly participative process for refining its 4-year strategic plan. It included all the classic steps of strategy development, including: clarifying planning assumptions; setting measurable objectives; addressing risks and constraints; and developing an action plan. The use of a digital platform allowed for an unprecedented level of both honest input and broad participation – at the same time reducing travel, meeting costs and time commitments.

The presentation will provide an introduction to Ethos, a national veterinary specialty firm newly created through a merger of four regional firms, and rapidly growing thru acquisitions. We will discuss how we came to adopt Alignment Optimization (a tool from vendor SchellingPoint) as a platform to build endorsement, improvement and refinement of the original Ethos vision and strategy. We will address the challenges of attempting a more conventional strategy process in this context, how we overcame them, the outcomes and learnings from the process.
Devyn recently joined Sigilon, a biotechnology company, as its Chief Operating Officer tasked with building out strategy and operational elements of the company as it builds a portfolio of potential new medicines. Prior to Sigilon, Devyn was part of Pfizer's Medicinal Sciences Division of R&D as Head of Business Operations & Strategy. The focus of this role was both day to day business operations of the division, as well ensuring implementable strategies are developed. Medicinal Sciences encompasses the groups focused on discovery, formulation, and early manufacturing of the large molecule, small molecule, cell and gene therapy programs in Pfizer R&D. Prior to this Devyn was Head of Strategy for the Pharmatherapeutics Division of Pfizer R&D focused on developing and implementing core strategies in Winning by Design in Small Molecules as well as optimizing the ROI on novel technology inventions. Prior to this, Devyn was part of Pfizer's Neusentis Research Unit in the UK as Chief Operating Officer responsible for strategy, operations and implementing key strategies. In addition, he supported the Pharmatherapeutics Global Clinical Research Organization as the Chief Operating Officer. He joined Pfizer's Strategic Management Group in August 2009.

Prior to joining Pfizer, Devyn was a principal for The Frankel Group (a boutique management consulting firm in New York City and Cambridge). In his consulting experience, Devyn led a wide range of projects, across multiple therapeutic areas and a host of technology platforms, including basic R&D tools, regenerative medicine, gene therapy, and macromolecules/biologic products. Client relationships have ranged from large pharma to small biotech companies. Regenerative Medicine has been an area of strong focus with over 30 engagements, several published papers, and numerous invited conference presentations. Prior to joining The Frankel Group, Devyn worked as a management consultant at Adventis Corporation focused on clients in information intensive companies.

Devyn received his Ph.D. in Genetics from Harvard Medical School where his research culminated in 12 publications in leading journals such as Cell, Nature, and Development. He also holds an MS in Biology from Idaho State University and a BS in Zoology from Brigham Young University.

BUILDING AND HOLDING TO A STRATEGY DURING TURBULENCE

Navigating strategy during times of turbulence has historically been an episodic challenge, but it seems to be a constant theme over the last decade in many industries as we undergo many economic, global and technological disruptions. How does one succeed in this new world? How do companies develop sustainable strategies? How do we keep flexible strategies in this environment? There are no easy answers, but we can learn from prior experiences in our own and other industries.
Gwen Manderson is Director, Strategic Initiatives at the Town of Richmond Hill, a community of approximately 215,000 people located in the Greater Toronto Area.

Gwen has a Bachelor of Environmental Studies in Urban and Regional Planning, and a Diploma in Public Administration. In her more than 30 years of experience working for municipal governments in the GTA, Gwen has been a city planner, management consultant, manager and Director responsible for a variety of areas – strategic planning, economic development, planning policy, corporate policy, intergovernmental affairs, service improvement and procurement.

Daniel Olding has been active in strategic and environmental initiatives at the municipal level and in the private sector for over 23 years. Daniel has worked for the Town of Richmond Hill since 1998 holding positions in several departments including Parks, Recreation & Culture, Engineering & Public Works and the Office of the Chief Administrator. In his current role as Manager of Grants & Strategic Initiatives at the Town of Richmond Hill, Daniel helped lead the People Plan Richmond Hill process to develop and implement a new Strategic Plan.

He has a Master’s of Science Degree from the University of Toronto and a Bachelor of Science Degree from Queens University.

People Plan Richmond Hill - Putting All the Elements of Strategic Planning and Strategic Implementation Together

In this informative and hands on session, participants will walk through a municipal success story in strategic planning. People Plan Richmond Hill transformed strategic planning in Richmond Hill from a strategic plan which largely sat on a shelf into a living strategic plan created and owned by community, staff and Council. Eight years later, Richmond Hill's strategic plan continues to guide our community into our future vision The session will walk through the approaches and techniques which were used at different stages of the plan's development, communication, implementation, reporting and performance measurement. It will explore techniques like appreciative inquiry and deliberate vs. emergent strategy, tackle how to adapt short-term implementation to a long-term vision in a disruptive environment, describe how Richmond Hill achieved alignment of all of its corporate plans and strategies, give guidance on how to choose and track meaningful performance indicators, and present on how the strategic plan transformed the organization, all the way from the formal structure to the staff culture.
Mr. Emmett has had an extensive career in public policy in both the developed and developing world, including Energy Mines and Resources, the Department of Minerals and Energy, Papua New Guinea, Environment Canada, the Auditor General of Canada, the Canadian International Development Agency and Natural Resources Canada. He retired from government in 2007 as Assistant Deputy Minister, Strategic Policy Sector with Natural Resources Canada. Mr. Emmett joined Sussex Circle, an Ottawa based consultancy, in 2007 as a principal.

