



INSTITUTE OF STRATEGIC MANAGEMENT

Leadership and Strategy

# EXCELERATE 2019

Development for current  
and future leaders



# 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 Customer Owned Banking business model.



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

#### IMPORTANT TO NOTE:

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 more than happy to assist your online learning when you need assistance.



Upon successful completion of Excelerate

- 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

## Excelerate focuses on:

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



# WORKSHOP STRUCTURE

## SESSION

01

### PROVIDING LEADERSHIP



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

**2 Days**

including  
program  
introduction

Tuesday 24th  
and  
Wednesday  
25th September 2019  
9am – 5pm

## SESSION

02

### CEO DISCUSSION



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

**2 Hours**

Drinks  
/snacks  
provided.

Tuesday 24th  
September  
4.30pm – 6.30  
pm.

## SESSION

03

### STRATEGIC PLANNING



- 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

**2 Days**

Tuesday 19th  
Wednesday 20th  
November 2019  
9am – 5pm



# WORKSHOP STRUCTURE

## SESSION

04

### IDENTIFY AND BUILD BUSINESS INNOVATION



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

2 Days

Tuesday 4th  
and  
Wednesday 5th  
February 2020

9am – 5pm

## SESSION

05

### PRESENTATION DEVELOPMENT



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

4 Hours

Thursday 6th  
February 2020  
9am – 1pm

## SESSION

06

### PLANNING FOR MARKETING OPPORTUNITIES



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

2 Days

Tuesday 5th  
and  
Wednesday 6th  
May 2020

9am – 5pm

## SESSION

07

### DIGITAL MARKETING



- How to plan and implement digital marketing (offsite)

4 Hours

Thursday 7th  
May

9am – 1pm





# WORKSHOP STRUCTURE

SESSION

08

## LEADING CHANGE



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

1 Day

Tuesday 28th  
July 2020

9am – 5pm

SESSION

09

## MANAGING FINANCE AND RISK



- 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

1 Day

Wednesday  
29th July 2020

9am – 5pm

SESSION

10

## STOREFRONT INNOVATION



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

5 Hours

Thursday 30th  
July 2020  
(Sydney) 9am  
– 2pm

### ONLINE LEARNING

#### PLANNING FOR PEOPLE CAPABILITY

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



# ADDITIONAL SESSIONS

We have designed the Excelerate program to include specifically targeted innovative topics that will deliver insights into the future of the customer owned banking industry. The additional sessions will be scheduled around workshops to assist in reducing the travel time for regional and interstate participants.

## SESSION 2: CEO DISCUSSION

Opportunity to meet with industry CEO's regarding the future of customer owned banking, managing change, and their own expectations of industry leaders.

## SESSION 5: DELIVERING QUALITY PRESENTATIONS

The process of how to design and deliver quality presentations to key stakeholders groups.

*Delivered by ISM*

## SESSION 7: HOW TO PLAN AND IMPLEMENT DIGITAL MARKETING

This session will be delivered in a half-day session delivered by a digital marketing specialist.

Covering:

- Search Engine Optimisation (SEO)
- Digital metrics including website analytics and social media monitoring
- Digital marketing planning
- Consumer behaviour
- Marketing communications
- Digital marketing trends

## SESSION 10: STOREFRONT INNOVATION

Half-day field trip, conducted in Sydney. We will meet with leaders in innovation within and outside of industry. Included will be a retail outlet tour and store manager or representative discussions. For example Stone and Chalk.



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# INVESTMENT

We have designed the Excelerate program to deliver innovative and industry leading learning for our future leaders.

The investment for the program is \$6,250 per participant.  
(Pricing subject to change)

## THIS INVESTMENT WILL INCLUDE:

- Participation in the workshops, including catering.
- Participation in the 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.
- One year membership with Instil- Engaging Bright Minds

Additional costs may include transport and accommodation and field trip transfers where relevant.

*Please ask us about opportunities for conditional funding assistance on this program.*



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# NEXT STEPS

01

To enrol, visit [www.ism.edu.au/excelerate](http://www.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 to commence the required pre reading.

04

Book the session dates into your diary

## WHAT IS REQUIRED BEFORE THE FIRST SESSION

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

## NEED MORE INFORMATION? CONTACT US AT:

**Madelin Lee**  
**Institute of Strategic Management**  
T: 1300 200 705  
E: [madelinl@ism.edu.au](mailto:madelinl@ism.edu.au)





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# FEEDBACK

*We have had some fantastic feedback from our previous Excelerate intakes, held at our Jones Bay Wharf facility.*

As a novice manager in the Mutual industry, I found the Advance Diploma of Leadership and Management to have been extremely timely and beneficial to my professional development.

It provided me with not only a qualification, but acted as a mentor to me as I navigated my new role and other facets of the business.

I was able to directly apply skills learned in each session immediately in the workplace, which not only assisted me personally but also my team and other departments.

Being able to collaborate with industry peers and learn face to face was one of the key drawcards for me, and I enjoyed the challenge of the coursework.

Each workshop presenter provided relevant content and insight into their own area of expertise, which was both engaging and inspiring.

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

Leah Nygryn

Lending Manager, Endeavour Mutual Bank

**Ideal venue and location. This has been a very "hands-on", interesting and effective course for my workplace and professional development. Course material and the workshops have introduced new ideas and different ways of thinking. Colin was excellent in presentation- charismatic and engaging. Clearly knew his stuff. Enjoyed all the different activities. ISM and Gerard in particular are extremely respectful and understanding of all our backgrounds and needs. He truly seems to care for all the students, understand us and our needs and assist with developing us. 5 Stars.**

Serena Sullivan

South West Slopes Credit Union



RTO ID 91485