

LEADING ORGANIZATIONS

SYLLABI

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Written & Delivered By:



PEREGRINE

GLOBAL SERVICES

ACADEMICS • LEADERSHIP • PUBLICATIONS

LEADING ORGANIZATIONS

OVERVIEW

All of us are very much aware of the essential leadership transition from individual contributor to supervisor or manager with team-level responsibilities. Each of us made that transition and learned to grow as a leader. We learned the importance of setting the right example for our teams, leading in complex organizations, and leadership communications. We grew with each promotion and advancement during our careers.

There is a second major leadership transition that we do not talk about very often – the transition from senior manager to organizational leader, sometimes referred to as executive level leader. As organizational leaders, we find ourselves responsible for all aspects of the organization including those that we may not be very familiar with based on our experience and development within the organization. Our time horizons shift from months to years. Our responsibilities grow from single departments and functions to multiple departments and numerous functional areas.

The purpose of this program is to help you complete this transition; to further develop you as an organizational leader that include responsibilities for strategic leadership, organizational planning, governance, the workforce, customers, performance, quality, and culture.

Leadership is about fighting through the chaos of the moment to see and understand the perspective of the situation. It is our intent with this program that we help you with your strategic perspective so that you can be an effective organizational leader.

LEARNERS

This program is designed for managers and junior executives seeking to make the transition to organizational leader at the director, chief, vice president, or president levels. The program is based on our book, *Leading Organizations: Innovating for Performance Excellence* published in 2019. This book is used in conjunction with our Executive Education Program for new or emerging CEOs.

PROGRAM AUTHORS

The authors for this course include Dr. Olin Oedekoven, Dr. Krishnamurthy Venkateshiah, Dr. Douglas Gilberts, and Deborah Robbins. Olin is a retired brigadier general with the Army National Guard and CEO of Peregrine Global Services. Krishnamurthy is former CEO of two

Indian start-ups and retired university chief executive. Douglas is a Baldrige Examiner and senior mentor. Deborah has held several senior leadership positions in government and business. Collectively, the authors of this program have a total of 80 years of experience at the highest levels of organizational leadership. Peregrine Leadership Institute, a division of Peregrine Global Services, has been conducting executive-level training and development for over 10 years.

Professional Development Credits



Peregrine Global Services is recognized by the Society of Human Resource Management (SHRM) to offer Professional Development Credits for SHRM-CP® or SHRM-SCP®.

Learner Hours: 55-60 **SHRM PDC:** 40

This module may also be relevant for Continuing Education Units/Professional Development Credits with other organizations to help satisfy professional development requirements.

OVERVIEW

The program is composed of four unique, but related, modules and based on the Baldrige Performance Excellence Framework.

1. Organizational Leadership and Corporate Governance
 - a. Understanding Organizational Leadership
 - b. Skills of Strategic Leadership
 - c. Approaches to Strategy
 - d. 21st Century Strategic Leadership
 - e. Leadership Training that Works
 - f. What is Corporate Governance
 - g. How to Build Better Boards
 - h. Perspectives on the Role of the Board of Directors
 - i. Cases, Reflections, and Course Summary
2. Strategic Planning and Focus on Customers
 - a. Planning as a Process
 - b. Deliberate and Emergent Strategies
 - c. Strategic Decision Making
 - d. Strategic Leadership in Planning

- e. Organizational Structure
 - f. Strategic Control Systems
 - g. Defining Your Customers
 - h. Customer Service and Loyalty
 - i. The Elements of Value
 - j. The Service Profit Chain
 - k. Cases, Reflections, and Course Summary
3. The Workforce and Organizational Performance Management
- a. Workforce Engagement
 - b. Strategies to Improve Employee Engagement
 - c. Understanding Performance Management
 - d. Performance Management Tools
 - e. Performance Management Challenges
 - f. Risk-based Performance Management
 - g. Cases, Reflections, and Course Summary
4. Ethics and Continuous Quality Improvement
- a. Business Ethics
 - b. Ethics in Practice
 - c. Ethical Dilemmas
 - d. Current Trends in Ethical Practice
 - e. Quality and Continuous Improvement
 - f. Problem-Solving
 - g. Cases, Reflections, and Course Summary

LEARNING OUTCOMES

The learning outcomes for the program are as follows:

1. Perform organizational leadership activities.
2. Know corporate governance procedures.
3. Conduct strategic planning.
4. Establish and maintain a customer focus.
5. Conduct workforce engagement activities.
6. Conduct organizational performance management activities.