In 2013, Brian Emmett joined Imagine Canada in the role of the Chief Economist for Canada’s Charitable and Nonprofit Sector. As Chief Economist, Brian is tasked with measuring the impact of the sector and bringing economic issues facing charities and nonprofits to the forefront of public policy decision makers.

Born in Sarnia Ontario, Brian Emmett studied economics at the University of Western Ontario in London, Ontario. He holds a master’s degree in economics from the University of Essex in England and did postgraduate work at the University of Western Ontario.

The presentation will show how confluence of future economic, demographic and cultural developments will impact on the charitable and nonprofit sector of Canada’s economy.

Rapidly increasing demands and slower economic growth will stress Canada’s ability to sustainably finance the sector’s efforts to combat poverty, care for the aged, provide arts culture and recreation and other high value mission-driven services. Projections will show a growing gap between what will be expected from charities and nonprofits and what they will be able to do with reasonable projections of revenue - a growing social deficit.

The presentation will show a social deficit ranging up to $23 billion in the year 2026 – a number that implies either substantial unmet social, cultural and environmental demands in 2026 or a significant increase in revenue generation by the sector. The presentation will conclude that meeting the challenge of a social deficit will require broad structural reforms both in the way governments fund and regulate the charitable and nonprofit sector and in the tools that charities and nonprofits use to fund themselves.
Dr. Tanai received a Bachelor of Engineering degree from Chulalongkorn University, a Master of Science degree from the University of Illinois at Urbana-Champaign, and a Doctor of Information Technology degree from the University of New South Wales. He also holds a certificate of Strategic Thinking and Management for Competitive Advantage from the Wharton School, University of Pennsylvania, and a certificate of Designing and Executing Strategy from Harvard Business School. Also, Dr. Tanai has been certified in Coaching from NeuroLeadership Group.

USING EMERGING BUSINESS OPPORTUNITIES (EBO) MODEL IN CORPORATE PORTFOLIO STRATEGIC PLANNING

This session puts participants on the fast track to learning and using Emerging Business Opportunities (EBO) model, a clear, robust, and powerful diagnosis and corporate portfolio strategy development tool, published in California Management Review and taught at Harvard Business School. Based on three distinctive business horizons, EBO model helps organizations churn out a winning profitable growth strategy through a well-mixed portfolio, explore new business ideas and innovation, and put in place the organizational management system necessary to ensure their success. More than a theoretical introduction, this session presents concise, multi-industrial examples, each drawn from strategy consulting projects delivered in the past two years and case studies from world-class companies. These examples demonstrate how EBO model is being used and benefited by real-world companies.
Session #12

DR. SEAN STEIN SMITH – RUTGERS UNIVERSITY

Dr. Sean Stein Smith, DBA, CMA, CPA, CGMA, CFE is an Assistant Professor of Professional Practice, at Rutgers University. Prior to his current role, Sean worked for several private sector organizations, both in the for profit and non-profit sectors, where he played key roles in technology upgrades, reporting improvements, and change management. He has developed and taught courses, both on-line and in-person, focusing on economics, corporate governance, accounting, and personal finance. Sean was awarded the IMA Young Professional of the Year award for 2016. Sean is a member of the Content Advisory Board of NJCPA Magazine, and has been featured in Accounting Today, Strategic Finance, IndustryWeek, Accounting Web, the CPA Journal, NJCPA Magazine, and numerous other academic and practitioner publications. Sean was selected as one of the NJCPAs “30 under 30” for 2015. A subject matter expert on the issues of personal finance, Sean also serves on the AICPA Commission on Financial Literacy, and has been quoted, featured, and recorded in multiple publications.

CONFERENCE DAY 1 THURSDAY MAY 25
14:45 – 16:00

QUANTIFYING THE QUALITATIVE - BETTER DATA & STRATEGIC DECISION MAKING

This session is focused on examining and analyzing emerging trends in the business marketplace, specifically the ideas of competitive theory and the multiple capital model. Drilling into these topics, this presentation will analyze market examples of competitive theory, and the implications this concept has for strategic planning and the execution of said plans. Additionally, the concept of a multiple capital model, a critical component of integrated financial reporting, introduces an entirely new mindset into how management professions should evaluate organizational information. The proliferation of information, both qualitative and quantitative, provides an opportunity for enhanced managed decision making - but what are the steps necessary to effect this desired outcome? Wrapping up this presentation, and prior to a Q&A session at the very end, a series of guidelines and suggested best practices will be provided for management professionals seeking both more information and a suggested path toward implementing these concepts at their respective organizations.
JAIME SCHONFELDT – iBOSSWELL, INC.

Jaime Schonfeldt, Consultant of iBossWell, Inc., has nearly a decade of experience achieving extraordinary results in all aspects of executive operational leadership. Jaime is particularly skilled in providing organizations the tools and resources they need to start on a path to long term growth and success. That skill set is perhaps best demonstrated by her work concurrently building and managing four successful businesses from scratch. With a natural entrepreneurial mindset, Jaime has built a strong reputation on her capacity to open, expand and transform businesses into thriving operations. She has an aptitude for finding "hidden" cost savings in multiple business areas, which in turn opens up cash flow thus providing organizations and their leaders the time and ability to focus on achieving the goal of sustained growth. Jaime’s previous work experiences include: Director of Finance, Community Lining Opportunities; Director, North Star Academy; President, Sky’s the Limit Childcare, Inc.; President Air Control Mechanical Inc. She holds a BS in Business Management from Friends University, and an MBA from Baker University.

