Learning Outcomes

Business Strategy

Core & Specialized Credentials

International Certification Alliance

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LICENSING INFORMATION

The work in this document was facilitated by the International Certification Alliance (ICA) and done through the contributions of various experts and practitioners. These learning objectives are intended to help the growing Tomorrow-Ready™ community worldwide.

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HOW TO READ THIS DOCUMENT

This document outlines the learning outcomes that accredited member organizations must address to offer ICA's Business Strategy certification. To achieve the certification, a learner must complete the core credential plus at least two specialized credentials.

Each learning outcome (LO) follows a particular pattern, described below.

0.0 Learning Outcome Name

Additional Context, describing why this Learning Outcome is important or what it is intended to impart.

The learning outcome's purpose further describes what is expected to be imparted to the learner (e.g., a key point, framework, model, approach, technique, or skill).

CORE CREDENTIAL LEARNING OUTCOMES

Business Strategy Core

Business Strategy is an 8-hour Core Credential for professionals who need to understand how organizations choose where to compete, how to create more value than rivals, and how to turn that choice into a sustainable competitive advantage. Strategy is not the same as operational effectiveness: doing similar things better than competitors is valuable, but it rarely creates a lasting edge, because competitors can copy operational improvements. Real strategic advantage comes from making a distinct set of choices about how to create value for customers, employees, and suppliers that rivals find difficult to imitate.

1. Foundations of Strategic Value Creation

1.1 Strategy and Operational Effectiveness

Operational improvements are often visible and copyable, so organizations that compete only by doing similar activities better tend to converge. Strategy requires a distinct way to create and capture value.

Build learners' understanding of the difference between operational effectiveness and strategy as a source of lasting competitive advantage.

1.2 Value Capture and the Share Retained

An organization can create a great deal of value and keep very little of it. What it retains depends on what customers will pay compared with their alternatives, and on how much of the rest is claimed by others in the value chain.

Build learners' understanding that creating value and capturing value are different things. Develop the ability to judge how much of the value an organization creates it actually retains, and what determines that share.

1.3 Value Beyond the Customer

Strategy discussions usually stop at the customer. An organization also creates or destroys value for the employees who do the work and for the suppliers and partners it depends on, and those relationships shape the terms it can secure from them.

Develop learners' ability to analyze where an organization creates or destroys value for employees, suppliers, and partners, and how those relationships support or undermine its strategic position.

2. Analyzing Competitive Position

2.1 Industry Structure and Profit Potential

Industry profitability is determined by structural competitive forces that you can analyze and understand.

Build learners' ability to analyze the structural forces shaping an industry's attractiveness, using an established framework for competitive forces, so strategic choices are grounded in the industry's actual profit potential rather than assumptions about it.

2.2 Sources and Defensibility of Competitive Advantage

Not all competitive advantages last. Learning to evaluate what makes one defensible versus vulnerable is what separates temporary outperformance from sustainable advantage.

Develop learners' ability to judge whether a competitive advantage is durable or easily imitated. Cover how advantages such as scale, proprietary assets, switching costs, or accumulated capability are often harder to copy than temporary pricing or supplier benefits.

2.3 Strategic Positioning and Trade-offs

Organizations that try to be everything to everyone typically end up succeeding at nothing. Good strategic positioning means making a choice, accepting its trade-offs, and executing the positioning consistently.

Build learners' understanding that strategic positioning choices are about what to be known for and what NOT to be known for. Teach that every positioning choice involves trade-offs. Introduce common strategic positioning choices and the pros/cons of each such as cost, differentiation, broad market, niche focus, innovation leader, direct sales, or partnerships.

3. Choosing How to Compete

3.1 Business Model and Strategic Position

A strategic position becomes real through choices about offering, delivery, pricing, and cost structure. These business model elements need to reinforce the intended position rather than work against it.

Build learners' understanding of the business model as the practical translation of a strategic position.

3.2 Growth Strategy and Organizational Context

Growth strategies fail when they don't fit what an organization actually is and can do. Designing growth that aligns with competitive position, real capabilities, and sustainable risk tolerance is what separates ambitious plans from executable strategy.

Develop learners' ability to design a growth strategy, matching the growth path chosen to the organization's context, risk tolerance, and existing capabilities rather than defaulting to the most familiar option. Teach common growth strategies such as market penetration, product development, market development, and diversification.

