

# SIMPLIFIED STRATEGIC PLANNING

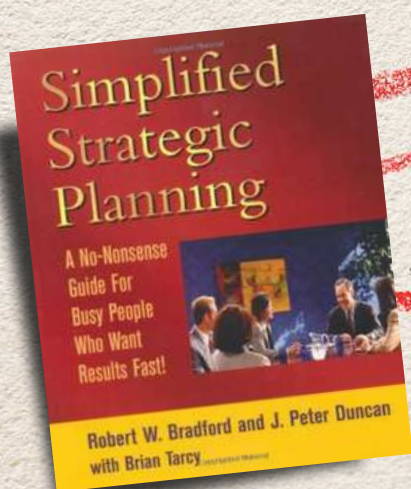
**A No-Nonsense Guide for Busy People Who Want Results Fast!**

**25 & 26 September 2025: Manila**

*Facilitated by:*

**Robert Bradford**

Co-Author of Simplified Strategic Planning Manual and Simplified Strategic Planning,  
A No-Nonsense Guide for Busy People Who Want Results Fast!



**PLANNING**

## *Rave Reviews*

*"The trainer provided many examples from previous experience and was able to provide answers that were practical. He filled in gaps in what I know about strategic planning. Kexxel Group ensured that the logistics of the event were well organized"*

**Ryan G. Tumbagahan - Head, Corporate Planning & Process Management, Meralco**

*"Robert exhibited extreme expertise in the field. And the relevance of content shared was the strength of the event. Kexxel Group exhibited excellent courteous service by Adora Tan"*

**Cherie S. Sia - Head, Strategic Initiatives Division, Metropolitan Bank & Trust Company, The Philippines**

*"I appreciate that Robert gave a lot of actual events where the framework and concepts had been applied. This made the topics more relatable. And it's very practical that I know exactly how to apply and do it in my company. Kexxel is very organized from beginning until the end of the training."*

**Rizza Blanco Latorre - VP Head of Strategy Management Office, Metro Pacific Tollways Corporation, The Philippines**

*"Robert is a truly great and reliable speaker/trainer given his experiences in the corporate/financial world which are all firsthand & factual. Robert is really an expert in the field. A lot of AHA moments for me! First time to hear and attend an event organized by Kexxel group & I have to say, though set-up was simple, it was effective & very professionally handled."*

**Edgardo R. Marcelo Jr. - Head, Transaction Banking Division, Bank of The Philippine Islands (BPI), The Philippines**

*"Mr. Bradford is very seasoned and experienced in strategic planning and his best practices can be a great help in providing road maps."*

**Josephine G. Yap - President & CEO, Filinvest Land Inc.**

*"Robert is very pragmatic and knows how to engage his audience. His breadth of experience makes for very colorful examples."*

**Janeen-Hannah Uy - Head, Strategic Planning and Project Management Division, P. J. Lhuillier Inc., The Philippines**

**Kexxel**  
GROUP

## WHAT WILL YOU LEARN BY THE END OF THIS COURSE?

### Why Most Companies Fail at Strategic Planning

- Why strategic planning requires a big-picture approach, rather than a single “magic bullet” solution
- How to craft a strategy that is thorough, yet simple

### How to Create a Great Strategic Team

- Why you should never plan by yourself
- Who should be on your team...and who must NOT be
- How to build team commitment
- Ways to pinpoint the best team leaders

### How to Dominate Your Market

- Why you must define your market with laser-like focus when creating a strategic plan
- The right way to segment your market for maximum profits
- The #1 mistake most companies make when doing segmentation
- How to gain market share...no matter how tough the competition is

### How to Get Information You Need

- Why the information you gather is critical to the success of your plan
- The hands-down best way to gather information
- Why you never want too much information...and how to know when you have enough
- The truth about who should gather information for you (hint: the answer may surprise you)

### How to Measure Key Success Factors

- The key areas to measure that drive your business
- The accurate way to measure intangibles
- How to create a profitability analysis to uncover and enhance your best profit centers
- The one thing you must always measure to ensure the very survival of your company