DENISE MCNERNEY – iBOSSWELL, INC.

Denise McNerney, President and CEO of iBossWell, Inc., has more than 30 years of experience leading business operations and coaching managers in strategic planning, leadership and board development, business operations, team dynamics, healthcare service delivery, and customer relations in non-profit, government, and for-profit organizations. Denise founded iBossWell in 2000; this organization specializes in strategic planning, organizational change, leadership, team development, and executive coaching. Denise has co-authored the book “The PeoplePACT: Achieving Exemplary Performance through Humane Leadership”, a leadership guide based on her extensive experience in leadership development. She also led the development of creation of WePlanWell™, the new, first-in-class online planning tool and system, helping clients transform their strategic plan into action and high performance.

ASSESSING THE EFFECTIVENESS & SUSTAINABILITY OF YOUR PROGRAM PORTFOLIO

Before embarking on strategic planning or even budgeting, nonprofit leaders (charitable, government, association) and their boards benefit from a gaining a clear-eyed understanding of: the effectiveness of the portfolio of programs/services they provide; the marketplace in which they operate; and the financial ramifications of program delivery. Taking an organization to the next level in the future requires unambiguous, unbiased clarity about where it stands today. Portfolio assessment is the key to unlocking this knowledge.

Nonprofit organizations of all types must compete for resources. Because there is no room for direct duplication of services in most communities, it is

CONTINUED ON NEXT PAGE...
essential for these organizations to develop and follow a systematic approach to determine what to do more of, or less of, and what to start doing, or stop doing. These difficult decisions can become paralyzing when organizations try to make them without the necessary data.

In this hands-on workshop participants will be introduced to a robust process they can take home and put to work immediately to help guide decision-making about the future direction of programs and services.
A strategic management thought leader with exceptionally well-developed business acumen, Rossana Creo is well-regarded for facilitating the development and leading the execution of strategic plans, while ensuring organizational alignment that results in the attainment of business goals. She is a respected cross-functional collaborator, one who demonstrates a strong executive presence and secures adoption for the implementation of new ideas. As a direct result of Rossana’s analytical and management skills, she continues to add value to the United Nations Federal Credit Union (UNFCU).

In her current capacity as Assistant Vice President, Strategic Planning, Rossana directs various teams in the development and implementation of strategies that set the tone for the credit union’s decisions that serve over 123,000 members in 210 countries across six continents.

In a previous role, Rossana served as an Executive Analyst & Corporate Liaison during which time she focused on relationship building efforts within the UN System on behalf of the President/CEO. Appointed the leader of an eight-person team, Rossana served in a leadership capacity that resulted in the production of a comprehensive analysis of the financial industry, UN System, globalization, economy, social habits and trends, demographics, and government relations from which decisions were made.

In collaboration with the CEO, Rossana participated in designing a metrics dashboard for the corporate incentive program.

Rossana completed her Master of Arts in International Political Economy & Development from Fordham University. She completed her Bachelor of Arts in International Relations. To continue to advance her skills, Rossana completed the Strategic Management Certificate Program from St. Bonaventure University. She is also a certified Strategic Planning Professional (SPP) via the Association for Strategic Planning.

CULTURE EATS STRATEGY FOR BREAKFAST: USING STRATEGIC COMMUNICATIONS TO MANAGE CHANGE AND CREATE ORGANIZATIONAL ALIGNMENT

“Culture eats strategy for breakfast.” - Peter Drucker

Research substantiates that 90% of companies fail at strategy execution. One of the most important aspects of strategy management that is often overlooked is communication. However, communication is key to ensuring successful strategy execution. In fact, the greatest strategic plan will never make it to execution without well thought out and effective internal communication. In the wise words of management guru Peter Drucker, the reason has to do with culture, or the values and behaviors of people. People in addition to measures and rewards and structure and processes need to be in alignment for an organization to effectively execute on its vision; and you cannot win the hearts and minds of your people without effective strategic communications. This session will focus on best practices for internal strategic communications, which help create awareness, impart knowledge, generate interest and support, shape attitudes, and ultimately drive participation and action towards executing strategy. Examples from the United Nations Federal Credit Union’s (UNFCU) strategic communications plans will be shared.
BRETT KNOWLES – PERFORMANCE MEASUREMENT & MANAGEMENT (Pm2)

Brett is a long-time Thought Leader in the Human Capital Strategy Execution space. With over 3,000 clients in virtually every sector and from around the world, Brett and his teams bring a pragmatic “been-there / done-that” approach that has a bias for action and focuses on transferring the skills into their clients.

His client work has been published in Harvard Business Review, Forbes, Fortune and countless other business magazines, books and periodicals. Four of Brett’s clients have been presented the prestigious Balanced Scorecard Hall of Fame and his clients have been profiled in every book by Drs’ Kaplan and Norton.

Brett has written over 200 articles and blog postings and over 450 videos and is a popular speaker at conferences and seminars.

Brett’s clients talk about his simple, rapid-deployment approach as key to their success, but the deep ownership and understanding Brett’s teams build as the reason for the high sustainability. (Research indicates over 90% of his objectives and accountability processes are still in use 5 years after they were launched).

