



# CERTIFIED STRATEGY & BUSINESS PLANNING PROFESSIONAL

Develop strategies to drive business  
performance in a turbulent environment

LONDON, UK

2026 EDITIONS:  
> 05 - 07 AUGUST



The KPI Institute is an Accredited Provider of the CPD Standards Office, a Continuing Professional Development global assessor.

## Key business benefits - Participants in this course will:

- › Understand the logic of strategy planning at every level of the organization;
- › Become familiar with an easy-to-use toolkit for every step of the strategy planning process;
- › Be ready to transfer the knowledge accumulated into their organization.

## Over the last years, the team at The KPI Institute:

- › Documented 8,000+ KPIs from 16 functional areas and 25 industries;
- › Reviewed 1,000+ performance reports from 125 countries;
- › Referenced 30,000+ resources as part of the documentation process.



# Course overview



The business world is rapidly changing – creating short-span windows of opportunities and unexpected threats. To adapt and adjust to this dynamic environment, organizations seek planning tools that would allow them to build strategies that are both flexible and shock-absorbent. This course will help improve long-term organizational performance through the use of strategic planning tools. Participants will explore the framework that provides the foundation of a successful business strategy, focusing on the main components of a strategy and practicing the development of an efficient strategic plan. The course will also provide insights on the fundamental principles and methods for communicating strategy across the organization.

## Participants' profile

### › Business owners and top management

Business owners and top management professionals will acquire the knowledge and competences needed to design a strategy at the corporate level, thus increasing the performance of their organization in terms of relevant financial indicators, operational indicators, customer satisfaction indicators and employee satisfaction indicators.

### › Middle management professionals

Professionals from different fields, such as finance, human resources, production, logistics, marketing & sales and others, will acquire the knowledge and competences to design and implement a strategy for their department, that supports and is aligned to the organizational strategy.

### › Consultants and academia

These participants get a chance to validate and certify worldwide their knowledge and competences in assisting organizations with their strategy and business planning processes at all levels. By attending the course, they also join a network of professionals in the field and get into direct contact with companies potentially interested in their services.

## + Benefits

- › Obtain structured knowledge, that can be transferred into all areas of your professional life;
- › Access an innovative learning experience based on a 3 stage educational process;
- › Obtain a premium recognition as a Certified Strategy and Business Planning Professional by completing a unique international learning program.
- › Obtain 40 CPD credits to include in your CPD records for your professional body, institute, regulator or employer

## 🎯 Learning objectives

- › Comprehend fundamentals of the strategic planning process;
- › Learn to coordinate teams in order to set up to design strategies;
- › Set clear strategic objectives, evaluate strategies and suggest adjustments;
- › Understand key areas of a business model.

# Agenda



## Day 1 - 8h

### Key concepts

- › Strategy planning defined
- › Assumptions for strategy planning
- › The process of strategy planning – an overview

### Corporate Identity

- › Impact
- › Mission
- › Corporate values
- › Capabilities

### Choice of a competitive strategy

- › Low cost, low price
- › Differentiation
- › Customer relationship
- › Network effect

### Strategic Internal Environmental Scanning

- › Assessing existing processes
- › Assessing existing resources
- › Assessing existing procedures
- › Competitive benchmarking

## Day 2 - 8h

### Strategic External Environmental Scanning

- › PESTEL analysis
- › Porter's 5 forces
- › SWOT Analysis
- › Scenario Planning

### Case Study

- › Definition of corporate identity
- › Internal environment scanning
- › External environment scanning
- › SWOT analysis
- › Scenario planning

### Vision & Choice of Growth Strategy

- › Defining the vision in the context of the chosen planning scenario
- › Intensive growth
- › Internationalization strategies
- › Integrative growth
- › Diversification strategies

## Day 3 - 8h

### SMART Objectives at Corporate Level

- › Long-term vs. strategic objectives
- › SMART strategic objectives
- › The strategy tree