3.3 Portfolio Resource Allocation

Organizations with multiple businesses or offerings need to decide where to invest, sustain, or exit. Misallocation can hide when stronger parts of the portfolio compensate for weaker strategic choices elsewhere.

Develop learners' ability to assess portfolio-level resource allocation against strategic potential. Introduce evidence of potential to consider such as market size and growth rate, competitive intensity, margins, and time horizon to payoff. Consider the cost of overinvesting in low potential areas and the cost of underinvesting in high potential areas.

4. Executing and Sustaining Strategy

4.1 Strategic Initiatives and Prioritization

Strategy becomes executable when organizations commit to a limited set of initiatives and explicitly deprioritize work that does not support the chosen position.

Develop learners' ability to translate strategic choices into a focused set of executable priorities. Strategic discipline requires not just choosing what to do, but choosing what NOT to do. Many organizations claim they're strategic but lack the discipline to stop initiatives that are no longer aligned with the core strategy.

4.2 Strategy Durability and Assumptions

Competitive advantage can erode as competitors, customers, technologies, or market conditions change. Strategy review therefore needs to test both current performance and whether the original assumptions still hold.

Develop learners' ability to assess whether a strategy remains defensible as conditions and underlying assumptions change. Cover types of assumptions made such as customer behavior, market structure, technology, regulation, or competitive landscape. Introduce types of signals that indicate an assumption is challenged.

SPECIALIZED CREDENTIAL LEARNING OUTCOMES

Competitive Analysis and Positioning

Competitive Analysis and Positioning is a 2-4 hour Specialized Credential for professionals who want to develop their ability to analyze an industry's competitive structure and translate that analysis into a defensible strategic position. Many strategic plans skip straight to ambition, entering a new market, launching a new offering, without first understanding the competitive forces that will determine whether that ambition can succeed.

1.1 Industry Structure and Strategic Viability

Competitor behavior is shaped by the structure of the industry around it. Concentration, buyer power, supplier power, substitutes, and entry barriers influence which strategic moves are likely to succeed.

Build learners' understanding of industry structure as distinct from the actions of individual competitors. Cover the risks and opportunities from non-industry players entering and competing for the same customer outcome.

2.1 Competitor Behavior and Capability

Competitors differ in what they are likely to do and what they are capable of doing.

Develop learners' ability to assess competitors separately on both likely intent and execution capability. Consider factors such as each competitor's resources, talent, technology, distribution, and strategic incentives individually.

3.1 Defensible Competitive Position

Easy-to-copy positions don't last. Sustainable competitive advantage requires deliberately designing defensibility into your position, not just hoping your execution stays ahead.

Develop learners' ability to design a competitive position with a clear mechanism that makes imitation difficult. Defensibility may come from scale, proprietary assets, switching costs, or accumulated capabilities.

4.1 Competitive Position Under Competitor Response

Competitive positions invite responses. Organizations that identify which competitor responses they're least prepared for can strengthen defensibility before competitors exploit the gap.

Develop learners' ability to assess whether a competitive position remains defensible under likely competitor responses. Build learners' understanding that competitive positions invite responses. The question isn't whether competitors will respond, but how. Introduce competitor responses such as copying advantage, attacking weaknesses, moving upmarket or downmarket, building alternative solutions, increasing spending, or engaging partners to neutralize advantage.

Business Model Design

Business Model Design is a 2-4 hour Specialized Credential for professionals who want to develop their ability to design how an organization creates, delivers, and captures value in practice, translating a strategic position into a working business model. A strategic position describes an intended direction while a business model describes the specific choices that make that direction operational; what is offered, how it reaches customers, how it is priced, what it costs to deliver.

1.1 The Elements of a Business Model

Strong business models have elements that reinforce each other. Weak models have elements pulling in different directions.

Build learners' understanding of the business model as an interdependent system that supports strategy. Teach the core elements of a business model such as what is offered, who receives it, how it is delivered, how value is priced, and what cost structure supports it. Introduce models, frameworks and/or canvases that help explore the business model.

2.1 Business Model Contradictions

Strategy only works when the business model reinforces it. Contradictions between strategy and business model erode both competitive position and business performance.

Develop learners' ability to diagnose where business model elements conflict with the strategic position they are meant to support. Help learners recognize common contradictions between business model elements and strategy and the impacts of those contradictions.