In addition to his work at Skandia, Stockholm, that lead to the term “Human Capital”, Brett has also conducted research, published articles and consulted in:

- Accountability Statements
- Balanced Scorecard
- Gamification of Business
- Job Function Deployment
- Objectives and Key Results (OKRs)
- Role clarity

THE PERSONAL STRATEGIC SCORECARD

Strategy execution happens at the individual level…day to day people either contribute to strategic success or are wasting their time and resources. With the advent of OKRs (Objectives and Key Results), better software solutions, and the application of game-mechanics, we are cascading strategy down to the team and individual level.

Individuals can now clearly understand (and feel proud of) their purpose, see their progress, make autonomous decisions aligned to strategic success, and talk to others about their work! The annual performance review is becoming a thing of the past.

This seminar will cover best-practices being developed by international organizations like Google, Canadian businesses like Canadian Western Bank and governmental bodies like the City of Atlanta. Our speaker, Brett Knowles,
Learning Outcomes:

• Learn the latest developments in cascading strategy to teams and individuals
• Understand how to apply these principles in your organization
• Assess the benefits to your organization from individual scorecards
TOM WITTY – AMERICO FINANCIAL LIFE INSURANCE CO.

As Director – PMO and Strategy Development, Tom oversees Americo Life Insurance’s corporate development efforts in the areas of strategy and project management, and capital planning and budgeting. He’s responsible for the administration of America’s corporate strategy and the underlying project management portfolio. In addition to his strategy management duties, he leads the Project Management Office and Project Managers in the day to day execution of the company’s strategic projects and he chairs project governance committees and review boards.

Prior to joining to America, he held executive and management positions at a Fortune 500 logistics company, leading the organization in the areas of engineering, marketing, IT, operations, program management and strategy development.

Tom has a B.S. Industrial Engineering from the University of Tennessee, and a M.B.A. from Keller Graduate School of Management. He is a PMP, Project Management Professional and he’s been an active member of ASP for almost ten years, recently receiving his SMP designation. He also has his FLMI, Fellow Life Management Institute certification in insurance operations.

BRIDGING THE GAP BETWEEN BUSINESS STRATEGY AND PROJECT EXECUTION

In many organizations there is a space that exists between the Business Strategist and the Project Manager. And in this discussion, we hope to bridge that gap. By contrasting the books of knowledge for project management and strategy management, this presentation will identify the relationships and opportunities that line up between the strategic intent of an organization and the initiation, planning and execution of projects. We will talk about how successful organizations can best leverage these two inter-related, but sometimes remotely separated roles and functions.

The four key areas in ASP’s BOK, Lead, Think, Plan and Act, have key implications on project management, portfolio management and the PMO. By better understanding these implications, the presentation will highlight how strategies and projects can co-exist in a mutually beneficial way. It will help bring out how project and strategy management practitioners can have a more strategic view of their roles when working on projects and conversely a greater awareness of execution as they develop strategy.
AGILE SMACKDOWN!

Are you wrestling with how to get beyond theory and move toward practical, implementable tactics to truly achieve organizational agility? Agile is growing in popularity as a buzzword, much like ‘strategy’, ‘innovation’, and ‘disruption’, liberally sprinkled throughout the organization. Our provocative panel will tag team this topic, sharing their insights, challenges and lessons learned in increasing their organizational agility. Our moderator will set the stage for the discussion with a brief presentation, creating the ring within which our panelists will dialogue, discuss and debate. Our diverse panel will represent a broad range of perspectives from multiple disciplines and backgrounds.

CHRIS HAFNER – THINK ASPIRANT

 Moderator

Chris is a successful entrepreneur, innovator, strategist, author and speaker, applying his keen discernment to help leaders and their organisations identify the right problems to solve to help them overcome some of their most complex strategic challenges. Chris is passionate about unleashing potential in people and organisations to create financial, economic & societal value.

HOWARD ROHM – BALANCED SCORECARD INSTITUTE

 Panelist

Howard Rohm is the Co-Founder and Owner of the Balanced Scorecard Institute, and Founder and Owner of the Strategy Management Group, Inc., the Institute’s parent company. He is a performance management trainer, author, consultant, and technologist with over 40 years’ experience. Howard has helped dozens of organizations worldwide build balanced scorecard and other performance planning and management systems. Howard developed the Institute’s Nine Steps to Success™ scorecard methodology and certification program. His balanced scorecard and performance management systems have been adopted by over 200 organizations worldwide.
Howard has a Master’s degree in engineering from George Washington University, a Bachelor’s degree in engineering from Iowa State University, and three professional certifications: Performance Technologist, Strategic Management Professional, and Balanced Scorecard Master Professional. He is a Strategic Planning Pioneer, and co-author of the Association of Strategic Planning Body of Knowledge for the profession.

He serves on the Association’s Board of Directors and certification examination and strategic planning committees. He is a winner of a team Hammer Award for his work on government performance reform (given by Vice-President Al Gore’s National Partnership for Reinventing Government), and received a Presidential “1000 Points of Light” award for community service from First Lady Barbara Bush at a White House ceremony. He recently was awarded a Triangle (Raleigh, NC) Top 50 Entrepreneur award by Business Leader magazine.

