



The Institute for Strategic Clarity currently offers the following courses. Please contact James Ritchie-Dunham (jimrd@instituteforstrategicclarity.org), the Institute’s president, for further information.

Course Listings

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Accelerating Performance Improvement

You’ve restructured, implemented new information systems, established quality programs (Six Sigma, TQM), set stretch goals and implemented incentives programs - and still the performance improvements your company hoped for have not materialized. The Accelerating Performance Improvement (API) Workshop provides leaders with a methodology for streamlining their organizations and eliminating redundancy, bureaucracy, and archaic rules, regulations, policies and procedures. This workshop blends highly effective approaches to change and performance improvement that have used by organizations like General Electric, Virgin Atlantic Airways, Acterna and the

Central Intelligence Agency to simplify and streamline their operations. This workshop will outline the process and provide a framework for continuous improvement in your organization in a way that will instill a sense of empowerment and enable the workforce to envision and implement performance enhancing change wherever and whenever it is needed.

Time: 3 Days

Lead Facilitator: Charlie Tweedly

Facilitation: 2 Facilitators

Applied Strategic Clarity

In this applications course, you experience the full suite of Strategic Clarity tools, developing a strategy map of your organization and diagnosing it. We finish with 2 half-day follow up sessions to support further development. This course provides you with strategic clarity about your organization and competence in Strategic Clarity tools. For your organization, it delivers a strategic clarity map of the organization, as well as identifying potential leverage points for organizational improvement.

Time: 6 Days

Lead Facilitator: James Ritchie-Dunham

Facilitation: 2 Facilitators

Business and Society: A Core Competencies Perspective

Business is one of the critical systems of societies. Its effectiveness arises from business' ability to take action based upon the key "logics" or ideas that distinguish it from the other two key systems: government and civil society. Globally the relationship between business and these other two systems takes different forms given different histories, values and cultures. However, a common element in the emerging business model is the building of business relationships with other parts of society, based upon increasing knowledge about business strengths and weaknesses and how to combine them with, for example, those of government to produce much more effective outcomes for all. This is producing innovation and new solutions for issues such as poverty and environmental degradation, while at the same time enhancing business outcomes

Time: 1-2 Days

Lead Facilitator: Steve Waddell

Facilitation: 1 Facilitator

Conversational Strategic Clarity

To be more competitive in increasingly unforgiving markets, all organizational leaders need to increase the clarity with which they understand and communicate their organization's strategy. In this course, you learn about a dynamic, systemic approach to managing your organization and the people that make it happen. You begin to ground these learnings through individual and group exercises and case studies. For you this course delivers insights into the dynamics of organizations and the people in them, as

well as comfort with using Strategic Clarity concepts. For your organization, this course identifies potential areas for significant improvement in organizational efficiency.

Time: 3 Days

Lead Facilitator: James Ritchie-Dunham

Facilitation: 1 Facilitator

Decision Making in Dynamic Environments

Within organizations you will make thousands of critical, strategic decisions. You will make these decisions in an ever-changing, complex environment. This course prepares you for this daunting task. Using readings, case studies, and interactive computer simulations, you will learn about the following basic topics:

- **Decision Components.** Decisions are comprised of value judgments about what the organization and its stakeholders want to achieve, factual judgments of how the organization works, and the linkages among the value and factual judgments. Various theories exist to describe these components, from probabilistic theories such as multi-attribute utility theory and decision analysis to continuous, dynamic theories such as system dynamics. These theories provide the basis for eliciting and assessing these components.
- **Methodologies and Technologies.** Different methodologies and technologies exist to support the three decision components. We will explore methodologies for decision making in dynamic environments, which unite and support these different decision components. We will also explore the different decision support system technologies (i.e., enterprise information systems and balanced scorecards) that support dynamic decision making.
- **Influence on Organizational Performance.** Theory and practice indicate that decision methodologies and tools influence the decision components of the decision maker. In turn, these decision components influence organizational performance. We will experience first-hand how these decision tools influence our decision making in dynamic environments.
- **Application Arenas.** Different approaches to decision making perform best under different circumstances. We will use a framework that highlights the strengths and weaknesses of each approach for different aspects of decision making in dynamic environments.

Time: 5 Days

Lead Facilitator: James Ritchie-Dunham

Facilitation: 1 Facilitator

Designing Organizations

There is a dual agenda facing corporations today: balancing the demands for the profitability of the business with the need to create exciting, energizing and meaningful work environments for employees. In the Designing Organizations workshop participants learn how to integrate strategies, structures and processes to create highly motivating, high performance work environments. In this workshop participants move

from thinking through the strategic view of the organization all the way down to the operational structures and processes needed to sustain the organizations effectiveness.

