



RTO Number 91485

INSTITUTE OF STRATEGIC MANAGEMENT

Evolve

2016

November Intake



Evolve

Institute of Strategic Management (ISM) would like to introduce our specifically designed program, purpose built, for up and coming leaders in the Financial Services industry, titled Evolve.

This innovative program has been designed to deliver targeted learning outcomes in the key aspects of Leadership, Change Management, Innovation and Digital marketing.

The Evolve Program will be delivered with BSB61015 Advanced Diploma of Leadership and Management – a highly sought after qualification. Participants will be awarded the qualification on completion of the program and once all appropriate assessments have been submitted and marked as competent by the assessor.

Evolve will be delivered in workshop sessions throughout 2016 and 2017 plus provide quality peer networking opportunity with like-minded professionals throughout the program.

The program will consist of structured workshops, hosted by ISM at the idyllic learning and Innovation centre on Jones Bay Wharf at Pyrmont, Sydney.

In addition to a sort after qualification, Evolve will also deliver additional tailored sessions and field trips, designed to introduce you to a range of specific skills required of future leaders in the financial services industry. This will include a field trip to an innovative business environment, presentations by experienced industry executives, leaders, and digital marketing specialists.

Our experienced facilitators will deliver a specifically designed program focusing 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 a coach
- Customer Experience - How to map the customer journey

The program will commence during November 2016 and continue throughout the remainder of the year and into 2017. Additional details on dates follow later in this information pack.



Recommended participants:

We recommend attending this program if you or employees in your organisation are:

- Practice managers
- Business that have more than one broker
- BDM's
- Up and coming leaders within aggregators or peak bodies
- Anyone wanting to further their leadership and business skills

Positions are limited, so please act quickly to secure your spot.



Workshop structure

Workshop Session	Topic	Days	Session Dates
1	Providing Leadership <ul style="list-style-type: none">▪ Facilitating designed thinking▪ Building a collaborative culture▪ Understanding performance balanced scorecard methodology▪ Advanced communication skills for handling complex environments▪ Effective delegation▪ Succession planning▪ How to be an effective communicator▪ Applying key aspects neuroscience of leadership	2 days (includes the introduction to program)	Monday 14 th and Tuesday 15 th November, 2016 9am – 5pm
2	Key Speaker – Industry Leader discussion <i>Discussing key aspects of the industry</i>	Evening event. Approx. 2 hours, Monday 14 th November. 4.30 – 6.30 pm. Drinks and snacks will be provided.	
3	Strategic Planning <ul style="list-style-type: none">▪ Overview of strategy relating to the Financial Services Industry▪ Impact of regulation▪ Managing risk▪ Managing funds▪ Introduction to six sigma and process improvement▪ Understanding prudential guidelines	2 days	Monday 20 th and Tuesday 21 st of February, 2017 9am – 5pm



Workshop structure

4	<p>Identify and build business innovation</p> <ul style="list-style-type: none"> ▪ Impact of digital Innovation ▪ Understanding the consumer mind ▪ Design thinking methodology ▪ Creating an innovative culture ▪ Impact of continuous improvement ▪ Designing and implementing the perfect broker model ▪ Advanced spread sheet analysis ▪ Advanced business modeling ▪ Structuring and submitting finance applications for property development/capital investment/infrastructure investment 	2 days	<p>Monday 3rd and Tuesday 4th April, 2017</p> <p>9am – 5pm</p>
5	<p>Succession Planning and business modelling</p> <p>Designing corporate structures</p> <p>Understanding impact of share issue and other incentives to lock in key personal</p>		<p>Wednesday 5th April, 2017</p> <p>9am- 5pm</p>
6	<p>Planning for Marketing opportunities</p> <ul style="list-style-type: none"> ▪ Life cycle, life stage and psychographic segmentation ▪ Social media and its role in strategic communication ▪ Sales force management ▪ Customer Experience ▪ Business Development Strategy ▪ Developing professional and business networks ▪ Designing and managing referral partnerships ▪ Using ISM’s “Wheel of fortune” 	2 days	<p>Monday 24th and Tuesday 25th July, 2017</p> <p>9am – 5pm</p>
7	<p>How to plan and implement Digital marketing</p>		<p>Wednesday 26th July 2017.</p> <p>9am - 1pm.</p>



Workshop structure

8	Leading change <ul style="list-style-type: none">▪ Creating a change ready culture▪ Understanding change dynamics including resistance▪ Strategies for change▪ Managing the change process	1 day	Monday 18th September, 2017 9am – 5pm
9	Managing Finance and Risk <ul style="list-style-type: none">▪ 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	Tuesday 19 th September, 2017 9am – 5pm
10	Innovation Forum Innovation session. Venues TBA		Wednesday 20th September, 2017 9am – 2pm Location: Sydney
Online	Planning for People capability <ul style="list-style-type: none">▪ Develop and understanding talent plans▪ Managing staff engagement▪ Nurturing performance▪ Managing underperformance▪ Using communication and feedback to create a high performance culture	Online	Delivered Online



Non Accredited sessions

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

Session 2: Industry Leader discussion

Opportunity to meet with industry representatives regarding the future of the financial services industry, managing through change, and their own expectations of industry leaders.

Session 5: Delivering quality presentations

Delivered in a half day session by ISM

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

Session 7: How to plan and implement Digital marketing

Facilitator to be confirmed.

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

Suggested content:

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

Session 10: Storefront innovation

Half-day field Trip, conducted in Sydney. The session will attend locations and meet with leaders in innovation within and outside of industry. Included will be innovative business environments. For example Telstra Innovation centre.



Investment:

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

The investment for the program is \$6,250 per participant.

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.

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

Positions are limited, so please act quickly to secure your spot.

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



Next Steps

1. Enrol into the Evolve program via <http://www.ism.nsw.edu.au/evolve>
2. An invoice will be sent for the program payment
3. Once payment is received we will grant access to online learning portal to commence the required pre reading.
4. Book the session dates into your diary

What is required to be completed before the first session?

- View Participants profile resource (on online portal)
- Complete all pre reading required (on online portal)

Visit <http://www.ism.nsw.edu.au/evolve> for more information and to enrol into the program

Need more information?

If you would like more information on the program please contact Amy Simpson, Business Development Manager, Institute of Strategic Management or our admin team on the below details:

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