ALAN LEEDS – AGILE STRATEGY MANAGER
Panelist

Alan is the president of Agile Strategy Manager, a strategy to execution software division of Y-Change, Inc., a software company enabling progressive companies to convert strategy into reality. His expertise in agile strategy deployment, execution, change management methodologies and online software has helped companies deliver tangible operating results in organizations such as Raytheon, Cisco Systems, Texas Instruments, Abbott Medical Optics, and Great River Energy.

As a thought leader in strategic planning and agile strategy execution, and in the strategy community, he has produced high quality software tools for planners across the country. Alan holds a Master’s Degree from SUNY and a BS from Syracuse University.

As an award winning magician, he often incorporates magic into his presentations.

CONFERENCE DAY 2 FRIDAY MAY 26
09:05 – 10:00
Session #17

DR. JOHN LABRIE – NORTHEASTERN UNIVERSITY - TORONTO

John LaBrie, Ed.D is the first leader of Northeastern University Toronto. He is responsible for leading the academic mission of Northeastern in Ontario, leading global strategy development for Northeastern University Global Network, and expanding education and employer partnerships around the globe.

John is a recognized leader in program growth and innovation, especially in areas that provide enhanced access for returning adult, international, at-risk, and distance learners. Previously, he served as Dean of the College of Professional Studies and Vice-President for professional education, Northeastern University. In this role he established the Graduate School of Education, launched the Lowell Institute School as a first-in-the-United States school dedicated to transfer STEM education, expanded the faculty of the College with 85 new faculty lines and created new degrees at the undergraduate and graduate levels. Under his leadership the College increased its international student body by 95%, contributing to Northeastern’s move upward to 6th among the top 25 U.S. institutions hosting international students (IIE, 2015.) He established Northeastern University’s Online Experiential Learning unit, which develops courses and programs for students with experiential learning as a key ingredient of course development.

He joined the Northeastern faculty in 2009 as a senior fellow teaching in the Doctor of Education program, and continues as Professor of the Practice. Prior to joining Northeastern, Dr. LaBrie served as dean of continuing studies at Simon Fraser University in Vancouver, British Columbia, where he led the largest continuing education university program in western Canada.

Dr. LaBrie earned his bachelor's degree in French from the University of Maine at Fort Kent, an MSA in management from Saint Michael's College, and an EdD from the University of Pennsylvania.

NAVIGATING CHANGE USING STRATEGIC DIRECTION: ONE UNIVERSITY’S JOURNEY THROUGH DISRUPTIVE CHANGE

Northeastern University has embarked on a strategy to become a global university with both an intellectual and academic reach as well as geographic footprint to match. Its 2025 goals include 100% participation of its graduates in an international experience. These bold and aggressive goals are informed by a strategy developed in the previous 10-year plan.

This presentation will look at several elements of the previous ten-year plan and how the strategy set forth by a new administration propelled the institution to rise in prestige and influence. The case will look at, among other things, several strategic initiatives and investments that were made and how these efforts evolved. Often seen as contrarian by its peer institutions, Northeastern took periods of disruption and used them to the institution’s advantage by taking bold moves and iterating as it went. The institution’s ability to grow a regional campus network, dramatically increase international participation, increase in the US and International rankings came about through a fixation with innovation, quality and growth.

CONFERENCE DAY 2 FRIDAY MAY 26
10:45 – 12:00
JENNIFER BAKER - AMTRAK

Jennifer Baker is a PfMP, PgMP, PMP, MBB, BRMP and ITIL certified manager with more than 25 years of experience spanning multiple industries. Her undergraduate work was completed at the University of North Carolina at Wilmington. She holds a Master’s degree from Northeastern University and is a graduate of the 2015 PMI Leadership Institute's Masters Class. Jennifer is the Director of the Project Management Center of Excellence at Amtrak and an Adjunct Professor at Northeastern University, Georgetown University and Wake Forest University. She is the president of the PMI-Metrolina chapter which won the 2015 PMI Chapter of the Year award and the incoming mentor for PMI’s 5th Region – the largest in the world.

In 2013, she was featured in a portfolio management article called “Going the Distance” in PM Network magazine. Through Duke Energy, she was both an Alpha and Beta Contributor for PMI’s “Navigating Complexity” guide published in 2014. She wrote a chapter in the Portfolio Management compilation edited by Dr. Ginger Levin entitled, “Portfolio Management: A Strategic Approach” which was released in October 2014. In 2015, her team completed a pilot study for PMI’s Business Analysis framework leading project teams within Duke Energy. She has been a guest lecturer and consultant for the University of North Carolina at Charlotte, Georgia Regents University and Georgetown University and speaker for several companies and organizations including the National Health Informatics Association, Project Management Institute, American Association of Cost Engineers, Lowe’s Home Improvement, Textron, TIAA-CREF and the Society of American Military Engineers.

WHAT GOOD IS STRATEGY IF YOU CAN’T IMPLEMENT IT?

There are fundamental reasons why strategy is imperative for the success and sustainability of every organization yet more than 60% of businesses fail to effectively execute their strategy. Several organizations have researched this phenomenon and uncovered key reasons why these implementations fail. Learn what these are and the essential steps to successful strategic implementation.
Diane Meister leads Meridian Associates Inc., a Chicago-based growth consulting and advisory firm that helps organizational leaders and boards of directors ensure their firm has identified and is effectively addressing the challenging and unique strategic risks that face every organization today.