3.1 Business Model Design

Strategic position depends on a business model that works at a defined scale. Growing beyond that scale without redesigning the model destroys both the position and the advantage it was meant to create.

Develop learners' ability to design a business model whose core elements reinforce a chosen strategic position. Help learners' identify the scale at which the model works economically. Business models are optimized for a specific scale and beyond that scale, the model breaks because the cost structure no longer works or the strategic position becomes unsustainable.

4.1 Business Model Viability and Resilience

A coherent business model can still fail if its economics do not work at the intended scale or if a plausible market or competitive shift exposes a major vulnerability.

Develop learners' ability to judge whether a business model is financially viable and resilient enough to pursue.

Growth Strategy

Growth Strategy is a 2-4 hour Specialized Credential for professionals who want to develop their ability to evaluate and choose among the different paths an organization can pursue to grow, and to design a growth approach that fits its capabilities and risk tolerance. Growth is often treated as an unqualified goal rather than a strategic choice with real trade-offs between the risk, capability, and time each path requires.

1.1 Growth Paths and Trade-offs

Organizations often choose growth paths based on opportunity size without understanding the timeline.

Build learners' understanding of the trade-offs among common growth paths. Introduce common ways growth paths differ such as risk, capability requirements, and time to results. Cover common factors for timelines differences such as market maturity, capability overlap, execution complexity, capital requirements, and competitive urgency.

2.1 Growth Path Fit

A growth path that fits one organization may overwhelm another. Growth path fit is about whether this organization can execute it given who they are, what they have, and what they can tolerate.

Develop learners' ability to assess whether a growth path fits the organization's capabilities and risk tolerance. Teach categories of growth path fit such as capital, capabilities, market position, and risk tolerance.

3.1 Designing a Growth Approach

Growth that happens in stages succeeds more often than growth that tries to scale before proving fundamentals.

Build learners' understanding that staged growth reduces risk by proving assumptions and building capabilities before committing major resources. Teach that a two-stage approach isn't just "do something small, then scale". Each stage has specific objectives that build toward the next.

4.1 Growth Returns and Strategic Commitment

Growth initiatives can continue because stopping feels like failure even when returns no longer justify the original risk and resource commitment. Evaluation needs to compare current results with that starting point.

Develop learners' ability to assess whether a growth path still justifies the resources and risk originally committed. Teach how to distinguish between paths that are working but need adjustment, paths that need restructuring or timeline extension, and paths that should be exited.

Strategy Execution and Prioritization

Strategy Execution and Prioritization is a 2-4 hour Specialized Credential for professionals who want to develop their ability to translate a strategic choice into a prioritized set of initiatives and resource commitments that an organization can actually deliver. Most organizations have more strategic initiatives in motion than they have the capacity to execute well, and a strategy that is not translated into explicit priorities tends to be diluted across too many competing efforts.

1.1 Why Strategies Fail to Translate into Action

Every organization is vulnerable to common strategy execution failure patterns.

Build learners' ability to recognize execution failure patterns and see how organizational characteristics create vulnerability to specific ones. Teach common patterns such as too many competing priorities, declared priorities do not receive matching resources, or misunderstanding of the strategic goals.

2.1 Initiative Portfolio and Strategic Alignment

Organizations accumulate initiatives over time, including work tied to previous strategies or opportunistic additions. The result can be a portfolio that no longer reflects the current strategic choice.

Develop learners' ability to identify initiatives that no longer support the stated strategy. Cover why an initiative might no longer align with strategy such as strategy shifts but initiatives keep running, an initiative that was strategic becomes maintenance work, or market changes make an initiative less relevant.

3.1 Prioritizing Strategic Initiatives

Prioritization requires more than ranking initiatives. Genuine priorities receive explicit commitments of budget, people, and leadership attention, while other work is intentionally deprioritized.

Develop learners' ability to connect strategic priority choices with concrete resource commitments. Cover that strategic execution requires discipline on two fronts: choosing what to do and not doing what you're stopping, as well as committing realistic resources to make the top priorities succeed.

4.1 Strategic Execution and Intended Outcomes

Execution can look busy without producing the outcomes strategy was meant to achieve. Comparing results with intended outcomes helps identify drift before initiatives continue simply because they are already underway.

