



**33RD STERLING
LEADERSHIP CONFERENCE**

MAY 27 - 30, 2025 // HYATT REGENCY, ORLANDO

STRATEGIC PLANNING CERTIFICATION TRACK

The Sterling Council is delighted to introduce a new certification track at the 2025 Sterling Conference. The Strategic Planning Track includes five workshops focusing on the stages of strategic planning. Each 90-minute session is presented by experts in their respective areas and includes “applied learning” best practices with a tangible “Takeaway” provided which to help you hardwire the workshop session learning. These experts come from a variety of backgrounds and industries.

You may attend any or all of these workshops. If you complete any six sessions, Sterling will provide you with a [Sterling Strategic Planning Certificate](#).

Wednesday, May 28th - 10:15 am – 11:45 am

Hey, We Wrote a Strategic Plan! Now What?

Bob Goehrig, Sterling Master Examiner

Budget Director, Pasco County Government, Retired

- Understand the importance of a strategic plan
- Learn how to transform your strategic plan into action
- Discuss different strategic management processes

Takeaway: 10 Tips for keeping your strategic plan on track

Wednesday, May 28th - 3:15 pm – 4:45 pm

Beyond the Retreat: Mastering Strategic Planning with a Seven-Phase Framework

Dr. Raina Knox, President/CEO

Erin McCoy, Director, Professional Services

Stratex Solutions

- Master the practical application of the innovative 7-phase strategic planning framework to fulfill integrated Baldrige criteria
- Explore dynamic techniques to actively engage stakeholders, conduct impactful organizational assessments, and craft actionable tactical plans
- Cultivate advanced competencies in strategic governance, effective performance monitoring, and continuous evaluation to drive organizational accountability and excellence.

Takeaway: Seven phase playbook with examples, resources and tools providing immediate guidance to effectively implement and manage strategic plans.

Thursday, May 29th – 11:00 am – 12:30 pm

Developing and Implementing Successful Action Plans

Bob Seemer, Chief Operating Officer

Electronic Training Solutions, Inc.

- Discuss the reasons why 70% of project action plans fail to meet expectations
- Review five high-impact techniques to improve the effectiveness of project action plans
- Describe how the high-impact techniques are applied to an actual project

Takeaway: Templates for the techniques

Friday, May 30th – 8:00 am – 9:30 am

Designing Strategic Planning for Strategic Execution in a Role Model Organization

Jeanellys Perez, Manager, Strategic Portfolio Management

Megan Andreis, Strategic Planner

Lee Health

- Identify key principles of systems thinking and their application to strategic planning
- Develop a structured framework for aligning strategic initiatives with execution
- Evaluate the impact of integrated planning on organizational outcomes

Takeaway: Participants will leave with a structured framework and tools to bridge the gap between strategic planning and execution, enhancing organizational efficiency and decision-making.

Friday, May 30th – 9:45 am – 11:15 am

Planning for Accountability

Denise Haynes, Managing Partner

Doug Serrano, Managing Partner

Quiet Excellence, LLC

- Describe the importance of using the strategic plan / action plans as a change driver
- Create “SMARTER” plans that drive organizational excellence
- Use “change the business / run the business / report the business” measures to create accountability (management by fact)

Takeaway: SMARTER plan and scorecard templates

ELEVATING PERFORMANCE EXCELLENCE



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