

27 DEC 1984

DDA 84-3620/1

MEMORANDUM FOR: Executive Director

FROM: Harry E. Fitzwater
Deputy Director for Administration

SUBJECT: Center for Creative Leadership -
Strategic Skills for Executives Program

The Office of Training and Education (OTE) will have a participant, preferably one of our management instructors, in one of the next offerings of the Strategic Skills for Executives Program. We will consider if one of the OTE management instructors cannot attend. OTE is evaluating the Program for Executive Development as well as its potential for other audiences.

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Harry E. Fitzwater

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| DATE OF DOC | DATE REC'D | DATE OUT | SUSPENSE DATE | CROSS REFERENCE OR POINT OF FILING | |
| TO FROM SUBJ. EX DIR DDA Center for Creative Leadership Strategic Skills for Executives Program | | | | ROUTING | DATE SENT |
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FROM: Harry E. Fitzwater
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Strategic Skills for Executives Program

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14 DEC
1984

MEMORANDUM FOR: Deputy Director of Training and Education
FROM:
Chief, Executive Development Staff
SUBJECT: CCL Course - "Strategic Skills for Executives"

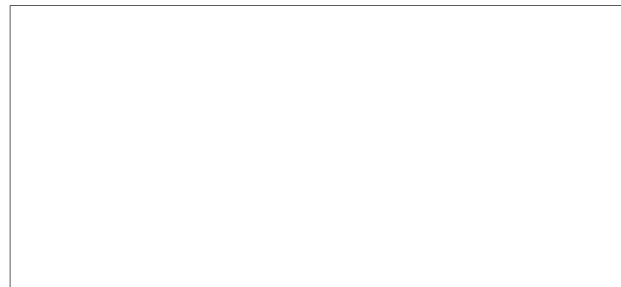
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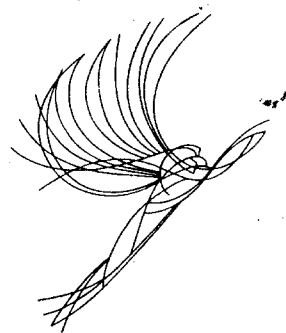
1. This looks like a good program. Both CCL and New York U. have a good reputation. I would like to evaluate it personally, but think other OTE officers will benefit more from the training. Could we send someone like who make greater use of these strategic planning skills in their work.

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2. As an aside: we had sessions on strategic planning in Core Course I. Even with the EXDIR's support, we will be swimming upstream if we offer it as an elective. Our SIS officers tend to resist strategic planning, although most could benefit from the training.

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CENTER FOR CREATIVE LEADERSHIP

5000 Laurinda Drive. Post Office Box P-1. Greensboro, North Carolina 27402. Telephone 919 288-7210.

November 20, 1984

To: CCL Alumni

From: Patricia A. Wegner-Lake
Marketing Manager

A vital part of being an executive is creating strategy. Executives create strategy by assessing their organization's present circumstances and by repositioning their organizations to take advantage of emerging opportunities. Strategic planning requires a mix of conceptual skill and the ability to work productively with others to plan for the organization's future.

With this in mind the Center, in collaboration with the New York University Schools of Business, has developed an executive program that focuses on:

- developing strategic management skills
- practicing and refining these strategic skills through participation in the Financial Services Industry (FSI) simulation

STRATEGIC SKILLS FOR EXECUTIVES is scheduled for March 11-14, 1985, here in Greensboro, North Carolina.

The enclosed description will tell you more about this new program and includes a registration form. We thank you for your past participation and hope that you and other members of your strategic management team can join us.

If you have any additional questions, please call.

CENTER FOR CREATIVE LEADERSHIP

The CENTER FOR CREATIVE LEADERSHIP
announces a major new program . . .

STRATEGIC SKILLS FOR EXECUTIVES
A Four-Day Program on Strategic Planning and Management
March 11-14, 1985

This program of learning by doing is designed to help senior managers further develop their strategic management skills through:

- A grounding in the fundamental skills and concepts of strategic planning
- A rare opportunity to practice and refine these skills through participation in an elaborate, realistic simulation of high-level strategic planning in two financial services companies

The Key Benefits of Attending

- Develop a strategic orientation toward your company and its place in the industry
- Learn to be more responsive to changes in the environment
- Learn to manage better the tension between daily operation and long-term strategies for growth and diversification
- Gain insight into yourself as a strategy-maker and manager

Who Should Attend

Upper-level managers who, at a minimum, are in charge of strategic business units or report directly to someone in such a position.

PROGRAM TOPICS

An Organization's Environment. How to conduct a competitive analysis of an industry . . . taking into account the demands and needs of the consumer . . . understanding the nature of the competition . . . assessing social, legal, economic, and demographic conditions and trends.

An Organization's Situation. How to analyze an organization's strengths and weaknesses . . . seeing opportunities and dangers . . . determining strategic goals . . . identifying alternative strategies.

A Day of Strategic Planning. Participate in a six-hour simulation that requires strategic thought and planning . . . be part of a management team of up to 25 executives roles (from president to key senior staff) in one of two financial services companies--a securities firm and a commercial bank . . . focus on diverse strategic issues such as credit card losses, expanding services, selling insurance products, retaining key personnel, growth in branch banking, and the loss of brokers to competitors, among many, many others. (Experience in the financial services industry is not required.)