Time: 3 Days

Lead Facilitator: Charlie Tweedly

Facilitation: 2 Facilitators

Developing Value Maximizing Strategies

The ultimate responsibility of organizational leadership is the creation of value for the organization's owners. Based on years of experience in developing value-based management frameworks and implementing them with leading organizations around the world, this course makes the case for the linkage between strategy and value-based management.

Time: 2-3 Days

Lead Facilitator: Andreas Koch

Facilitation: 1 Facilitator

Dynamic Balanced Scorecards

Every Fortune 1000 company has implemented some form of the Balanced Scorecard. In collaboration with the creators of the Balanced Scorecard, this course brings new crucial dimensions to the development, communication, and implementation of the Balanced Scorecard. Research and experience with the many organizations that have developed performance measurement scorecards show four areas critical to successful implementation: explicit cause and effect relationships, metric selection, simulation, and communication. Traditional scorecards keep cause-effect relationships implicit, selects financial metrics, uses financial what-if simulations in spreadsheets, and communicates only with numbers. The Dynamic Balanced Scorecard makes causality explicit and rich, uses holistic and well tested means for selecting measures, tests the measures in mental and computer simulations, and communicates through numbers and experience-based relationships. This course enables you to improve upon your organization's existing Balanced Scorecard, or to help you build a new Balanced Scorecard that is more powerful than the traditional scorecards. Personally, you will develop the modeling and Systems Thinking skills needed to enable you to construct a first-pass Dynamic Balanced Scorecard for your organization.

Time: 4 Days

Lead Facilitator: James Ritchie-Dunham

Facilitation: 2 Facilitators

Emerging Leadership

This course is designed to enhance the leadership skills of professionals by focusing on the notion that Clarity is the Essence of Leadership. The program utilizes an introspective look into the capacity of individual attendees and their organizations, increasing their ability to develop robust leadership skills and greater organizational understanding.

Attendees of this program will understand how to impact the performance of themselves and their organization without adding or subtracting from current resource levels.

We believe that true Leaders today and future leaders of tomorrow's organizations must be able to handle complex systems in a chaotic environment while utilizing introspection, fluid leadership styles, and enhanced interpersonal skills to gain clarity - prior to making decisions. At each point throughout the programs five modules, attendees are directed to focus the development of their own internal capacity as a means of increasing the overall organizations performance. Our program increases strategic understanding and enhances performance by utilizing team projects, individual assignments, action learning, benchmarking, and personal coaching.

Developed and delivered by top academic faculty and seasoned organizational practitioners, we are confident this program will implement positive change and create new dimensions of strategic thinking in attendees. Professionals attending this program will return to their organization with a clear understanding of how and specific competencies for leading their organizations resourcefully.

Time: 5 or 10 Days

Lead Facilitator: James Ritchie-Dunham

Facilitation: 4 Facilitators

Implementing Capitalist Management Techniques in Economies of Change

This course focuses on questions concerning the implementation of modern management techniques formed in "capitalist" systems of economy in economies of change such as the former GDR where the instructor has been working for ten years. Especially items such as marketing, quality orientation, customer relationship management and change are of high importance. One of the main lessons learned during the instructor's working experience and life in a former socialist society is that the human factor is extremely decisive in processes of change. There is a lot of resistance one has to deal with: mental models, fears, routines, a different type of logic, a "centralist logic", excesses of bureaucracy, different understandings of single words, etc. As long as you deal with more technological questions such as production and planning these different attitudes and skills might be very helpful also within a new economic and social system. But in more soft parts of the business such as strategy, marketing, change and general management they are the main problem. Therefore those dealing with the technological part of the transformation of socialist organizations into market organizations very often feel that the communist socialization of their staff is perfect for capitalist needs. While those responsible for the soft part are at once confronted with two problems of mentality: the "old" mentality of the "found" staff they want to change and the one of the new technology guys who misinterpret the "old" mentality as virtuous.

Time: 2-3 Days

Lead Facilitator: Claas Cordes

Facilitation: 1 Facilitator

Introduction to Strategic Business Simulation

The first part of the course is designed to introduce the basic concepts of system dynamics and to gain awareness of how these concepts may be applied to multiple corporate issues. The second part of the course focuses on studying a few simple models that emphasize key business areas, such as corporate strategy, finance, production, planning, human resources and process redesign, among others. The participants, working together in teams, have the opportunity to experiment with each of these models and to learn what behavior each of these structures generates over time. The purpose is to familiarize the course members with various generic business structures and to begin to understand how they may apply to specific business issues.

Time: 3 Days

Lead Facilitator: Hal Rabbino

Facilitation: 1 Facilitator

Introduction to Strategic Clarity

This course introduces you to key concepts of Strategic Clarity about dynamic organizations, learning dynamics, human-potential centered strategy, strategic systems thinking, and strategy mapping. This course provides results for you personally, by increasing your understanding of strategy as a dynamic view of organizational system, and potential of human-centered strategy. For your organization, it increases your understanding of how Strategic Clarity might influence your organization's performance.