### How to Find Your Unique Strategic Competency

- Why every company must find its strategic competency and what to do if you can't find one
- The three elements of every strategic competency
- How to sustain your strategic competency
- The three specific tests that every strategic competency must pass

### How to Make Good Assumptions

- How to avoid one of the biggest mistakes of strategic assumptions
- How to anticipate the turning points in a trend
- What to do when it's impossible to make a reasonable prediction
- The four steps to minimizing assumption errors
- How to prepare for the unexpected

### How to Select and Exploit Your Best Opportunities

- How to avoid the dreaded “group think”
- How to use creative brainstorming to uncover breakthrough ideas
- How to stimulate creative thinking about opportunities
- The four criteria you should use to assess the viability of any new opportunity

### How to Protect Your Company From Potential Threats

- The most important question your company must answer to anticipate any strategic threats
- The five steps you must take to minimize the impact of any significant strategic threat
- How to evaluate perceived threats to identify those with the greatest potential impact

### How to Determine Your Strategic Focus

- The six options for your company's strategic focus
- How to align your strategic focus with your strategic competencies
- The four key factors of market attractiveness
- The seven key characteristics of your competitive position
- The five core business strategies
- How to select the best strategy for each market segment
- The four options for your competitive strategy
- How to select a competitive strategy for each market segment

### Get From Where Your Are To Where You Want to Be

- How to set measurable, specific and achievable strategic objectives
- How to achieve 80% to 90% of your strategic objectives (most company achieve only about 30% of their objectives)

### How to Best Allocate Your Resources To Meet Your Objectives

- How to determine resource needs and availability
- How to find the money and the time to carry out your strategic plans

### How to Most Effectively Use Your Strategic Plan

- Why the planning process produces better results each time you use it
- How to use your daily behavior to communicate your plan throughout the company
- When to update your plan
- How often to monitor your progress



# Course Agenda – Day 1

## Introduction

This course will teach you both the concepts and the step-by-step logistics behind the Simplified Strategic Planning process, a comprehensive approach to creating a complete, workable strategic plan in about 7 days of meetings. The focus of the course is on reaching a robust strategic conclusion quickly and driving from that conclusion to effective implementation plans.

## Session 1: External Situation

- Markets
  - Key data to collect on markets for strategic planning
  - Customer behavior and strategy
  - Market segmentation
- Competition
  - Key data to collect on competitors
  - Where to get competitive data
  - What matters most about a competitor
- Other external factors
  - How technology can make or break strategy
  - Supplier Market dynamics
  - Economics and strategy

## Session 2: Internal Situation

- Financials
  - The role of the balance sheet
  - Assessing your income statement
- Measures of performance
  - Measures you should use to think about strategy
  - Why financials aren't enough
  - How to select the most important measures
- Profitability analysis
  - Using the profitability analysis to spot strategic issues
  - Why profitability shouldn't dictate strategy

## Session 3: Strategic Capabilities and Competencies

- Quick strengths and weaknesses
  - Defining your capabilities quickly, without fuss
  - Pitfalls in using strengths and weaknesses in strategy
- Strategic competencies
  - Understanding competencies, and why you should invest in them
  - Identifying your strategic competency

### Group Exercise:

An example of strategic competency in a multi-unit company

## Session 4: Assumptions

- Market assumptions
  - Projecting changes in your markets
  - Key data to assess in formulating strategy
- Competition assumptions
  - How to see how you will stack up against the competition in the future
  - Understanding how you can change your competitive position
- Opportunities and threats
  - Brainstorming the best opportunities
  - How to separate the best opportunities from the good ideas
  - Highlighting the most critical threats to your strategy
- Industry scenario and winners' profile
  - Projecting the more distant future
  - Using the far future to guide your strategic thinking

## Why You Should Attend

This course is perfect for you if your existing strategic planning is not giving you the results you need or if you are new to strategic planning.

Poor strategic planning is worse than no strategic planning. It can be a big waste of time and money. Even worse, it can lead to disaster. Avoid all this with **Simplified Strategic Planning** – a proven process to focus for superior performance without straining your resources.