### Case Study

- › Vision
- › Choice of a growth strategy
- › The strategy tree

### Planning at Departmental Level

- › An overview of the planning process at department level
- › The algorithm of cascading the corporate strategy
- › Planning "business as usual" vs. identifying new projects at department level

### Review and Q&A

- › Course review
- › Q&A

### Certification Exam

# Learning experience

## ○ Pre-course

This part of the learning experience is meant to ensure a smooth transition to the face to face training. Participants are required to take the following steps:

- › Needs assessment – complete a questionnaire to determine a tailored and relevant learning experience;
- › Pre-course evaluation quiz – take a short quiz to establish the current level of knowledge;
- › Guidance and schedule – analyze a document presenting guidelines on how to maximize your learning experience;
- › Forum introduction – share an introduction message to present yourself to the other course participants;
- › Expectations - share your expectations regarding the training course;
- › Pre-requisite reading – go through a series of documents to better understand the core-course content.

## ⦿ Core course

During the three days of intense face-to-face training, the course is designed to facilitate experiential learning and ensure a high level of interactivity. The complete learning experience consists of:

- › Reflecting on the concepts and tools presented, through constant dialogue;
- › Applying concepts in individual and group exercises;
- › Analyzing case studies and identifying solutions to real-life strategy planning dilemmas;
- › Using strategy planning tools and getting familiar with annotated templates;
- › Sharing experiences and best practices with the trainer and the other participants;
- › Constantly evaluating participants' knowledge, through short quizzes and feed-back.

## ⦿ After-course

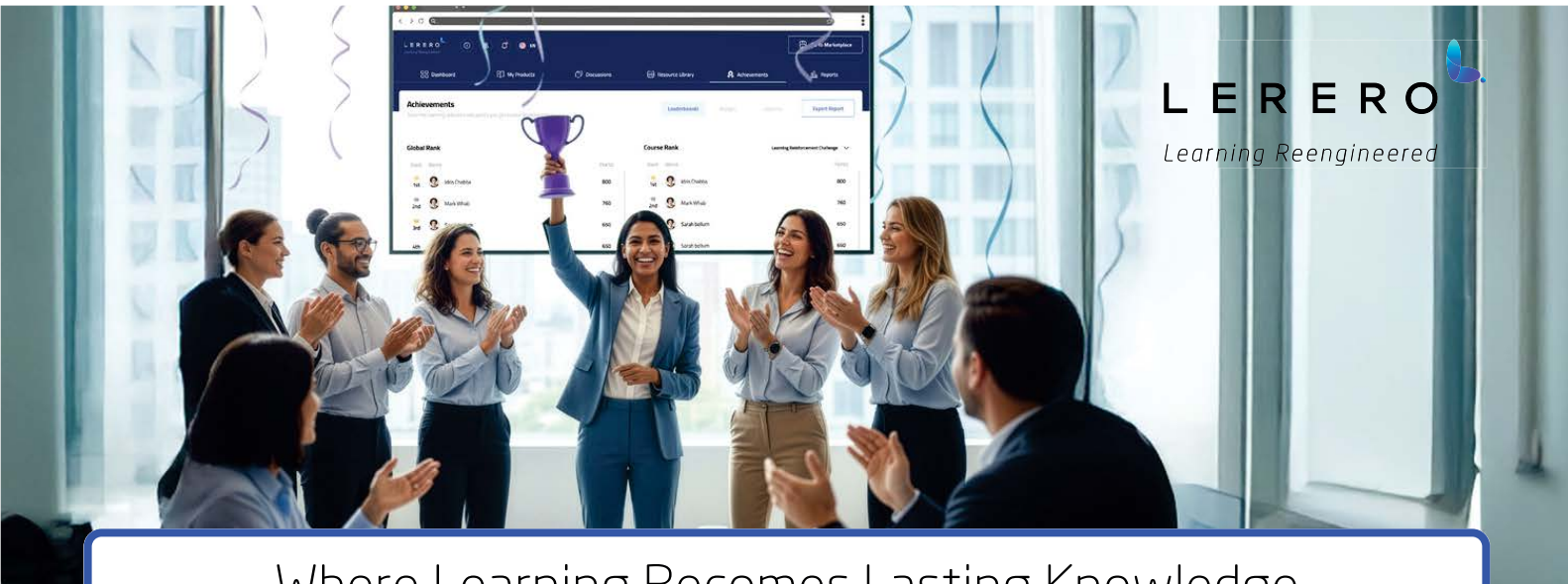
The learning process is not finalized when the core-course ends. Participants are required to take these additional steps:

