

# Excelerate

*DEVELOPMENT FOR CURRENT & FUTURE  
LEADERS IN FINANCIAL SERVICES*



INSTITUTE OF  
STRATEGIC  
MANAGEMENT

[ism.edu.au/excelerate](http://ism.edu.au/excelerate) | RTO ID 91485

2020

# Excelerate

This innovative program has been designed to deliver targeted learning outcomes in the key aspects of Leadership, Change Management, Innovation and Digital Marketing, with a focus on the financial services industry.

- Workshops held over 18 months
- Quality peer networking opportunities
- Guest presentations by experienced industry executives
- Innovation-driven field trips
- Held on the idyllic Jones Bay Wharf, Sydney



The Excelerate Program will be delivered with BSB61015 Advanced Diploma of Leadership and Management; a highly sought after qualification.

**Could this be the start of your MBA journey?**



With your successful completion of your qualification and 4+ years of industry experience, apply for Advanced Standing of 2 units towards a Graduate Certificate in Management or Business at the University of New England (UNE).

Now that you have both the Advanced Diploma and the Graduate Certificate you can now articulate through to the MBA at UNE with only 8 additional units to complete!



# Accelerate focuses on:

- Leadership in a digital age
- Leading through change
- Working with teams
- Working strategically
- Presentation skills
- Business operations
- Developing relationships and improving your network
- Leader as coach

## Who should attend?


- Current or future leaders looking to expand their skills in a broader range of topics
- Those that currently hold a Cert IV or Diploma qualification and are looking to gain a higher qualification.
- Leaders new to financial services industry looking to fast track their knowledge of the sector.
- Practice managers, BDMs, business owners

## MAJOR PROJECT:

**Design & pitch a business case to deliver a solution for an opportunity within your organisation.**

Your project will provide a compelling justification for implementation of an improvement focussed on strategic planning, regulatory matters, efficiency, growth or customer experience.

Accelerate graduates will present their projects to the executives within their organisation & executives of their alumni at a presentation day at the conclusion of the program. Adopted projects have resulted in improved performance within the organisation and dramatic revenue increases.



There will be additional activities, resources and readings that will need to be completed online in between workshops. Your assessments for BSB61015 Advanced Diploma of Leadership and Management will also be found online. Our Trainers are available to assist your online learning when you need assistance.

# Why now? Why Excelerate?

“

**What a difference this program has made to my business. I now understand the direction I want my business to go in and I understand a lot more about myself as an individual. I would highly recommend this course to all mortgage brokers- especially those who run their own business.**

*Nicole Cannon*  
Pink Finance

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“

**I would highly recommend this course to anyone looking to enhance their critical thinking skills and professional growth.**

*Leah Nygryn*  
Manager Credit Services, Australian Mutual Bank

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# Accelerate Investment

We have designed the Accelerate program to deliver innovative and industry leading learning for our future leaders. ISM has secured Smart & Skilled funding for NSW participants at the pricing of **\$2910 per participant**. Please discuss this option with us as conditions apply.

For those not in NSW the investment for the program is **\$6,250 per participant**.  
(Pricing subject to change)

## This investment will include:

- Workshops, including catering
- Additional sessions and field trips
- Printed learning material and workbooks
- Access to a dedicated online learning portal
- Advanced Diploma qualification, when all relevant assessments are successfully completed.



# Next steps

01

To enrol, visit [ism.edu.au/excelerate](http://ism.edu.au/excelerate) and follow the prompts

02

An invoice will be sent for the program payment.

03

Once payment is received we will grant access to online learning portal so you can start the required pre-reading

04

Book the session dates into your diary

## WHAT IS REQUIRED BEFORE THE FIRST SESSION

- View the Participants Profile Resources (via the online portal).
- Complete all pre-reading required (via the online portal)

## NEED MORE INFO? CONTACT US AT:

**Haley Bellamy**  
Institute of Strategic Management  
T: 0408 250 105  
E: [haleyb@ism.edu.au](mailto:haleyb@ism.edu.au)

# WORKSHOP STRUCTURE



INSTITUTE OF STRATEGIC MANAGEMENT

## Session 1

**2 Days**  
including  
program  
introduction

- Facilitating design thinking
- Building a collaborative culture
- Understanding performance balanced
- scorecard methodology
- Advanced communication skills for
- handling complex environments
- Effective delegation

### Providing Leadership

Tuesday 19th and  
Wednesday 20th May  
2020, 9-5pm

## Session 2

**2 Hours**  
Drinks/snacks  
provided.

Invitation to industry CEO's to discuss what is needed from our industries future leaders.

### CEO Discussion

Tuesday 19th May  
2020, 4.30pm-6pm

## Session 3

**2 Days**

- Overview of strategy relating to the customer owned banking and mutual industry
- Impact of regulation
- Managing risk
- Managing funds
- Channel design
- Introduction to six sigma and process improvement
- Understanding prudential guidelines

### Strategic Planning

Tuesday 4th and  
Wednesday 5th  
August 2020, 9-5pm

## Session 4

**2 Days**

- Digital Innovation
- Understanding the consumer mind
- Blue Ocean Thinking
- Design thinking methodology
- Creating an innovative culture
- Impact of continuous improvement

### Identify & Build Innovation

Tuesday 10th and  
Wednesday 11th  
November 2020, 9-5pm

# WORKSHOP STRUCTURE



INSTITUTE OF STRATEGIC MANAGEMENT

## Session 5

4 hours

How to design and deliver quality presentations to key stakeholders groups (offsite)

### Presentation Development

TBC

## Session 6

2 Days

- Life cycle, life stage and psychographic segmentation
- Social media and its role in strategic communication
- Sales force management
- Member Experience
- Business development strategy

### Planning for marketing opportunities

Tuesday 2nd  
February 2021 and  
Wednesday 3rd  
February , 9am-5pm

## Session 7

4 Hours

How to plan and implement digital marketing (offsite)

### Digital Marketing

Thursday 4th  
February 2021 9am –  
1pm

## Session 8

1 Day

- Understanding change dynamics including resistance
- Strategies for change
- Managing the change process

### Leading Change

Tuesday 4th May  
2021, 9-5pm



# WORKSHOP STRUCTURE



INSTITUTE OF STRATEGIC MANAGEMENT

## Session 9

1 Day

- Overview of the treasury function
- Understanding business finance including cost of funds
- Modeling business unit operating leverage
- Managing contribution margin Portfolio management
- Impact on understanding the change in value due to retention
- Budgeting using stretch budgets
- Engagement strategies for goal setting
- Managing positive and negative variance

### Managing Finance & Risk

Wednesday 5th May  
2021, 9-5pm

## Session 10

Field Trip  
5 Hours

Innovation leaders within and outside of industry.  
Retail outlet store tour and Store Manager discussions.  
For example Telstra Innovation centre

### Storefront Innovation

Thursday 6th May  
2021, 9am – 1pm

- Develop and understanding talent plans
- Managing staff engagement
- Nurturing performance
- Managing underperformance
- Using communication and feedback to create a high performance culture

### Planning for People Capability ONLINE LEARNING