Time: 1 Day

Lead Facilitator: James Ritchie-Dunham

Facilitation: 1 Facilitator

Launching and Managing High Performance Workgroups

Workgroups are the primary building block of an effective organization. When the right group is brought together, the results far surpass what the team members could have accomplished individually. This workshop builds awareness and skill in the areas of team dynamics, group problem solving, and group decision making. Structural and behavioral dimensions of building and leading effective workgroups are fully explored. You will develop leadership skills applicable to many areas, but especially suited to launching and improving intact workgroups, quality circles, interdepartmental task groups, and other group situations where combined efforts are needed to reach optimal performance levels. This workshop presents practical techniques that will help learners build and lead teams that achieve greater results for their organization.

Time: 3 Days

Lead Facilitator: Charlie Tweedly

Facilitation: 2 Facilitators

Leading Change

Building capacity to change is no longer an option; it is a strategic imperative and has become a key source of sustainable competitive advantage. The fact is that over 70% of organizational change efforts fail to meet their stated objectives. This program will explore best practices in change facilitation that can assure the delivery of performance-enhancing change, while speeding the rate of implementation. In this workshop participants learn how to establish a framework and a roadmap for change, as well as a reliable process for engaging all levels of the organization in enacting the change. Most importantly, the workshop will provide you tools to help you foster meaningful discussions among all the impacted groups/organizations keeping everyone focused and working together toward a common goal. Participants leave with a plan to execute the most urgent change confronting them.

Time: 3 Days

Lead Facilitator: Charlie Tweedly

Facilitation: 2 Facilitators

Making Sense Out of an Uncertain Future: Studies of the Future

When discussing scenarios, decision makers need to move into the fringe of today's world. If the pace of change is so much faster than it was even ten years ago, then the fringe issues are actually on the near horizon. For example, the existence of the Internet as a business tool has only come into play in the last four or five years. It is not that the infrastructure was not present; there just were not enough people with the personal computer culture to make a difference commercially. To help leaders move out into this terrain of thinking, the emerging field of Studies of the Future, adds tremendous support. The focus of this thinking is not to look at the best, worst, and most likely case for certain known financial and market indicators, but rather a deep investigation across a very broad set of outlying issues. This research is called environmental scanning and requires a set of skills that often conflict with traditional, financial analysis.

In order to be helpful, the futurist, as they are often called, reaches out beyond the scope of the industry to the fringe of society where trends begin. Petroleum, polymers and pop music all started on the fringe and worked their way into mainstream society and culture, dramatically changing the way we live. Environmental scanning is the active pursuit of knowledge about the fringe, in an effort to establish a hypothesis about which trends will arrive and how we can recognize their approach. Not only is it insightful to foresee which trends will impact tomorrow's world but also essential to identify road signs that will indicate which trend is on the way! Both pieces are extremely important.

The difference in this approach from the traditional scenario planning discussed above is clear. Internal strengths and weaknesses of the organization are now tested against threats and opportunities from outside as well as inside the current industry condition. In addition, the focus moves from issues of certainty to issues of uncertainty. Trends are no longer based in financial terms but rather societal, cultural, technological, political, and economic terms concurrently. This course with a degreed futurist provides an overview

and initial experience with leading frameworks and tools in the world of studies of the future.

Time: 3 Days

Lead Facilitator: Jay Forrest

Facilitation: 1 Facilitator

Managing from Clarity: Mapping Your Own Organization

Strategy has always been about the art of "seeing" the optimal paths through a field of complexity. This requires the ability to see and understand the whole. However, we have been systematically taught and managed to see/understand pieces.

Managing from Clarity offers a clear transferable process for constructing, holding, interpreting and navigating the whole.

We ask you to bring your most important issue to the course as we will apply the Managing from Clarity principles and tools with you on that issue. By the end of the course, we offer you the ability to: (1) construct the linkages among the critical strategic resources of your organization; (2) hold all of the necessary elements of your strategic issue in one place; (3) interpret the impact of possible expected outcomes as well as unexpected ones on your organization; and (4) build the foundation to navigate the whole where you want to go.

Time: 2 Days

Lead Facilitator: Hal Rabbino

Facilitation: 2 Facilitators

Meeting the Global Business Challenge: Achieving Company Objectives in the Face of Diverse Stakeholder Expectations

Business operating in an international environment brings great complexities in terms of thinking globally and acting locally. A business operating in a specific foreign location must be sensitive to local values and cultures and is increasingly expected to be responsive to environmental, social and economic impacts. Businesses are developing innovative strategies to work with communities, governments and interest groups like environmentalists to both create business opportunities and address these diverse parties' concerns. This can mean creating local collaborations with these parties around issues of common concern, and participating in new organizational forums such as global action networks that include business, government and non-governmental organizations.