- › Certification Exam - take and pass the certification exam which consists of 75 questions with multiple answers.
- › Forum discussions – initiate a discussion and contribute in a discussion opened by another participant;
- › Action plan – create and submit a plan to state the changes you intend to make in your department or organization in terms of Strategy Planning create a plan for the actions and initiatives you intend to implement after the training course;
- › In-house presentation – create and submit a short PowerPoint presentation to present your colleagues the knowledge you have accessed during the training course;
- › Additional reading – go through a series of resources (books, articles and videos), to expand your content related knowledge;
- › Learning journal: reflect upon your 3 stages learning experience and complete a journal.

## ✓ Evaluation

At the end of the core-course, each participant will receive:

- › Certificate of Completion (soft copy): after completing pre-course activities and passing the Certification Exam;
- › Certificate of Attendance (hard copy): after participating at the 3 days of on-site training course;
- › Certified Strategy and Business Planning Professional diploma (soft copy): after you have successfully completed all of the 3 stages of the learning experience.



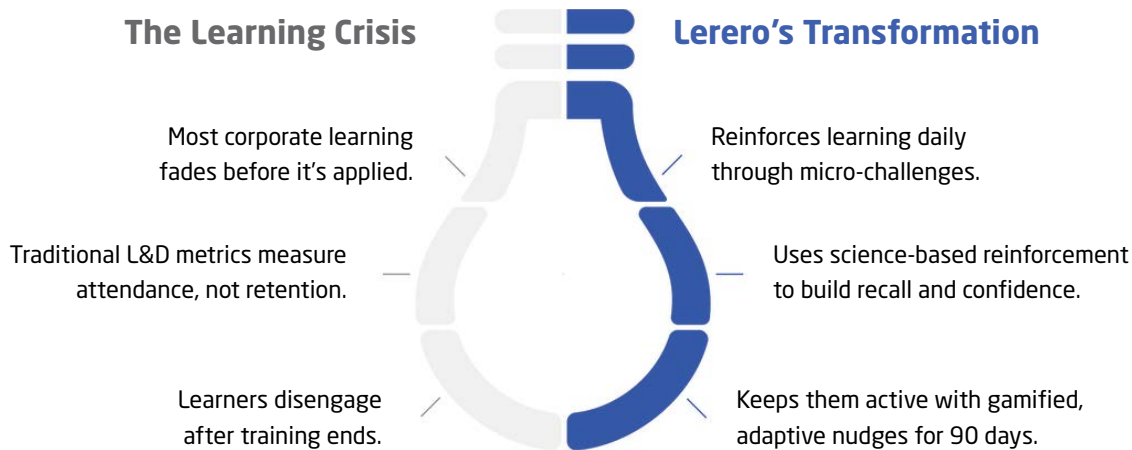
**LERERO**  
Learning Reengineered

# Where Learning Becomes Lasting Knowledge

## The Science of Reinforcement




Most employees forget up to 90% of traditional training within a week (Ebbinghaus Forgetting Curve). Lerero flips the curve, turning training into lasting mastery through gamification, repetition, and reinforcement. With 90 days of microlearning, knowledge retention can improve by up to 80%.

### The Problem → The Transformation



### The 90-Day Reinforcement Championship

Most training stops at completion. The Lerero Learning Reinforcement Championship (LLRC) keeps learning alive for 90 days through micro-challenges, nudges, and leaderboards by turning completion into competence.