Develop learners' ability to assess execution against strategic outcomes rather than activity alone.

CX Metrics and ROI

CX Metrics and ROI is a 2-4 hour Specialized Credential for professionals who need to measure customer experience in a way that supports learning, improvement, and business decisions. The credential can stand alone or be combined with other customer-centricity credentials. It begins with a critical distinction: desired customer outcomes or experience aspirations—such as greater trust, lower effort, stronger loyalty, or greater delight—are not the same thing as the metrics used to assess them. NPS, CSAT, CES, retention, and other measures are indicators, not goals in themselves.

1.1 Outcomes, Measures, and the Limits of Scores

Organizations can confuse the metric with the outcome they actually care about. A target such as 'raise NPS' can become the goal, encouraging teams to optimize the score rather than improve trust, ease, loyalty, confidence, or another underlying customer outcome. Scores are useful signals, but they are proxies for something more important.

Build learners' ability to separate desired customer outcomes or experience aspirations from the measures used to assess them. Explore why metrics are indicators rather than goals, the risks of score fixation and gaming, and the value of combining perception, behavioral, operational, and business measures to understand whether the underlying experience is actually improving.

2.1 CX Metrics and Measurement Fit

Different measures answer different questions. Net Promoter Score (NPS), Customer Satisfaction (CSAT), Customer Effort Score (CES), retention, repeat behavior, complaints, service measures, and customer lifetime value can all be useful, but none is universally meaningful without a clear outcome or decision question.

Develop learners' ability to begin with the desired outcome or learning question and then select the smallest useful set of measures that provides a balanced view. Introduce common CX metrics and their strengths and limitations, and show how perception, behavior, operations, and business outcomes can be combined when one measure is insufficient.

3.1 CX Drivers, Business Impact, and ROI

Customer-experience measures create limited strategic value when they remain disconnected from the drivers of the experience and from business outcomes. At the same time, organizations can overclaim impact by assuming that a change in a score directly caused a financial result.

Develop learners' ability to connect experience drivers to customer outcomes, customer behavior, and business value. Explore relationships such as effort to adoption, trust to retention, or service failure to cost-to-serve; introduce customer lifetime value and other economic outcomes where relevant; and distinguish correlation from causation when estimating the ROI of an experience improvement.

4.1 Decision-Oriented CX Insight

CX reporting can become a collection of dashboards and score trends that tells leaders what changed without explaining why it matters or what should happen next. Measurement creates value when it supports a decision, investment, or improvement action.

Develop learners' ability to translate CX evidence into a concise decision narrative: what outcome matters, what the evidence shows, what appears to be driving it, how confident the organization should be, why it matters to the business, and what action or decision the evidence supports.

Customer-Centric Strategy

Customer-Centric Strategy is a 2-4 hour Specialized Credential for professionals who need to translate customer understanding into a clear customer-centered direction and a set of strategic choices. Rather than beginning with an internal organizational ambition, the work starts with the impact the organization wants to have on the lives, work, or outcomes of the customers it chooses to serve. Learners define a customer-centered vision, make explicit choices about priority customers and the value or experience to create for them, evaluate alternative ways to create that impact, and align organizational capabilities and investments around those choices. This is distinct from product strategy: the strategic choices may involve products, services, policies, channels, relationships, processes, ecosystems, or other ways of creating customer value.

1.1 Vision Through Customer Impact

Strategic visions are often written from the organization's point of view—growth, market leadership, transformation, or operational excellence. A customer-centered vision instead describes the meaningful impact the organization intends to have on the customers it serves and provides a durable direction for future choices.

Develop learners' ability to frame a strategic vision around the meaningful impact the organization wants to create for customers. Distinguish customer impact from internal organizational goals and from the metrics used to assess progress.

2.1 Priority Customers and Customer Value

Customer-centricity does not require treating every customer identically. Customers differ in needs, context, behaviors, potential value, and strategic importance, and the customers an organization should prioritize can change as its strategy and environment change.

Develop learners' ability to use customer insight and segmentation to make deliberate choices about which customers or segments to prioritize at a given point in time and what value, outcomes, or experience matter most for them. Introduce customer heterogeneity, needs, strategic importance, relationship potential, and customer economics as inputs to the choice.