Debriefing the Simulation. An analysis of the goals set for each simulated company and the fit between your managerial actions and those goals . . . an examination of power, climate, and networks in relation to the goals-action fit . . . feedback from other executives on the effectiveness of your strategic and managerial actions based on performance during the simulation.

Application of Learning. Rework the strategies and rethink the managerial actions you took during the simulation in light of lessons learned in the debriefings . . . consider key strategic questions in back-home organizations, applying learning from the program and taking self-insight into account . . . formulate an action plan for using strategic skills on the job.

ABOUT THE FINANCIAL SERVICES INDUSTRY (FSI) SIMULATION

The six-hour simulation (designed by New York University Business Schools faculty members and staff in collaboration with the Center) recreates a day in the life of senior management in two business units--a bank (Metrobank) and a securities firm (Investcorp). Metrobank is part of the fictitious Metrobank Holding Company, which includes a bank with \$1.5 billion in assets and a medium-sized finance company. Investcorp, part of Investcorp Holding Company, includes a large securities firm with \$108 million dollars in capital and a regional insurance company.

The simulation involves 25 different roles, from the presidents of Metrobank and Investcorp to group executive vice presidents and staff in operations, marketing, personnel, and data processing. All participants receive extensive information on "past" business decisions and correspondence on current issues and problems. The simulation presents the participants with the business environment of the eighties--full of uncertainty, danger, and opportunity. Only by identifying the important issues, collecting and sharing information, and formulating appropriate strategies through interaction with others can participants manage effectively in the simulation.

To prepare for the simulation, participants will receive annual reports, background information on the financial services industry, and an extensive overview assignment. Before the simulation begins, the participants will meet with the program staff to formulate a learning contract. Then during the simulation the program staff will observe the managers at work and will subsequently meet with them individually and in small groups to discuss their actions and performance during the simulation.

PROGRAM INFORMATION

Workshop Leaders

ROBERT E. KAPLAN is Director of the Looking Glass Program at the Center. He has conducted research on managerial work, group effectiveness, and organizational diagnosis and change, and has published a number of papers in these areas. A certified group facilitator and organizational consultant and a member of the National Training Laboratories Institute, Bob holds a Ph.D. in organizational behavior from Yale University.

RUSSELL S. MOXLEY is Assistant Director of the Looking Glass Program and a Senior Trainer at the Center. His background is in management training and management and organization development. Before coming to the Center, Russ was the Manager of Training and Development at ARCO Alaska, Inc. He has a Bachelor's and Master's degree from Southern Methodist University in Dallas.

ANNE M. FABER is Director of the Workshop in Organizational Action and Program Associate with the Leadership Development and Creativity Development Programs at the Center. Her work has focused on the design and delivery of training programs in the areas of leadership effectiveness and innovative problem solving. She has conducted programs for a variety of audiences in the U.S., the United Kingdom, and Mexico. Before becoming involved with leadership and creativity training, Anne was a bank examiner with the Federal Deposit Insurance Corporation and a regional auditor with a bank holding company. She received both a B.A. and M.A. in economics.

STEPHEN A. STUMPF is Associate Professor of Management at New York University, where he received his Ph.D. He is the author of Managing Careers (1982) and Choosing a Career in Business (1984), as well as many articles on decision making, problem solving, and career development.

THOMAS P. MULLEN is an instructor in management at New York University, where he received his Ph.D. He recently co-authored Technical Analysis of the Stock Market (1984) and has published in the areas of management training, simulation and cross-cultural communication.

KAREN S. HARTMAN is Assistant Professor of Management at Baruch College. She received her Ph.D. from New York University. Her published research includes work in career decision making, organizational commitment and withdrawal processes, and computer-based learning.

Date and Location

This program will be held March 11-14, 1985, at the Center for Creative Leadership, Greensboro, North Carolina.

Accommodations

Rooms have been reserved at Guest Quarters in Greensboro. More information will be provided upon registration.

Program Hours

The program will begin at 8:30 a.m. on Monday and end at 3:00 p.m. on Thursday.

Program Fee

Tuition is \$1,100.00 and includes all program materials and meals.

Registration

To reserve your place, complete and return the enclosed registration form or call Pat Wegner-Lake at (919) 288-7210 for further information.

REGISTRATION FORM

PROGRAM TITLE _____

DATE OF PROGRAM _____

FULL NAME _____

I PREFER TO BE CALLED _____

TITLE _____

PHONE (OFFICE AND HOME) _____

ORGANIZATION _____

MAILING ADDRESS _____

CITY/STATE/ZIP _____

TUITION

- My full tuition in the amount of \$_____ is enclosed (make checks payable to the Center for Creative Leadership).
- My company's purchase order is enclosed. Please send an invoice.

ACCOMMODATIONS

- Please make lodging arrangements for me (details on location and cost of accommodations will be sent with registration confirmation) for the nights of _____.

CANCELLATION POLICY

Registrations cancelled or transferred less than three weeks prior to the starting date of the program are subject to a charge of 30 percent of the registration fee. There is no charge for substitutions.

I have read your Cancellation Policy and accept its terms.

Signature

Date

Please return this form to Dawn C. Dunman, Registrar, Center for Creative Leadership, P.O. Box P-1, Greensboro, North Carolina 27402-1660. Your enrollment will be confirmed within ten days.

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DDA 84-3620

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 FOR EXECUTIVES

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