A leading voice on the use of scenario-based strategy to develop and execute results-driven growth plans, Diane has partnered with organizational leaders across more than 35 industry sectors and, along with her Meridian team, guided over 140 strategic growth initiatives during her career. With an Executive MBA from the Kellogg School of Management at Northwestern University and prior career with two leading international advertising agencies, she brings expertise in strategic planning, corporate marketing and brand strategy, market innovation and new product development to all client engagements.

Diane has been a featured speaker at Northwestern and DePaul Universities in Chicago as well as at national conferences and webinars for groups such as Opal Events’ Medical Devices Summit and the Association for Strategic Planning (ASP). She is a founding member of the Women’s Network of the Chicago Association for Corporate Growth, member of the Private Directors Association, past board member of ASP’s Chicago chapter and founding member and past chair of the Kellogg Alumni Club Entrepreneurship Network.

Neelima Firth is an innovative biopharmaceutical leader with a record of turning projects into successful products to enable patients to access the medical treatments that they need to get well.

Neelima has had a successful 30-year career in clinical project management, reimbursement and strategy for companies including Amgen, Bristol Myers, GSK and the Alfred Mann Foundation. She has had extensive consulting and work experience in commercialization and reimbursement including Medicare, Medicaid and Managed Care strategies, marketing, project management and financial analysis.

She was an early Amgen employee and established Amgen’s initial presence in the UK. At Amgen she held a variety of roles including Associate Director of Medicare and Medicaid Marketing, lead on compendia and AMCP dossier creation for new products, and Director of Strategic Planning for Enbrel, managing the alliance relationship with Wyeth and the development of the Enbrel business plan.

At the Alfred Mann Foundation, she led the team to evaluate, prioritize and monetize research projects. These plans translated to two projects that were spun out into two companies, Axonics Modulation and Medallion.

Conference Day 2 Friday May 26
10:45 – 12:00
Therapeutics. She has led strategy facilitation sessions including scenario planning for commercial, payor and competition strategies.

Neelima has an MBA (summa cum laude) from Pepperdine and a BSC in Information Science from Leeds Metropolitan University. She is a past President of the Association for Strategic Planning, an iCorp California evaluator for Biotechnology and an Entrepreneur in Residence at the Children’s Hospital of Los Angeles.

OUTFOX ORGANIZATIONAL RISK WITH SCENARIO-BASED STRATEGIC PLANNING

Managing risk, particularly strategic risk, is one of the most significant challenges facing today’s organizations. Yet few organizations find themselves adept at identifying, and/or addressing, the major risks they are assuming as they create and execute future plans. In a world where the future of virtually every industry will likely look very different from its past, how do leaders better ensure they are recognizing and effectively addressing their most important organizational risks?

Scenario Planning offers an important answer. This presentation introduces a Scenario-Based Strategic Planning process and details the important role scenarios play in the identification and implementation of new, “early bets” for an organization – early bets that either address important organizational risks or take advantage of potential high-return opportunities.

Join Diane M. Meister, founder and CEO of Meridian Associates and colleague Neelima Firth, former ASP President and healthcare industry expert, in this interactive session where participants will:

• Understand the 7 risks all organizations face
• Learn a valuable process for identifying and prioritizing organizational risks
• Apply Scenario-Based Planning methodology in three different industry case studies
MICHAEL ABREY-BUGG – STRATEGIC PLANNING SOCIETY

Michael developed the largest UK energy retail affinity business over the past 10 years. He built a business affinity model between E.ON and the charity Age UK that offered an attractive energy tariff to customers. This energy affinity scheme achieved over 400k customers who demonstrated extremely high levels of loyalty. In 2016 he took over the Financial Services business unit of Age UK enterprises and has achieved a 5 fold increase in revenues going into 2017.

Michael began his career with Eastern Electricity on the electricity distribution network. He has experience and knowledge of remote switching, telecommunications monitoring of networks and demand side management. In the UK energy retail business, Michael has developed market entry strategies for Eastern Electricity, acquiring new commercial customers in the UK energy market. Michael created for British Gas their entry strategy into the small media enterprises (SME) business market.

Michael has a Master’s degree in business administration, holds a diploma in marketing and an HNC in electronics and telecommunications. He is Deputy Chairman and Trustee of The Strategic Planning Society. He is a member of the All-Party Parliamentary Group on Smart Cities. Michael has been a toastmaster for five years.
Panel Discussion

DISRUPTION IN HEALTHCARE: LEADING STRATEGY IN THESE CHALLENGING TIMES, A HEALTHCARE PANEL DISCUSSION.

Whether in the United States, Canada, or abroad, hospitals, clinics, medical device manufacturers, and pharmaceutical organizations are all facing the challenges of immense change. From “repeal, amend, and replace” to changes in reimbursement and coverage thresholds, our panel of healthcare leaders and clinicians will dive into methods they are using to lead and manage strategy to ensure a stable bottom line at their organizations in this era of disrupted market dynamics.

CHINUE UECKER – ICMC
Moderator

Chinue Uecker’s career focused on process improvement and project management within banking, engineering, healthcare, and sales organizations. She began her career as a Chemical Engineer at Abbott Laboratories in North Chicago, Illinois. In 2005, she joined GE Healthcare (GEHC) in Milwaukee, Wisconsin as a Manufacturing Manager. At GEHC, she led a team of 50 employees and served as the Plant’s Standard Work Team leader. In 2009, she formed LPI Consultants and successfully led initiatives across the Americas, Australia, China, Europe, and Japan.