7. Establish and maintain an ethical culture.
8. Perform continuous quality improvement activities.

MODULES

Organizational Leadership and Corporate Governance

Module Learning Outcomes:

1. Understand the concept of organizational leadership.
2. Appreciate why organizational leadership is critical to business success.
3. Apply the concepts to your work, becoming a better organizational leader.
4. Understand the concept of governance and its importance.
5. Recognize the best practices in corporate governance.
6. Appreciate the role of the board and the role of shareholders and stakeholders.
7. Develop a template for successful board management.

<u>Section</u>	<u>Topics</u>
Introduction	<ul style="list-style-type: none"> • Module Purpose • Module Overview
Understanding Organizational Leadership	<ul style="list-style-type: none"> • Introduction • Seth Godin on the Difference Between Leadership and Management Video • Strategic Organizational Leadership • Summary
Skills of Strategic Leadership	<ul style="list-style-type: none"> • Introduction • Roselinde Torres: What it Takes to be a Great Leader Video • Anticipate, Challenge, Interpret, Decide, Align, and Learn • Organizational Leadership Video • Summary
Approaches to Strategy	<ul style="list-style-type: none"> • Introduction • Four Approaches to Set Strategy • Summary
21 st Century Strategic Leadership	<ul style="list-style-type: none"> • Introduction • Leadership vs Management, What's the Difference? Video

	<ul style="list-style-type: none"> • The Paradoxes of Leadership • Simon Sinek: Why Leaders Eat Last Video • Summary
Leadership Training that Works	<ul style="list-style-type: none"> • Introduction • Training Leaders on Leadership • Summary
Cases, Reflections, and Module Summary	<ul style="list-style-type: none"> • Summary • Reflective Questions • Case Studies
What is Corporate Governance?	<ul style="list-style-type: none"> • Introduction • Responsibilities of the Board of Directors Video • The Challenges of Governance • Best Practices in Governance • Case Studies in Corporate Governance • The Purpose of Corporate Governance • Compensation Issues • Summary
How to Build Better Boards	<ul style="list-style-type: none"> • Introduction • Effective Board Governance Video • Board Composition • The Role of Shareholders • Case Study in Monitoring the Monitors • Principles of Good Governance • Summary
Perspectives on the Role of the Board of Directors	<ul style="list-style-type: none"> • Introduction • A Legal Perspective • A Governance Perspective • An Alternate Perspective • Enlightened Value Maximization • Readings on the Role of the Board of Directors • Summary
Cases, Reflections, and Module Summary	<ul style="list-style-type: none"> • Summary • Reflective Questions • Case Studies

Strategic Planning and Focus on Customers

Module Learning Outcomes:

1. Understand the concept of planning in general, and strategic planning in particular.
2. Appreciate the idea of strategy as an emergent process.
3. Comprehend strategic decision making, challenges, and techniques for improvement.
4. Recognize the role of strategic leadership in achieving goals.
5. Design suitable organizational structures for achieving your stated goals.
6. Understand the role of strategic control systems in achieving your stated goals.
7. Understand the drivers of superior customer service.
8. Deploy processes that lead to a great customer experience.
9. Measure key indicators of your efforts.
10. Develop a competitive advantage based on customer service.

<u>Section</u>	<u>Topics</u>
Introduction	<ul style="list-style-type: none"> • Module Purpose • Module Overview
Planning as a Process	<ul style="list-style-type: none"> • Introduction • What is Strategic Planning, Really? Video • The Planning Process • Strategic Planning • Summary
Deliberate and Emergent Strategies	<ul style="list-style-type: none"> • Introduction • Autonomy and the Role of Lower-level Managers in Strategy • Serendipity and Strategy • Intended and Emergent Strategies • Strategic Planning in Practice • Decentralized Planning • Summary
Strategic Decision Making	<ul style="list-style-type: none"> • Introduction • Cognitive Biases in Decision Making • Techniques to Improve Decision Making • Summary

Strategic Leadership in Planning	<ul style="list-style-type: none"> • Introduction • Skills of Strategic Leaders in Planning • How to Develop Key Performance Indicators Video • Summary
Organizational Structure	<ul style="list-style-type: none"> • Introduction • Traditional Organizational Structures • Matrix Organizational Structure • Emerging Structures • Teal Organizations • Summary
Strategic Control Systems	<ul style="list-style-type: none"> • Introduction • Types of Strategic Control Systems • Strategic Reward Systems • Summary
Cases, Reflections, and Module Summary	<ul style="list-style-type: none"> • Summary • Reflective Questions • Case Studies
Defining Your Customers	<ul style="list-style-type: none"> • Introduction • I Was Seduced By Exceptional Customer Service Video • Defining Your Customers – Internal and External Customers • Segmentation • Identifying Your Target Market • Evaluating Market Segments - Segment Structural Attractiveness • Evaluating Market Segments - Segment Size and Growth • Evaluating Market Segments - Company Objectives and Resources • Selecting Target Market Segments • Positioning • Recent Developments in Segmentation • Post Hoc Segmentation Methods • Summary
Customer Service and Loyalty	<ul style="list-style-type: none"> • Introduction • What is customer service? The 7 Essentials to Excellent Customer Service Video