Whether you've been doing strategic planning for years or starting from scratch, you can acquire a streamlined process for developing and implementing your strategy. In just two days, you will have learned this time-tested methodology, which has produced outstanding results for thousands of companies from a wide variety of business types.

# Course Agenda – Day 2

## Introduction

On day two, we draw upon the data and ideas from day one and combine them to produce strategies, objectives and execution plans. The focus of this day is on devising well-integrated strategies that create competitive advantage, and managing execution.

## Session 1: Strategies

- Strategic assessment
  - Identifying market attractiveness
  - Identifying your competitive position
  - Using your position to begin strategic thinking
- Strategic issues
  - The one strategic issue every company must address
  - How to identify and resolve most of your strategic issues
- Strategies
  - Defining strategies for market segments
  - Capturing your vision about your strategic focus
  - Building a set of capabilities to support your vision

## Session 2: Goals and Objectives

- Mission statement
  - Why you need a mission statement – and why you don't
  - How to get your mission written down in 30 minutes
- Goals
  - Defining corporate goals
  - Relating goals to measures of success
  - How goals can drive execution – and how they shouldn't
- Objective setting
  - How to set objectives for optimal execution
  - What to do with objectives that you don't select for execution

## Session 3: Action Plans

- Action plan writing process (group exercise)
  - Formulating action steps
  - Sequencing action steps
  - Allocating resources to action steps
- Rules for better execution
  - Tips from companies that achieve 100% of their objectives
  - How to build better execution into your processes and culture

## Session 4: Budgets

- Cash flow budget
  - Using the cash flow budget to protect your company
- Investment budget
  - How to prioritize spending on strategic initiatives
- Five year projection
  - Testing your strategic plan as a hypothesis
  - How to quickly use your strategic plan to create a five-year budget forecast

## Session 5: Schedules and Agendas

- Time budgeting process
  - Understanding the role of time in strategy execution
  - How to allocate time and schedule execution for better results
- Schedules
  - Putting the whole strategic planning process together – what to do and when
  - How to modify the process to fit your company
- Monitoring process
  - How to keep your strategic planning dynamic and alive
  - How to assure excellent execution by monitoring

## Who Should Attend

**This seminar is SPECIFICALLY designed for C-level executives** who are tasked with determining the best course and direction for their companies.

- CEO, CFO, COO's
  - Heads of Operations
  - Sales Directors
  - Marketing Directors,
  - IT
  - Engineering
  - Human Resource
- ..as well as other executives who report to the CEO.

## Program Schedule

0900	Start
1020	Morning Break
1230	Lunch
1500	Afternoon Break
1700	End

# Meet Your Facilitator

## ROBERT BRADFORD

**Co-Author of *Simplified Strategic Planning Manual and Simplified Strategic Planning - A No-Nonsense Guide for Busy People Who Want Results Fast!***

**Robert Bradford** is the keenly creative and insightful CEO of the Center for Simplified Strategic Planning and co-author of the *Simplified Strategic Planning Manual* and *Simplified Strategic Planning*. He has assisted many clients in a wide variety of industries, delivering outstanding results.



Recent articles by Robert include: "Re-thinking the SWOT Analysis", "Understanding the Competitive Value of Your Brand", "Dealing with Powerful Customers" "Understanding Value", and "What Does Your Company Mean". A Graduate of Princeton University, with a A.B in Military History, Robert holds an MBA degree from the Amos Tuck School of Business Administration and has completed Post-graduate work at the London Business School.

Robert is a member of the National Speakers Association and a Certified Speaking Professional. As a nationally acclaimed speaker, Robert blends a unique combination of broad knowledge and humorous insight resulting in seminars that are lively and practical at the same time. He has great relevant examples for every situation, and his presentations are crammed with great tips. A master trainer, he has spent the last nineteen years converting management theory into real-life application. Robert always stimulates great strategic thinking and leaves seminar participants with practical, "how-to" steps they can take home to put to use immediately. Robert's seminars resonate with business audiences because they are built upon years of real-world strategic decisions. This real-world management experience enables Robert to bring real nuts-and-bolts strategic thinking into every seminar presentation.

