



Strategic Planning

Essential Skills for Business and Leadership Growth

Northeast Ohio's Foremost Strategic Planning Course

Building Successful Companies Through Strategic Thinking, Vision And Execution Since 1979

Take your Business to the Next Level

Is your business as profitable as it could be? Do you spend too much time working in your business instead of on your business? Are you working too hard/ too many hours?

Strategic Planning: Essential Skills for Business and Leadership Growth will help you overcome obstacles while building a solid foundation for growth through executive level business education and relationships with peers and advisors.

A Plan to Succeed: Why this Course is a Must

A well designed strategic plan can improve business performance, increase profits and focus your efforts. Working with class instructors and your personal mentor, you will examine every element of your business, outline goals and performance objectives, create an action plan and lay out the expected results. Additionally, you will work with peers and advisors to address common challenges that face many business leaders:

- Increase Profitability
- Adapting to Rapidly Changing Markets
- Succession Planning
- Finding and Hiring the Right People
- Securing Capital
- Managing Growth

A Powerful Tool for Your Business

Strategic Planning: Essential Skills for Business and Leadership Growth is a results-oriented process delivering a concentrated executive level business education focused on your business. Based on your business type, you will be matched with a course alumnus who will serve as your mentor and attend each of the ten Saturday morning class sessions with you. With the guidance of your mentor and support of your peers, your goals will come into focus as you explore issues such as:

- Your Company Mission – Is it focused, supportive of your strategic goals and well understood throughout your organization?
- Your Strengths and Weaknesses – Organizationally, by product and by market and their alignment with external opportunities and threats.
- Customers – Do you understand why they buy from you?
- Products and Services – how are you positioned against your competition?
- What is your strategy for differentiation?
- Does your company culture support your mission?
- Management and Compensation Systems – Are they supporting your goals?
- Quality of Life – Are you getting what you want out of your business?

BY THE NUMBERS

42

Number of Years the Course has Helped Business Owners Grow

40

Classroom & Mentor Hours to Complete the Program

773

Alumni who have Successfully Completed the Course

www.SPC30.com

It's Time to Make More Money and Take Your Business to the Next Level. Join Hundreds of Alumni who have Completed this Course and Changed Their Businesses for the Better!

Program Agenda 2023-2024

SESSION 1

September 23, 2023

- Introductory Preparation
- What & Why - Beginning with The End in Mind
- Harold Maxfield, Cavitch, Familio & Durkin Co, LPA - *"Succession Options"*
- Introduction to Traction & EOS

SESSION 2

October 7, 2023

- Corporate Strategy / SWOT Analysis
- Paul & Cindy Chaffee - *"Mission / Vision"*
- Values, Vision, Mission

SESSION 3

October 21, 2023

- Strategic Business Units (SBU)
- Elizabeth Irwin, Irwin & Associates, CPA - *"SBU Performance Analysis"*

SESSION 4

November 4, 2023

- Generic Competitive Strategies
- John Milos, ex-CEO, Stylin' Concepts - *"Three Things to Grow a Business Rapidly and Very Profitably"*

SESSION 5

November 18, 2023

- SBU Competitive Analysis
- Strategies to Improve Competitive Positioning
- Dan Carbone, Virteom LLC - *"Your Business's Online Presence and Online Sales"*

SESSION 6

December 16, 2023

- SBU Strategic Plans
- Winning at the Point of Sale, Sales Forecasts
- Hal Becker - *"Sales & Customer Service"*

SESSION 7

January 13, 2024

- Customer Acquisition and Retention
- Paul Chaffee - *"Net Promoter Scores" (NPS)*
- Overcoming Organizational Obstacles
- Leadership Development and Boards

SESSION 8

January 27, 2024

- Implementing Strategy with EOS
- Human Resources Function
- Key Manager Selection
- Cindy Chaffee - *"Growing Leaders in Your Organization"*

SESSION 9

February 10, 2024

- Systems Performance Measurement Controls
- Financial Performance & Planning Tools
- Putting the Plan Together

SESSION 10

February 24, 2024

- Valerie Schmitz, Kelly Day Financial Services - *"Personal Finance - Planning for Success"*
- Student Presentations

DATES

- September 2023 - February 2024
- Saturday mornings

TIME

- 8:00 am - 12:00 pm

LOCATION



6161 Oaktree Blvd, Ste 130
Independence, OH 44131

COURSE FEE

- \$3,995
- Discounts available for course firm alumni and multiple participants from the same firm
- **Early-bird special discounts available**
- All sessions will be recorded and available for review

CONTACT

info@SPC30.com
www.SPC30.com

This Strategic Planning Course has played a huge role in the success of my company. The insights gained, lessons learned and relationships developed have enabled our growth as a company and my personal transition from technician to leader.

— Paul Doherty, President, Wecall Inc.

Instructors



Paul Chaffee

Paul Chaffee, a passionate advocate for technology and innovation in education, has dedicated the majority of his career to providing technology services and solutions to K-12 schools. Under his leadership as CEO and co-founder of Software Answers, Inc., the company grew from a technology consulting start-up in 1994 to a leading provider of K-12 software solutions for the state of Ohio. ProgressBook started out as an online grade book. It eventually matured to become a comprehensive K-12 Student Information System that was used by over 72% of the Ohio Public Schools with a 98% retention rate. Software Answers was sold to private equity in 2018. Eighteen months later Software Answers was sold to Frontline Education. Paul retired from Frontline Education in April 2021.

Today, Paul is President of PRCGen, a small consulting firm that helps organizations generate success. In addition, Paul serves as a member of the Advisory Board for this Strategic Planning Course, board member for Greater Cleveland Partnership (GCP) OHTec, member of the GCP Advocacy Committee, member of the GCP Small Business Caucus, board member for American Endowment Foundation, board of advisors for International Insurance Group, and a member of Entrepreneur Organization (EO).

Paul Graduated from Ohio Wesleyan University with majors in Computer Science and Mathematics, minors in Accounting and Economics.



David Clifford, PhD

Dave Clifford has taught at John Carroll University in the Boler College of Business for over 10 years. He earned his doctorate from Creighton University in Inner-Disciplinary Leadership and Education with a focus on Business Administration. He has been an entrepreneur in northeast Ohio for the past 20 plus years providing companies with guidance in strategic planning, executive search, marketing,

valuation, and sales planning. He is a life-long Clevelander and lives on the west side. He also runs a non-profit called For The Greater Good, Inc. which serves 250 homeless people Christmas morning with gifts, and teaches entrepreneurship in Honduras and Belize. He is also the chair of St. Mark Parish council.

Sponsors