	<ul style="list-style-type: none"> • Why is loyalty important? • How to Ensure Minimal Customer Effort • Service Quality Principles • Service Quality Components • Summary
The Elements of Value	<ul style="list-style-type: none"> • Introduction • Stockdale Paradox: A Message for Uncertain Times Video • Understanding the Elements of Value • Jim Collins Productive Paranoia Video • Summary
The Service Profit Chain	<ul style="list-style-type: none"> • Introduction • Defining the Service Profit Chain • Summary
Cases, Reflections, and Module Summary	<ul style="list-style-type: none"> • Summary • Reflective Questions • Case Studies

The Workforce and Organizational Performance Management

Learning Outcomes:

1. Understand the importance of workforce engagement in an organization.
2. Appreciate the principles of effective workforce engagement.
3. Apply the principles to build an irresistible organization.
4. Understand the concepts of enterprise performance management.
5. Appreciate the different approaches to performance management, such as the Balanced Scorecard, strategy maps, activity-based costing, and customer lifetime value.
6. Apply appropriate methods to your situation or organization.
7. Measure results.
8. Learn from your results and start the journey of continuous improvement.

<u>Section</u>	<u>Topics</u>
Module Introduction	<ul style="list-style-type: none"> • Module Purpose • Module Overview

Workforce Engagement	<ul style="list-style-type: none"> • Introduction • Simon Sinek: How Great Leaders Inspire Action – Start With “Why” Video • The Changing Nature of Employee Engagement • A Focus on Simplicity • Capturing Real-Time Feedback • Why employee engagement matters Video • Placing Employee Engagement at the Center of Everything We Do • Summary
Strategies to Improve Employee Engagement	<ul style="list-style-type: none"> • Introduction • Why is employee engagement important for an organization's success? Video • Improving Employee Engagement • HR Basics: Employee Engagement Video • Strategy #1: Values and Purpose • Strategy #2: Communication • Strategy #3: Health and Wellness • Strategy #4: Workspace and Environment • Strategy #5: Create Well-Defined Roles • Strategy #6: Relationships with Colleagues • Strategy #7: Employee Recognition and Incentives • Strategy #8: Creating an Organization of Amazing Managers • Strategy #9: Cultivating Personal Growth and Development • Strategy #10: Completing the Puzzle • Summary
Cases, Reflections, and Module Summary	<ul style="list-style-type: none"> • Summary • Reflective Questions • Case Studies
Understanding Performance Management	<ul style="list-style-type: none"> • Introduction • Good to Great and Great by Choice Video • What Is Performance Management? • Practical Models for Performance Management • Summary

Performance Management Tools	<ul style="list-style-type: none"> • Introduction • Identifying the Performance Management Tools • Activity-Based Costing (ABC) • Supply Chain Management • System Framework for Performance Management • Summary
Performance Management Challenges	<ul style="list-style-type: none"> • Introduction • Evolution of Performance Management • A Business Case for Dropping Appraisals • Challenges That Persist • Summary
Risk-based Performance Management	<ul style="list-style-type: none"> • Introduction • Social Intelligence and Leadership Video • Enterprise Risk Management • Summary
Cases, Reflections, and Module Summary	<ul style="list-style-type: none"> • Summary • Reflective Questions • Case Studies

Ethics and Continuous Quality Improvement

Module Learning Outcomes:

1. Understand the meaning of ethics and the principles governing business ethics.
2. Appreciate why it is important for organizations and individuals to be ethical.
3. Apply ethical principles to resolve dilemmas that arise in an organization.
4. Understand the basic concepts of Quality Management and Continuous Improvement.
5. Use different approaches to achieve process improvement.
6. Develop a problem-solving approach applicable in a variety of situations.
7. Understand the current approaches to quality, such as Six Sigma and Lean.

