
Chief Strategy Officer Course: Running the Strategy Office, Portfolio Choices and Board Reporting

14 – 18 June 2027
Geneva





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Programme Summary

Chief strategy officer practice is the subject of this one-week training course for chief strategy officers, heads of strategy and strategy office directors, ending in a strategy office operating plan for one organisation. Strategy teams are often asked to advise, plan, track and report at once, without a settled office design. The programme builds a method for setting up the office, shaping the portfolio, running the planning calendar, tracking initiatives and reporting to the board, applied to the participant's own organisation. Mars Training Centre UK delivers this programme on the chief strategy officer role to mixed-organisation cohorts.

The Business Case

When no one owns the planning cycle and the portfolio, strategy papers arrive late, competing projects draw on the same people and boards receive reports that cannot be compared from one quarter to the next. A defined strategy office gives the chief executive one view of choices, capacity and results.

- Decision Speed: Rises as choices reach the executive team in a standard format with options and trade-offs.
- Initiative Overlap: Falls as a single portfolio view exposes duplicated projects and shared capacity limits.
- Board Confidence: Rises as reports follow a fixed structure that shows progress against stated outcomes.

Principles and Evidence Base

- Office of Strategy Management: This concept links strategy formulation, planning and execution, and Sessions 1 and 3 use it to design the office and its calendar.
- Balanced Scorecard: Session 4 applies this performance framework to connect initiatives with measures the board reviews.
- Strategic portfolio thinking: Session 2 treats strategic choices as a portfolio to be ranked and rebalanced, not as a list of separate projects.

Intended Participants

- Strategy leaders who advise the chief executive on direction.
- Heads of strategy who run the planning cycle and own the strategy calendar.
- Strategy office directors who design the office and its operating rules.
- Transformation leaders who track initiatives against strategic outcomes.
- Corporate planners who prepare board papers on strategy.

Typical sectors include banking, energy, government entities and large diversified groups.



Learning Outcomes

1. Participants will be able to construct an operating design for a strategy office that states its mandate, services and limits.
2. Participants will be able to evaluate a set of strategic options and rank them into a portfolio with stated criteria.
3. Participants will be able to design a planning calendar that links strategy setting, budgeting and review dates.
4. Participants will be able to diagnose slipping initiatives from progress data and dependencies.
5. Participants will be able to prioritise measures for a board report and justify what is left out.
6. Participants will be able to justify strategy advice to the chief executive with evidence, options and risks.

Programme Structure

Day 1: Chief Strategy Officer Role and Strategy Office Design

What does the chief strategy officer own, and how is the office built to do it?

- Role Mandate Statement
- Strategy Office Service Catalogue
- Decision Rights Matrix
- Stakeholder Map for the Executive Team
- Office Operating Model Canvas

Day 2: Portfolio Choices

How are strategic bets compared, ranked and rebalanced?

- Strategic Options Register
- Portfolio Ranking Criteria
- Portfolio Balance Check
- Resource Capacity Overlay
- Stop and Start Decision Rules

Day 3: Planning Calendar

How do strategy setting, budgeting and review fit into one year?

- Annual Planning Calendar
- Strategy Refresh Trigger List
- Budget Alignment Checkpoints
- Executive Offsite Design
- Planning Paper Template



Day 4: Initiative Tracking and Board Reporting

How is progress measured, and what does the board need to see?

- Initiative Charter Sheet
- Dependency Map
- Milestone and Outcome Tracker
- Board Strategy Report Format
- Early Warning Indicators

Day 5: Applying the Tools to One Strategy Office

Do the design, portfolio, calendar and reporting tools form one working plan?

- Applying the Session 1 Decision Rights Matrix
- Using the Session 2 Portfolio Ranking Criteria
- Checking the Session 3 Annual Planning Calendar
- Running the Session 4 Board Strategy Report Format
- Completing the Strategy Office Operating Plan

Methodology

The programme uses a structured exercise method built on anonymised planning calendars, initiative registers and board packs from banking, energy and public settings. Participants work in small teams on a shared case, challenge each other's rankings and receive written facilitator feedback.

- Suggested activity: Ranking ten strategic options against agreed criteria and defending the cut line.
- Suggested activity: Rebuilding a late planning calendar around a fixed board date.
- Suggested activity: Rewriting a long progress update as a one-page board report.

Capstone Output

Each participant completes a strategy office operating plan for one organisation. It holds a role mandate, a decision rights matrix, a ranked portfolio, an annual planning calendar and a board report format. The plan is used at work to agree the office mandate and set the first planning cycle.

Frequently Asked Questions

Is the chief strategy officer course suitable for newly appointed strategy leads?

Yes. The chief strategy officer course assumes some exposure to planning and builds the office design, portfolio and reporting methods step by step.



Which models does the chief strategy officer course rest on?

The chief strategy officer course rests on the Office of Strategy Management concept, the Balanced Scorecard and portfolio thinking applied to strategic choices.

How is the plan from the chief strategy officer course used at work?

You use the operating plan to agree the office mandate with the chief executive, set the first planning cycle and structure board reporting.

How does the chief strategy officer course differ from a general strategic planning course?

The chief strategy officer course concerns the role and the office that runs planning, portfolio and reporting, while a general strategic planning course teaches how to write a strategy.