MICHAEL KESSEL, MBA, CPA – CLEVELAND CLINIC CANADA
Panelist

From December 2011 to present, Chinue has served as a Lean Six Sigma Master Black Belt, Strategic Planning and Deployment Manager, Strategic Business Assessment Manager, and Manager of Knowledge Management. She trained and mentored 20 Green Belts and co-facilitated various workout events; worked closely with the Strategic site leads to facilitate operational planning; provided regional environmental scans to senior leadership teams; and facilitated strategy sessions.

She is a certified Black Belt from University of Texas at Austin, Master Black Belt from Villanova University, Strategic Planning Professional from Association for Strategic Professionals, and Change Leader from Cornell University. She is pursuing her Doctorate of Business Administration at Walden University. Her specialization is Healthcare Management. Her doctoral proposal focuses on exploring financial strategies and initiatives for preventing rural hospital closure.

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Prior to joining Cleveland Clinic in 2009, Mr. Kessel was Co-founder and Vice President of Business Development and Finance for the Center for Partnership Medicine at Northwestern Memorial Hospital /Trio Health in Chicago. In this role, Mr. Kessel was instrumental in the development of a network of executive health and wellness programs with leading medical centers throughout the United States. The program was ranked as one of the top in the country by Forbes and Fortune magazines.

Mr. Kessel was also Finance Manager and then Interim Finance Director for Cardinal Health Medical Products and Services, a manufacturer of medical, surgical and laboratory products in Illinois. Additionally, he was Co-founder and the Chief Financial Operations Officer for Ignition State Group, LLC, a web strategy and development firm based in Chicago.

In addition to his work at Cleveland Clinic Canada, Mr. Kessel is active in the Toronto community as a board member of the Heart and Stroke Foundation of Ontario and a committee member of the Conference Board of Canada. He is also an active member of Young Presidents Organization and serves on the Maple Leaf chapter’s New Member Committee.

Dr. Charanjit S. Rihal, M.D., B.Sc., B.Sc. (Med), M.B.A., is Chair of the Department of Cardiovascular Medicine at Mayo Clinic, former director of the Cardiac Catheterization Laboratory at Mayo Clinic. Dr. Rihal is the William S. and Ann Atherton Professor of Cardiology and has held the academic rank of Professor of Medicine since 2004. Dr. Rihal received B.Sc. and M.D. degrees from the University of Manitoba and completed an internship in special mixed medicine at the University of Manitoba. At Mayo Graduate School of Medicine, Dr. Rihal completed a residency in internal medicine, a fellowship in cardiovascular diseases, and a fellowship in interventional cardiology. He further received the M.B.A. degree from Carlson School of Management at the University of Minnesota, and holds a Diploma in Strategy and Innovation from the Said School of Business, University of Oxford.

As a cardiologist, Dr. Rihal specializes in interventional cardiology, with a focus on new device therapies for the minimally invasive treatment of valve and other structural heart diseases.

As a physician-leader, Dr. Rihal is committed to providing efficient cost structures and developing innovative ways to deliver value in a complex and changing healthcare environment.

The principal investigator on multiple research grants, Dr. Rihal oversees studies focusing on structural heart disease (for example percutaneous valve therapies), clinical trials in coronary artery disease, and using genomics to guide anti-thrombotic therapy in coronary artery disease. His research has been...
Head of Business Operations & Strategy. The focus of this role was both day to day business operations of the division, as well insuring implementable strategies are developed. Medicinal Sciences encompasses the groups focused on discovery, formulation, and early manufacturing of the large molecule, small molecule, cell and gene therapy programs in Pfizer R&D. Prior to this Devyn was Head of Strategy for the Pharmatherapeutics Division of Pfizer R&D focused on developing and implementing core strategies in Winning by Design in Small Molecules as well as optimizing the ROI on novel technology inventions.

Prior to this, Devyn was part of Pfizer's Neusentis Research Unit in the UK as Chief Operating Officer responsible for strategy, operations and implementing key strategies. In addition, he supported the Pharmatherapeutics Global Clinical Research Organization as the Chief Operating Officer. He joined Pfizer's Strategic Management Group in August 2009.

Prior to joining Pfizer, Devyn was a principal for The Frankel Group (a boutique management consulting firm in New York City and Cambridge). In his consulting experience, Devyn led a wide range of projects, across multiple therapeutic areas and a host of technology platforms, including basic R&D tools, regenerative medicine, gene therapy, and macromolecules/biologic products. Client relationships have ranged from large pharma to small biotech companies. Regenerative Medicine has been an area of strong focus with over 30 engagements, several published papers, and numerous invited conference presentations. Prior to joining The Frankel Group, Devyn worked as a management consultant at Adventis Corporation focused on clients in information intensive companies.

Devyn received his Ph.D. in Genetics from Harvard Medical School where his research culminated in 12 publications in leading journals such as Cell, Nature, and Development. He also holds an MS in Biology from Idaho State University and a BS in Zoology from Brigham Young University.
JESSE RUSSELL – BIG PICTURE RESEARCH AND CONSULTING

Dr Russell, president of Big Picture Research and Consulting, uses empirical data and definitive research to help you and your organization achieve strategic goals. He brings expertise and knowledge of critical issues in organizational design and system improvement efforts.