-  Daily Micro-Challenges
-  Leaderboards & Streaks
-  Badges & Rewards
-  Real-Time Analytics

Ready to Reinvent Learning?

[Book a Demo](#)

Contact us:  
sales@lerero.com

Visit us:  
www.lerero.com

# Faculty

The KPI Institute retains the authority to designate facilitators for each training course based on business requirements. The TKI Faculty continually expands by incorporating subject matter experts and experienced professionals to guarantee an exceptional experience for our trainees. Consequently, the facilitator assigned to the course may undergo changes prior to the actual delivery date. For information about the appointed facilitator for each session, kindly contact your sales representative or reach out to [office@kpiinstitute.org](mailto:office@kpiinstitute.org).



## Mihai Toma

Managing Director of Consulting Services

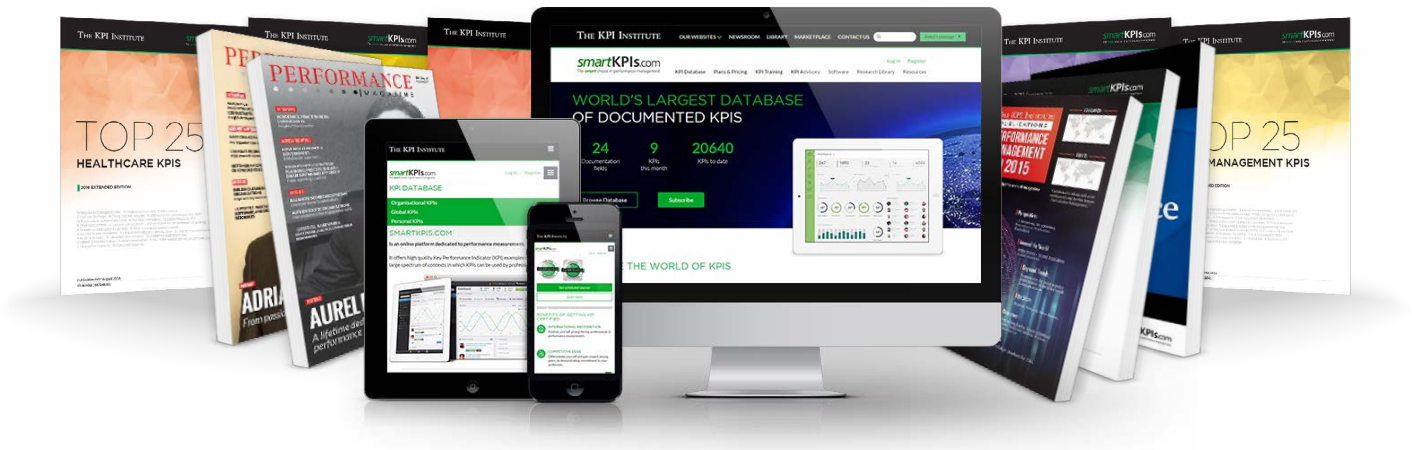
Expertise: Balanced Scorecard, Strategy Planning & Execution, Performance Measurement & Management



## Alin Sonda

Expertise: Performance Measurement & Management, Balanced Scorecard, Performance Audit

# Educational resources



## Infographics

- › Architecture of the planning process;
- › Timeline and governance of the strategy planning process;
- › The KPI infographic.

## Qualitative reports

- › Performance Management in 2012, 2013, 2014.

## Videos

- › 11 Videos dedicated to Performance Management.

## Webinars

- › Free access to all Performance Management webinars series from 2014 to 2016.

## Course materials

- › Course slides;
- › Course notes;
- › Course quiz.

## Toolkit

- › Annotated templates: SWOTM analysis, PESTEL analysis, The Porter model, SWOT analysis
- › Strategy folder: Purposeful identities (impact, mission, values, vision), Desired state of evolution, Business model overview, Portfolio of initiatives, Resource planning tools, Risk management tools, Budgeting forms.
- › Other relevant educational resources in the field of strategy and business planning.