3.1 Customer-Centric Strategic Choices

A customer-centered vision is not yet a strategy. Organizations can pursue the same customer impact through different combinations of products, services, policies, channels, processes, relationships, partnerships, and experiences. Strategy requires choosing among alternatives and deciding what not to pursue.

Develop learners' ability to compare alternative ways to create a defined customer impact and make an explicit strategic choice. Explore trade-offs using customer impact, differentiation, evidence, feasibility, economics, and organizational strengths, reinforcing that customer-centric strategy may span products, services, policies, channels, processes, relationships, or partnerships.

4.1 Organizational Alignment and Adaptation

Customer-centric strategies fail when the organization continues to allocate resources, make decisions, measure success, or operate in ways that conflict with the intended customer impact. They also become obsolete when changes in customer needs, technology, competition, or economics are treated as exceptions rather than new strategic evidence.

Develop learners' ability to identify the organizational change needed to support a customer-centric strategic choice. Explore capabilities, investments, decision criteria, cross-functional coordination, and measures that can reinforce the strategy, while introducing adaptation as a Tomorrow-Ready principle when new customer evidence materially changes the opportunity.

AI for Product Strategy

AI for Product Strategy is a 2-4 hour Specialized Credential for professionals who want to develop their ability to apply artificial intelligence tools to sharpen strategic product thinking. AI can accelerate market analysis, surface competitive signals, and support the generation and prioritization of product initiatives; but translating AI outputs into sound strategic decisions requires human judgment, contextual knowledge, and critical thinking that no tool can replace. This credential builds the practical capability to use AI as a strategic thinking partner while remaining clear-eyed about its limits.

1.1 AI-Assisted Market and Competitive Insight

AI tools can process large volumes of market and competitor data to surface patterns that inform strategic direction, but that analysis reflects the data it was given, not necessarily the full strategic picture.

Develop learners' ability to use AI for market intelligence as a starting point for strategic thinking. Explore synthesis across market and customer evidence, competitor moves, technology shifts, and internal performance, and distinguish useful signals from unsupported inference. Developing the critical human judgement needed to assess what AI analysis reveals, what it misses, and how to interpret and validate it.

2.1 AI-Assisted Strategic Options

AI can generate strategic product initiatives quickly, but volume is not the same as strategic quality. Its greater value is helping teams explore genuinely different options, challenge assumptions, and see how alternatives perform under different market or business scenarios.

Develop learners' ability to use AI as a strategic thinking partner to generate genuinely different product options, surface assumptions and risks, develop counterarguments, and explore scenarios rather than merely generate feature ideas. Develop critical human judgement to assess relevance to a defined customer problem, feasibility within organizational constraints, and alignment with business goals.

3.1 AI-Assisted Prioritization

Good prioritization decisions leverage both AI's analytical power and human wisdom about context, ethics, and organizational reality. Learning to intentionally design where AI informs and where human judgment decides is what enables better strategic choices.

Build learners' ability to design a decision process where AI enhances human judgment without replacing it. Help them understand that a good decision process clarifies what criteria matter, how AI will inform each criterion, where human judgment must step in, and how to know when to trust or question AI analysis. Evaluate options against customer outcomes, business impact, evidence, economics, feasibility, risk, and coherence from product vision through strategy to roadmap.

4.1 Communicating AI-Informed Product Strategy

A product strategy is a set of deliberate choices that must be communicable to stakeholders who will fund and act on it. AI can help synthesize evidence, tailor communication, and monitor new signals, but strategic coherence, accountability, and the decision to change direction remain human responsibilities.

Develop learners' ability to communicate an AI-informed strategy with clear separation between evidence, inference, and human choice, and to identify signals that should trigger strategic reassessment. Include key elements such as target market, strategic goals, success metrics, and AI-sourced benchmarks. Use AI to accelerate alternative explanations and stakeholder-specific communication without surrendering accountability.

Product Strategy and Roadmapping

Product Strategy and Roadmapping is a 2-4 hour Specialized Credential for professionals who want to develop their ability to translate product vision into a coherent strategic direction and a roadmap that guides decisions without constraining adaptability. Many product teams operate with roadmaps that are really feature release schedules, committing to specific outputs on specific dates while losing sight of the outcomes they were meant to achieve. This credential builds the capability to create and sustain product direction that is outcome-oriented, stakeholder-aligned, and resilient to change, with a consistent thread of strategic coherence running from vision through strategy to roadmap.