<u>Section</u>	<u>Topics</u>
Module Introduction	<ul style="list-style-type: none"> • Module Purpose • Module Overview

Business Ethics	<ul style="list-style-type: none"> • Introduction • Leadership Ethics Video • What is Ethics? • Normative, Descriptive, Applied, and Meta Ethics • Eastern Approaches to Ethics • Business Ethics Essentials • Common Ethical Issues • Everything Counts in Ethics • A System Framework for Business Ethics • Recruitment and Selection: Hiring Ethical People • Summary
Ethics in Practice	<ul style="list-style-type: none"> • Introduction • Ethical Leadership and Communication Video • Code of Ethics and Code of Conduct • Ethical Decision-Making • Ethical Leadership • Work Goals • Managing Stress • Measuring the Ethical Dimension of Performance • Measuring Leadership Skills • Stakeholder Relations • Empowering Ethical Employees • Effective Teams • Appreciative Inquiry • Summary
Ethical Dilemmas	<ul style="list-style-type: none"> • Introduction • Ethical Dilemma #1 • Ethical Dilemma #2 • Ethical Dilemma #3 • Ethical Dilemma #4 • Ethical Dilemma #5 • Ethical Dilemma #6 • Ethical Dilemma #7 • Ethical Dilemma #8

	<ul style="list-style-type: none"> • Ethical Dilemma #9 • Ethical Dilemma #10 • Ethical Dilemma #11 • Ethical Dilemma #12 • Summary
Current Trends in Ethical Practice	<ul style="list-style-type: none"> • Introduction • Corporate Citizenship • The Natural Step Framework • Summary
Cases, Reflections, and Module Summary	<ul style="list-style-type: none"> • Summary • Reflective Questions • Case Studies
Quality and Continuous Improvement	<ul style="list-style-type: none"> • Introduction • What is the difference between quality assurance and quality improvement? Video • Understanding Quality Management & Continuous Improvement • Continuous Improvement Methodology • Continuous Improvement Teams • Quality and Performance in Management Video • Basic Tools of Quality • Summary
Problem-Solving	<ul style="list-style-type: none"> • Introduction • Doing Problem-Solving • Return on Investment • After Action Reviews • Six Sigma, Lean Six Sigma, and POKA-YOKE • What is Lean Six Sigma? Video • A Contrarian View • Summary
Cases, Reflections, and Module Summary	<ul style="list-style-type: none"> • Summary • Reflective Questions • Case Studies

RESOURCES

Oedekoven O. O., K. B. Venkateshiah, D. J. Gilbert, & D. K. Robbins (2019). Leading Organizations: Innovating for Performance Excellence. Gillette, Wyoming: Peregrine Pathways.

Downloads:

- A. Selection and Orientation for New Members to the Board of Directors
- B. Responsibilities of the Board of Directors
- C. Position Description for a Member of the Board of Directors
- D. Committee Template for the Board of Directors
- E. Key Terms and Definitions for the Board of Directors
- F. Developing a Manual for the Board of Directors

ASSESSMENT

Throughout the module, there are in-progress quizzes and short exercises to ensure understanding of the instructional content. A completion certificate is issued when the learner obtains at least 80% on the final exam.

The learner must complete each module, case study questions, and reflection questions to be awarded a completion certificate for the program.

HOURS AND ARTICULATION

Learner hours for the program are as follows.

<u>Modules</u>	<u>Hours</u>
Organizational Leadership and Corporate Governance	
Introduction	1
Understanding Organizational Leadership	1
Skills of Strategic Leadership	1
Approaches to Strategy	1
21 st Century Strategic Leadership	1
Leadership Training that Works	1
What is Corporate Governance	2
How to Build Better Boards	2
Perspectives on the Role of the Board of Directors	3
Cases, Reflections, and Summary	2
Total Hours:	15
Strategic Planning and Focus on Customers	
Introduction	1
Planning as a Process	1
Deliberate and Emergent Strategies	2
Strategic Decision Making	1
Strategic Leadership in Planning	1
Organizational Structure	1
Strategic Control Systems	1
Defining Your Customers	2
Customer Service and Loyalty	1
The Elements of Value	1
The Service Profit Chain	1
Cases, Reflections, and Summary	2
Total Hours:	15
The Workforce and Organizational Performance Management	
Introduction	1
Workforce Engagement	2
Strategies to Improve Employee Engagement	2
Understanding Performance Management	2
Performance Management Tools	2
Performance Management Challenges	2
Risk-based Performance Management	2
Cases, Reflections, and Summary	2
Total Hours:	15
Ethics and Continuous Quality Improvement	
Introduction	1
Business Ethics	2
Ethics in Practice	2
Ethical Dilemmas	3
Current Trends in Ethical Practice	1
Quality and Continuous Improvement	2
Problem-Solving	2
Cases, Reflections, and Summary	2
Total Hours:	15
Total Program Hours:	60