## Premium subscription on [smartKPIs.com](http://smartKPIs.com)

- › Available for 6 months, providing access to 500 fully documented KPIs and over 20.000 KPIs enlisted and one research report from the Top 25 KPIs series.

# Fees

## Course with certification

Language	Course date	General fee	TKI members	Early bird	2 or more participants	Registration deadline
English	05 - 07 August	US \$2,900	US \$2,600	US \$2,450 by 05 July	US \$2,300	29 July



The course fees include course materials, lunch and coffee breaks. It also covers the cost of the certification process, valued at \$350, ensuring a smooth certification system.


## Accommodation


Accommodation is not covered by the attendance fee and it needs to be arranged separately by participants. We invite you to contact the event manager to enquire about special rates from the venue.

### Organize this training course in-house

If you have a group of five or more to train you can save time and money by running this training course in-house. Use the contact details provided below to request a customized offer from one of our training solution specialists.


### For more details

 The KPI Institute Marketplace

 +40 747 060 997

 office@kpiinstitute.org

 kpiinstitute.org

 LinkedIn  Facebook  Twitter

# Registration

## 3 ways to register

### Online

marketplace.kpiinstitute.org

### Direct contact

Call us and we will assist you through the registration process.

#### Mrs. Teodora Gorski

teo.gorski@kpiinstitute.com

M: +971 55 787 6427

#### Mr. Alexandru Muntean

alex.muntean@kpiinstitute.com

M: +40 747 060 997

### Registration form

Email us with your registration details

## Payment

### Credit card

Pay by credit card using the online facility.

### Bank transfer

1. Send an email containing your contact details and registration request;
2. An email confirmation containing the tax invoice and bank account details will be sent to you;
3. Proceed with the attendance fee payment by bank transfer;
4. Send through email the proof of the payment transaction completion;
5. A tax receipt together with the registration confirmation will be sent to you via email (after the attendance fee payment is confirmed).

Kindly ensure that your payments reflect the Total Amount of the invoice that will be presented to you. It is your responsibility to cover all bank fees due to Telegraphic / Wire transfer.

## Registration form

By filling your contact data, you agree to receive further information about our events. Your privacy is very important to us. We will not sell, rent or share your personal information under any circumstances.

### Participant details:

Mr.  Mrs.

.....  
First name

.....  
Last name

.....  
Job title

.....  
Email

.....  
Phone

.....  
Organization

.....  
Department

.....  
Date of training course

.....  
Training course

.....  
City

.....  
Country

### Registration cancellation procedure

Any withdrawals have to be announced at least two weeks before the beginning of the course, through fax or e-mail. In this situation, the attendance fee will be refunded, less \$400 retained for administrative expenditure. The attendance fee will not be refunded if the withdrawal from the course takes place less than 2 weeks before its start date. If you find yourself in the impossibility to attend the course after the registration process is already completed you may delegate another person to attend the course in your place without any further fees charged. If you have confirmed and made the attendance fee payment but you didn't attend the course, the course attendance fee will not be refunded. If you attend the course only partially (one day or a limited number of sessions), you will not benefit from any attendance fee reduction or refund.

### Term of Agreement

If there are no other standing agreements, this form represents a valid contract between the parties.

I agree to the above terms and conditions.

.....  
Signed

.....  
Date

.....  
Company stamp

The Customer acknowledges and agrees that all materials provided by The KPI Institute, including but not limited to the live presentations, any audio-visual presentations, and the handout materials distributed pre, during and after the training course, shall at all times remain the sole and exclusive property of The KPI Institute. They cannot be made public, and can only used for the purpose of the individual course participant's benefit. In no event shall the Customer use the live presentations, any audio-visual presentations, and/or the handout materials for any other purpose, including but not limited to the offering of any course, training or seminar that in any manner competes with the course or any portion thereof. This provision shall survive the termination or expiration of this Agreement.



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