1.1 Translating Vision into Strategic Direction

Product vision is inspirational but vague. Strategic direction is what actually guides product decisions and aligns teams. Learning to translate vision into strategy turns aspirations into execution.

Build learners' ability to translate abstract product vision into concrete strategic direction. Help them understand that a vision is often inspirational but vague while strategic direction is specific and actionable. Clarify target customers or users, intended outcomes, value proposition or differentiation, strategic focus areas, and the assumptions that need to be validated.

2.1 Making Strategic Choices

Not everything can be a priority. Learning to compare strategic options and choose one is how teams build focus instead of spreading effort across competing requests

Develop learners' ability to compare strategic options and make explicit choices about where to focus and what not to pursue. Help them understand that strategic options are fundamentally different bets. Consider customer value, evidence, business impact, economics, feasibility, differentiation, strategic fit, and the learning value of a bet.

3.1 Building an Outcome-Oriented Roadmap

Roadmaps aren't just schedules. They're strategic narratives that explain what you're building, why, and what needs to hold true along the way.

Develop learners' ability to translate strategic direction into an outcome-oriented roadmap. Help them understand that a roadmap isn't a detailed task list. Explore roadmap formats, themes or bets, intended outcomes, sequencing logic, dependencies, levels of commitment, and how the roadmap can show where the team is investing to learn.

4.1 Keeping Strategy and Roadmap Aligned

A roadmap that never changes may create the appearance of predictability, but it can also become disconnected from the assumptions and strategic intent that originally shaped it.

Develop learners' ability to review and adapt roadmap direction while preserving coherence from vision to strategy to current priorities. Explore review cadence, evidence triggers, explicit assumptions, and how to communicate changes without treating the roadmap as a promise that must be defended.

Prioritization

Prioritization is a 2-4 hour Specialized Credential for professionals who want to develop their ability to make clear, defensible, value-based decisions about what to work on when capacity is limited and demand exceeds supply. Prioritization is one of the most frequently exercised and least formally developed skills in organizational life. Whether the context is a product backlog, a delivery queue, a portfolio of initiatives, or a team's weekly workload, the discipline of identifying what matters most and committing to a sequence is the same: understand what value means in this context, surface the trade-offs honestly, apply consistent criteria, and communicate the decision in a way that builds rather than erodes confidence.

1.1 Prioritization as a Value Judgment

Prioritization frameworks encode assumptions about what value means, whose needs matter, and which trade-offs are acceptable. They do not remove judgment from the decision.

Build learners' understanding of prioritization as a value-based discipline requiring explicit criteria and trade-offs. What counts as "value" at all (what gets attention), what factors are allowed to influence the decision (what is considered in the cost, etc), and whose needs get counted and by how much (who gets attention).

2.1 Value in Context

Executives, users, teams, and other stakeholders may define value differently. Prioritization becomes inconsistent when those differences are not addressed.

Develop learners' ability to surface competing definitions of value before prioritization. For example, an executive might define value primarily in terms of revenue or strategic positioning, a user might define it as whether the product actually solves their day-to-day problem, and a delivery team might define it as reducing the technical debt that's slowing every future decision down. None of these definitions is inherently more correct than the others. A shared basis for criteria might mean negotiating a small set of common dimensions, such as customer impact, revenue effect, and delivery risk, that each stakeholder's definition of value can be translated into and weighed against together.

3.1 Defensible Priorization

A strong prioritization approach makes value criteria and trade-offs visible. The result should be explainable to stakeholders even when they disagree with the prioritization.

Develop learners' ability to design and apply context-appropriate prioritization methods that produce transparent trade-offs. For example, a weighted scoring model that explicitly rates each item against criteria like customer impact, revenue, and effort makes the reasoning visible, so a stakeholder can see exactly why item A ranked above item B and can challenge a specific score rather than the decision as an opaque whole.

4.1 Prioritization Discipline Over Time

Prioritization discipline can erode as demand grows and stakeholder pressure increases.

Develop learners' ability to assess the conditions that sustain or weaken prioritization discipline. Structural and cultural conditions determine whether hard choices continue to be made consistently by leveraging a variety of prioritization practices. Introduce conditions that impact prioritization over time such as organizational growth, stakeholder pressure increases, the gap between demand and capacity widens, and the temptation to satisfy every request.