## Partial Client List

- Accident Fund Insurance Co. of America
- Colbond Inc. Holland Engineering, Inc.
- Addison Products Company
- Comar Inc.
- Exxon Mobil
- Hormel Foods Corp.
- Pal-Tech Inc.
- Verizon
- Advance Transformer Co
- Hospitality International
- Petersen Industries, Inc.
- Advantage Federal Credit Union
- Federal Reserve Bank of Cleveland
- Air Force Medical Logistics
- Mitsui Chemicals America, Inc.
- Bergen Regional Medical Center
- Principal Financial Group
- Toolbuilders Laboratories, Inc.
- AKZO Nobel Decorative Coatings
- Diversified Data Services Inc.
- DNE Technologies Inc.
- Rich Products Corp.
- ALPS Automotive, Inc.
- Doug Hendricks Consulting
- American E & S Eastern Mortgage Co., Inc.
- Bridge Bank
- Kroeschell Operations, Inc.
- Electro Chemical Finishing Co.
- Lasertel, Inc. SymCom, Inc.
- Antares Management Solutions
- Lea County Electric Coop.
- CHI Systems Inc.
- Medtronic Inc.
- Wentworth-Douglass Hospital
- Welch Allyn
- Heat Controller
- ALPS Automotive, Inc.
- TechGroup Inc.
- Antler Software
- Letterkraft Printers, Inc.
- The McFarland Institutes
- Battelle FasTest Inc.
- Liturgical Publications Inc.
- BBS Inc.
- Benjamin Moore & Co.
- L.B. White Company Incorporated Tri-Tec, LLC
- General Carbide Corp.
- U.S. Central Credit Union
- Goodrich Corp
- Turbine Component Services Members Investment
- Lighting Products Division
- CGE CareSystems, Inc.
- Champion Mortgage Group
- Estes Design & Manufacturing Inc.

## Testimonials from Past Attendees

*"Robert is articulate and gave a structured presentation. He gave examples in each chapter that helped us understand the topic better."*  
**Charlotte T. Cailao - Senior Division Manager, Ayala Land Inc.**

*"He was able to provide and relate actual experiences to the topic/agenda really well with good amount of information. Planning process focus, strategic focus, looking at data, ideas, issues and doing assessments. Kexxel had good and timely coordination."*  
**Julius D. Foronda - Chief Information Officer, eBiZolution Inc., The Philippines**

*"Robert is a good speaker knows the subject well and the actual examples shared were helpful. Kexxel was easy to coordinate with before the event."*  
**Iris April C. Palmes - Corporate Planning and Strategy Manager, Aboitiz InfraCapital, The Philippines**

*"Robert was just so detailed on taking us step by step on how to really execute the planning course after he completed."*  
**Timothy Paul E. Blanco - HR Head, Red Rock IT Security Inc., The Philippines**

*"Robert was able to leverage his decades of real-world experience to make the content relevant to the different questions and situations of the audience."*  
**Niel Dagondon - President, Edu Suite Inc, The Philippines**

*"Robert loves what he does and it shows. He was very generous in sharing from his wealth of experience & brings the theory to life via helpful anecdotes & examples"*  
**Ben Agaki - Senior Strategy & Portfolio Advisor, Brunei Shell Petroleum**

# SIMPLIFIED STRATEGIC PLANNING

Manila, 25 & 26 September 2025



Registration Inquiries: ☎ : +603 2282 1688 ☎ : +6011 1633 1600 ✉ : boon@kexxel.com

## REGISTRATION FORM

**\*Get 1 FREE seat if you send 3 pax! (3+1 Package)**

<b>Early Bird</b> Register Before 18 July 2025	<b>Special Discount</b> Register Before 29 August 2025	<b>Normal Rate</b> Register After 29 August 2025
<input type="checkbox"/> USD 1,495	<input type="checkbox"/> USD 1,595	<input type="checkbox"/> USD 1,695
<input type="checkbox"/> Send 3, get the 4th seat for FREE!		

\*Fee quoted does not include GST / VAT or withholding tax (if applicable).