Time: 1-2 Days

Lead Facilitator: Steve Waddell

Facilitation: 1 Facilitator

Real Options

This course will present approaches for modeling decisions and uncertainties that draw on the ideas of real options and decision analysis. In real options the focus is on options, decisions that are made after some uncertainties have been resolved. For example, owning a power plant gives a utility the opportunity, but not the obligation, to produce electricity at some later date. Options (or “downstream decisions”) have always been a part of decision analysis. Decision tree models of the classic wildcatter problem always include an alternative that allows you to gather information about a prospective oil field before deciding whether to “exercise your option” and drill the prospect.

While there are similarities between the notions of real options and decision analysis, there are also some important differences. Because of computational complexities, real options analyses usually focus on the evolution of a few (one or two) stochastic factors that determine the value of the investment over time. These models tend to emphasize “dynamic complexity” at the expense of “detail complexity”. In contrast, corporate decision analysis models typically include much more detail in the cash flow models and many uncertainties, but relatively little detail regarding downstream decisions. In some applications, the insights may follow from a careful consideration of the dynamics, and in others the details may be more important. Therefore, practitioners would benefit from being able to pick and choose among the available tools and concepts from both streams of literature.

Time: 4 Days

Lead Facilitator: Jim Dyer

Facilitation: 1 Facilitator

Risky Decision Making

This course focuses on the application of decision theory to the quantitative analysis of risky decision problems. Risky decision problems generally involve large amounts of resources that must be committed to alternatives in competitive and uncertain environments. Examples would include corporate acquisition decisions, new product decisions, major capital investment decisions, and choices among alternate technologies. Many of these problems can be conceptualized and structured using the ideas of decision theory. A series of case studies will be used to illustrate the application of these methodologies. A key element of this course will be the use of microcomputers as a tool for performing the case analyses. This will include standard programs (e.g., Excel) and state-of-the-art software (DPL and LOGICAL DECISIONS).

This is not simply a “techniques” course. Class discussions will include considerations of why quantitative techniques are useful, and also consider how they can be made more useful to real decision-makers. This course is designed for managers with a general interest in the use of quantitative methods for aiding decision-making.

Time: 4 Days

Lead Facilitator: Jim Dyer

Facilitation: 1 Facilitator

Service Supply Chains

Service firms employ over 75 percent of the workforce. Yet managing service operations is often very different from managing manufacturing or distribution operations.

Relatively little operations literature, particularly that involving mathematical models, focuses on services outside of the traditional area of queuing management. However, there is a plethora of opinion in the area as well as a great number of empirical studies. This course emphasizes mathematical service models, built on real cases from the instructor's research and consulting experience.

Time: 3-4 Days

Lead Facilitator: Edward Anderson

Facilitation: 1 Facilitator

Synergy: A Gaming Simulation for Creating Exceptional Managers

The environment in which executives are making decisions is evermore complex. Organization must develop their ability to react and adapt in these interconnected, fast-paced environments. To do this, these organizations need to create structures that can detect and understand these changes as well as to re-create themselves internally when necessary. In this course, executive teams learn to do this in real-time group dynamics while interfacing with a game that takes them on a path towards increasing complexity and competitiveness. The game dynamics provokes crisis situations that require the team to rethink how it organizes itself and how it understands the causes of its difficulties. After the crisis, the gaming environment creates an increasingly challenging search for solutions. The result is the construction, on the part of the groups, of a new type of response, based on a new organizational learning model. Specifically, in this course, the team members: (1) acquire a systemic vision of reality, (2) manage change, (3) learn to communicate, and (4) work as a team.

Time: 3 Days

Lead Facilitator: Ricardo Zamora

Facilitation: 2 Facilitators

Tools for Applying Organizational Learning

The course starts by summarizing the prevailing theoretical framework for thinking about organizational strategy today. This framework shows that an organization's strategy should recognize that organizations are dynamic, resource-based, and people-centered. The course addresses these issues of learning in dynamically complex systems, in three modules, focusing on how organizations learn, tools for capturing and sharing that learning in strategic resource maps, and tools for analyzing those maps. In this transformational experience, the participants work alone and on teams to discover the implications of a truly people-centered organization. They then use the tools to capture and share that understanding. The purpose is to familiarize the course members with strategy theory and practice developed since many of the common strategy tools used today were developed (in the 1980s).

Time: 4 Days

Lead Facilitator: James Ritchie-Dunham

Facilitation: 1 Facilitator

Course Instructors

See the Institute for Strategic Clarity website for CVs on the instructors at
<http://www.instituteforstrategicclarity.org/theinstitute.htm#Members>