Portfolio and Investment Governance

Portfolio and Investment Governance is a 2-4 hour Specialized Credential for professionals who want to develop their ability to govern how organizations make, review, and adjust decisions about where to invest time, money, and capability. At the portfolio level, governance determines which work gets started, how resources are allocated across competing priorities, and when to persevere, pivot, or stop. Without deliberate portfolio governance, organizations default to whoever advocates loudest, perpetuating work that no longer serves strategy and leaving high-value opportunities unfunded.

1.1 Portfolio Governance and Strategic Value

Portfolio governance is more than project approval or budget control. It allocates finite organizational capacity toward work expected to create strategic value.

Build learners' understanding of portfolio governance as a strategic allocation mechanism rather than a gatekeeping process.

2.1 Portfolio Investment Decisions

Portfolio decisions involve competing priorities, limited capacity, incomplete information, political pressure, and time sensitivity. Without a structured approach, influence can outweigh strategic value.

Build learners' ability to approach portfolio investment decisions as a structured, evidence-based activity that accounts for strategic alignment, feasibility, capacity, and the cost of delay. Cover the risks of not having a structured approach to portfolio investment decisions.

3.1 Adaptive Portfolio Review

Annual portfolio reviews can be too slow for fast-changing environments. More frequent review allows organizations to continue, adjust, or stop work as strategic conditions change.

Develop learners' ability to create a portfolio review process that supports ongoing adjustment rather than periodic re-approval. Introduce the components of portfolio review processes such as cadence, criteria, and escalation paths.

4.1 Portfolio Governance Effectiveness

Organizations often measure project delivery without assessing whether portfolio governance allocated resources to the highest-value work. This allows weak prioritization systems to persist.

Develop learners' ability to assess whether portfolio governance connects investment decisions with strategic value. Introduce assessment criteria such as strategic alignment, prioritization bias, and resource allocation effectiveness. Discuss the discipline needed to stop funding portfolios that are no longer the highest priority.

Operating Model Design

Operating Model Design is a 2-4 hour Specialized Credential for professionals who want to translate strategy into the practical choices that make execution possible: value streams, capabilities, structures, processes, roles, decision rights, data, technology, locations, sourcing, measures, and governance. The credential reflects current demand for operating models that can support digital and AI-enabled work, ecosystem delivery, customer-centric value creation, and rapid strategic reprioritization.

1.1 Connecting Strategy to an Operating Model

Strategy doesn't specify how to operate. Organizations that deliberately design operating model choices execute better than those that let these decisions happen by accident or default.

Clarify the distinction between strategy, business model, structure, and operating model so learners can identify the operating choices still required. Operating models make choices about capabilities, processes, technology, accountability, location, and governance explicit. Cover the emerging choices needed in an AI-augmented workforce such as where human judgement and quality control sit in a process.

2.1 Operating Model Alignment

Strategy fails more often because operations can't support it than because the strategy itself is wrong. Learning to trace actual work flow and identify where operations diverge from strategy is how to fix execution before it derails.

Build learners' ability to see the operating model as a complete system and trace how work actually flows end-to-end. Cover how to connect execution problems to operating-model causes such as challenges across value streams, capabilities, processes, roles, data, technology, or governance.

3.1 Target Operating Model Options

Operating model design is about strategic choices, not universal best practices. Learning to identify which dimensions matter most for a defined strategy helps allocate transformation effort and resources effectively.

Develop learners' ability to create coherent operating model options that fit strategy and constraints, while prioritizing the dimensions most relevant to the context. Cover dimensions such as value streams, capabilities, structure, process, roles, decision rights, data, technology, location or sourcing, and measures.

4.1 Testing Readiness and Planning the Transition

Operating model designs fail not because they're bad designs, but because organizations implement them without readiness or dependencies in place. Learning to evaluate implementation readiness before committing to change prevents costly rollouts that collapse when reality hits.

Build learners' ability to assess whether an organization is actually ready to implement a proposed operating model testing both readiness and dependencies. Distinguish between a good operating model design and an organization capable of executing it. Consider factors such as required capabilities, data, technology, leadership capacity, workforce skills, investment, or change capacity. Build learners' ability to assess operating model feasibility and determine how implementation should be sequenced, piloted, or adapted.

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