Previously, Dr Russell served as chief program officer and director of research at the National Council on Crime and Delinquency. Before that, he was research manager at the National Council of Juvenile and Family Court Judges. He completed his doctorate at the University of California, Santa Barbara. He was a faculty professor at Seton Hall University, where he taught courses in research methodology.

He has consulted with major government agencies like the California Department of Social Services and the Georgia Department of Juvenile Justice. He has provided research and data analytic services internationally for Singapore, Taiwan, and Australia. He has given expert testimony on prevention science to elected officials, such as the United States House of Representatives.

His work has been featured in a number of media outlets like Fast Company, the Huffington Post, and Governing magazine. Dr Russell has been profiled in industry publications, such as the Chronicle for Social Change, Non-Profit Quarterly, and the Juvenile Justice Information Exchange. His scholarly works have been published by Child Abuse & Neglect The International Journal, Journal of Juvenile Justice; Children and Youth Services Review; and Psychology, Public Policy, and Law.

DON QUIXOTE OR SANCHO PANZA: WHO IS DOING YOUR PLANNING?

This session will engage participants in an interactive exercise in understanding, identifying, and leveraging the story of Don Quixote and its character typologies. Whether planners and collaborative planning teams are more like Don Quixote (courteous but imperious, sincere but rigid, and refined but judgmental) or like Sancho Panza (compassionate but simple, curious but uncouth, and earthy but saucy) offers a useful juxtaposition of the trade-offs, strengths and weaknesses, pluses and minuses that can inform how plans are made and executed. This session will outline and offer a rubric to identify how much each participant is currently embodying either Don Quixote or Sancho Panza. It will lead participants through an exercise to understand how the best plans are made with both Don Quixote and Sancho Panza are welcomed and valued members of collaborative planning teams.
Session #22

PAMELA LOMAX – YZ STRATEGIES

Pamela Lomax is a consultant with YZ Strategies, a new organization that assists government and nonprofit organizations with strategic planning. Pamela is also Deputy Auditor in the Massachusetts Office of the State Auditor where she manages the administrative and financial operations of the Office, including the Operations, Information Technology and Human Resources units. She also oversees a special project conducting an analysis of the impact of the Commonwealth’s healthcare cost containment law.

Pamela has extensive administrative experience in state government, higher education and community-based organizations. She has served as Assistant Vice President of Advancement at Suffolk University and managed fundraising staff at Harvard University and Massachusetts Institute of Technology.

Pamela is active in the Boston community and puts an emphasis on volunteer work with youth-serving organizations. She was founding director of development for a Boston charter school, a founding board member with another charter school and has served on the boards of two independent schools. She currently volunteers as a facilitator for salary negotiation workshops for women, a joint initiative between the City of Boston and the American Association of University Women.

IT'S NOT JUST FOR SENIOR MANAGEMENT - CASE STUDIES USING AN INCLUSIVE STRATEGIC PLANNING PROCESS

Tasked with leading the development of your organization’s strategic plan? Working to determine how to engage employees in the plan development process? Committed to using an inclusive approach to all employees ‘own’ the plan? Learn how to help employees at all levels take ownership of the actions and outcomes articulated in the strategic plan. This session presents case studies and shares practical tools to assist you in designing and implementing a planning process that is inclusive and acknowledges employees as a key stakeholder group. Participants will gain key insights and learn straightforward ways to engage all staff in the planning process. The focus will be on strategic planning in state and local government but the information presented is applicable nonprofits.
CHRISTINA BURNS BRUCE – CITY OF VAUGHAN

Christina Burns-Bruce, MCIP, RPP, is the Senior Manager of Strategic Planning at the City of Vaughan. She is an innovative and energetic strategy development professional with almost 20 years of experience planning, implementing, managing and leading strategic planning projects for municipalities and organizations across Canada. She has worked closely with Mayors and Council, all levels of Staff, stakeholders and the community-at-large to develop and create community visions, goals, objectives, actions, implementation strategies and key performance indicators. She was a key player in developing the new Strategy Map for the City of Vaughan and introducing the City to the supporting transformation journey.

Prior to joining the City of Vaughan she worked as a consultant planning, implementing, managing and leading strategic planning projects for First Nation communities, municipalities and organizations across Canada.

THE STEWARDSHIP OF SERVICE EXCELLENCE AT THE CITY OF VAUGHAN: MEASURING OUR SUCCESS

With the vision of being a ‘City of Choice’, Vaughan has committed to a Term of Council Service Excellence Strategy Map focused on delivering council commitments for the remaining term of council. This commitment involves improving citizen experience through service delivery and managing growth; operating more effectively and efficiently and improving staff engagement.

At this workshop, Vaughan will share how they embarked on transition process to design and implement an innovative approach to developing a refocused strategic plan aimed at fostering a shared vision and culture of Service Excellence.

The City of Vaughan has achieved a number of critical milestones during this process, including unanimous council approval of the Service Excellence Strategy Map, a shared mindset and commitment to Service Excellence, an organizational design and alignment of the City’s three-year budget with the priorities and goals of the Strategic Plan, while keeping the tax rate in line with targets set by Council, more engaged staff and recognition on the importance of using performance information to manage strategy execution.

CONFERENCE DAY 2 FRIDAY MAY 26
14:15 – 15:30