

# Being more strategic

Intermediate  
level

This full day session helps delegates to think and act more strategically – whether they are developing business or marketing plans, managing day-to-day operational projects or supporting fee-earners in their work.

It provides an understanding of the leading strategy models (from the most established to the newest) and helps delegates bring a more strategic approach to all their activities. Delegates participate in exercises to develop their strategic abilities by using a variety of strategic tools.

The workshop qualifies for 6 hours CPD.

## Topics covered

Why choose PM  
Forum training?  
See overleaf...

- **Introduction**
  - What do we want to achieve?
- **Thinking strategically**
  - Strategic planning vs strategic thinking
  - The difference between tactical and strategic
  - Strategic thinking process
  - Strategic thinking competencies (assessment)
  - Systems, divergent and creative thinking
  - Focus and thinking in time
  - Encouraging strategic thinking in your firm
- **Strategic processes**
  - Strategy development process
  - Strategic analysis process
  - Visioning: Seeing the big picture and hypothesising
  - Goal and objective setting
  - Finding core challenges
  - Developing strategic solutions
  - Opportunism and risk management
  - Stakeholder analysis and cultural change
- **How business strategy has changed**
  - Corporate planning
  - Applying leading strategy models to the professions
  - Analysis, choice and implementation (Johnson & Scholes)
  - McKinsey and Mintzberg (then and now)
  - Portfolio analysis and competitive analysis (Porter)
  - Core competencies (Hamel and Prahalad)
  - Balanced Scorecard (Kaplan & Norton)
  - Scenario planning (dealing with change and chaos)
  - Strategy and leadership (Rumelt)
- **Strategic marketing choices**
  - Choosing markets and developing niches
  - Competitive positioning and branding
  - Strategic alliances and partnerships
  - Creating value propositions and challenging assumptions
  - Adapting and developing products/services
  - Strategic thought leadership and communication campaigns
  - Effective pricing strategies
- **Summary and close**

## Eligibility

This training course is open solely to member firms of the **PM Forum**, a worldwide group of over 4,000 marketers in professional services firms. Visit [www.pmforumglobal.com](http://www.pmforumglobal.com)



## Thursday 21 March 2019

The full-day workshop takes place from 10.00 to 17.00 and includes lunch, morning and afternoon refreshments.

**To facilitate interaction, workshops are restricted to 18 attendees – maximum of four per firm**

## Trainer



**Kim Tasso** has worked within and for over 200 professional partnerships in the legal, accountancy and property sectors for over 20 years and continues to do so as a management consultant.

She also has direct client exposure from working with organisations in the technology, education, creative, media, real estate and not-for-profit sectors and through her work with a leading business school.

Unusually, she combines psychology, marketing and business qualifications so is effective both as a professional trainer, facilitator and coach and also as a subject matter expert in a variety of strategy, marketing, selling and relationship management topics.

She is highly rated as a trainer and coach for lawyers, accountants and surveyors and also lectures on Chartered Institute of Marketing (CIM) professional marketing qualifications for Cambridge Marketing College.

She is the author of books on growth strategies, business development, media relations and business development and a prolific conference speaker and journalist. She is commissioning editor for *PM* magazine.

Further information at [www.kimtasso.com](http://www.kimtasso.com).

**For more information on other training workshop visit [www.pmforum.co.uk/training](http://www.pmforum.co.uk/training)**

## Why PM Forum training?

Courses are designed and delivered by qualified and experienced professionals who:

- have substantial experience working with both **senior fee-earners and marketing/business development professionals** in large and small professional service firms across the **legal, accountancy and property industries** as well as a variety of client markets
- have psychology credentials and many years' experience in **learning and development** to ensure an optimum learning experience
- are **subject matter experts** in strategy, marketing, selling, client relationship management and interpersonal skills who continue to practice and are therefore familiar with the latest developments

And delegates receive a **productive learning experience** because:

- There is a balance between knowledge transfer and active learning through **interactive discussion** and group exercises
- Courses are highly **experiential** – where idea sharing and networking are encouraged
- As well as copies of the presentation material, courses also include work sheets and **supplementary materials** with guidance for further learning. Some courses have exclusive booklets tailored to the needs of delegates
- Course leaders are experienced coaches with experience in **career development** and certificates of completion are issued for use in **Continuing Professional Development (CPD)**
- Dialogue can continue after training through members-only **LinkedIn communities**

## Venue

tbc, Central London

## Fees

|                          |            |
|--------------------------|------------|
| First attendee           | £370 + VAT |
| Second attendee          | £360 + VAT |
| All subsequent attendees | £350 + VAT |

**Maximum of four attendees from the same firm.** Prices are only for attendees booked concurrently. No booking can be confirmed without payment. The fee includes: tea/coffee in morning and afternoon • lunch • handout of workshop material

## Cancellations/Substitutions

Due to the restricted number of places, refundable cancellations are only accepted up to one month prior to the event (a cancellation fee of £25 + VAT will be incurred per person). Substitutions can be made at any time. PMI reserves the right to cancel with no liability beyond refund of fees paid.

## Being more strategic – 21 March 2019

|                |                    |                |
|----------------|--------------------|----------------|
| Name .....     | Name .....         | Name .....     |
| Position ..... | Position .....     | Position ..... |
| Firm .....     | Type of firm ..... |                |
| Address .....  |                    |                |
| .....          |                    | Postcode ..... |
| Tel .....      | E-mail .....       |                |

Please enclose a cheque made payable to *Practice Management International LLP*  
or pay by Visa/Mastercard/Maestro/AmEx (*please circle one*)

|                        |                    |                      |
|------------------------|--------------------|----------------------|
| Cardholder name: ..... | Amount: £ .....    |                      |
| Card number: .....     | Expiry date: ..... | Security code: ..... |

Signed ..... Date .....

*Confirmation of booking will be sent by return along with a VAT receipt*

Please return this form to: **PM Forum, 422 Salisbury House, London Wall, London EC2M 5QQ**  
**Tel: 020 7786 9786 training@pmint.co.uk www.pmforum.co.uk**

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