**Company Name:** \_\_\_\_\_

### Delegate 1

Name : \_\_\_\_\_  
Job Title : \_\_\_\_\_  
Email : \_\_\_\_\_  
Mobile : \_\_\_\_\_  
Direct Line : \_\_\_\_\_

### Delegate 2

Name : \_\_\_\_\_  
Job Title : \_\_\_\_\_  
Email : \_\_\_\_\_  
Mobile : \_\_\_\_\_  
Direct Line : \_\_\_\_\_

### Delegate 3

Name : \_\_\_\_\_  
Job Title : \_\_\_\_\_  
Email : \_\_\_\_\_  
Mobile : \_\_\_\_\_  
Direct Line : \_\_\_\_\_

### Delegate 4 (FREE if you send 3 pax)

Name : \_\_\_\_\_  
Job Title : \_\_\_\_\_  
Email : \_\_\_\_\_  
Mobile : \_\_\_\_\_  
Direct Line : \_\_\_\_\_

### Authorization (Mandatory)

Name : \_\_\_\_\_  
Job Title : \_\_\_\_\_  
Email : \_\_\_\_\_  
  
Signature : \_\_\_\_\_  
Date : \_\_\_\_\_

**\*Signatory must be authorised to sign on behalf of contracting organization. This booking is invalid without a signature.**

### Payment Method

☐ Bank Transfer  
☐ Credit Card ☐ Visa ☐ Mastercard

Name on card : \_\_\_\_\_  
Card number : \_\_\_\_\_  
Expiry date : \_\_\_\_\_ CVV : \_\_\_\_\_  
Signature : \_\_\_\_\_



Email the completed form to [boon@kexxel.com](mailto:boon@kexxel.com)

### TERMS AND CONDITIONS

#### PRIVACY

Any information provided by you in registering for this event is being collected by Kexxel Group and will be held in the strictest confidence. It will be added to our database and will be used primarily to provide you with further information about Kexxel Group events and services.

From time to time Kexxel Group may share information from our database with other professional organizations (including our event sponsors) to promote similar products and services. Please send us an email if you do NOT want us to pass on your details. To amend your current details, advise of duplicates or to opt out of further mailings, please email us your request [info@kexxel.com](mailto:info@kexxel.com).

#### TERMS & CONDITIONS

Payment Terms: Payment must be received before the commencement of the event. Following registration, all payments must be executed within the terms herewith irrespective of attendance..

**Cancellation Fee:** A cancellation fee equivalent to 50% of the registration fee will be charged for any cancellations received more than 30 days prior to the event. A 100% cancellation fee will be charged for any cancellations received 30 days or less prior to the event, under the terms outlined below.

**Substitutions:** If you cannot attend personally, a substitute delegate is welcome to join this course. Kindly notify us directly for any substitutions.

**Force Majeure:** If Kexxel Group cancels the Event due to circumstances beyond the reasonable control of Kexxel Group (such as acts of God, acts of war, governmental emergency, labor strike or terrorism), Kexxel Group shall refund to each attendee its payment previously paid, minus a share of costs and expenses incurred, in full satisfaction of all liabilities of Organizer to Attendee. Kexxel Group reserves the right to cancel, re-name or re-locate the Event or change the dates on which it is held. If Kexxel Group changes the name of the event, relocates the event to another event facility within the same city, or changes the dates for the event to dates that are not more than 30 days later than the dates on which the Event originally was scheduled to be held, no refund will be due to attendee, but Kexxel Group shall assign to the attendee, in lieu of the original space/ seat, such other space as Kexxel Group deems appropriate. If Kexxel Group elects to cancel the Event other than for a reason previously described in this paragraph, Kexxel Group shall refund to each attendee its entire registration fee previously paid.

As such, Kexxel Group reserves the right to alter or modify the advertised speakers and/ or topics if necessary. Any substitution or alterations will be updated on our web page as soon as possible. Send 3 and get the 4th pax for free promotion is subject to Kexxel Group's discretion. In case of no show on the event day, the free attendee is assumed to have cancelled his/her seat and full payment is required as per invoiced. Due to limited event space, we strongly advise early registration to avoid disappointment.