

ACCREDITATION PROGRAMS FOR BUSINESS STRATEGISTS

YEAR 2015 - 2016



MEMBERSHIP AND ACCREDITATION

Canadian Business Strategy Association (CBSA)

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The programs for accreditation have been reviewed and approved by the following:

- Canadian National Advisory Council for the Business Strategy Profession
- The Executive Team of the Canadian Business Strategy Association

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ACCREDITATION AND MEMBERSHIP PROGRAMS

Welcome to Canadian Business Strategy Association

What is business strategy?

Business strategy is the direction and scope that an organization chooses in order to:

- Articulate the short and long term direction a business will pursue and the steps it will take to achieve its goals;
- Achieve competitive advantage for the organization through its configuration and use of resources within a challenging and ever-changing business environment;
- Meet the needs of its current and future markets;
- Meet its stakeholder and shareholder expectations.

About Business strategy:

The historical development of strategic management has gone through many stages throughout the past century. Influential forces such as the marketing revolution, the Japanese challenge, the drive towards a global economy, technological advances and knowledge driven strategies have helped grow and shape the business strategy profession to what it is today.

The Canadian Business Strategy Association has recognized these factors and their impact on the development of the Business Strategy Profession. The CBSA uses a knowledge-based approach that will contribute to the advancement of the contemporary Business Strategy Profession.

About CBSA:

The Canadian Business Strategy Association (CBSA) is a not-for-profit professional organization formed with the mandate of bringing together business strategists under a cohesive community in order to facilitate standardization, advancement and communication within the Business Strategy Profession.

CBSA Goals:

The CBSA is dedicated to executing the following Goals:

- Provide a forum for Business Strategist professionals;
- Facilitate ongoing research within the Business Strategy Profession;
- Empower Business Strategists through knowledge;
- Provide accreditation programs for professional strategists;
- Implement best practices amongst Business Strategy professionals.

CANADIAN BUSINESS STRATEGY ASSOCIATION

MEMBERSHIP AND ACCREDITATION

Membership with the Canadian Business Strategy Association will provide you with the resources, tools and connections that will enhance your strategic thinking, planning and decisions. As a member you will have access to Business Strategy intelligence and the opportunity to share expertise with others engaged in the strategic process. Whether it's through the networks, events or insights gained, a CBSA membership can provide relevant advice and support throughout your career.

This brochure is intended to give applicants information on CBSA's membership categories, the requirements and the application process for membership. Each membership grade or designation is awarded on a combination of experience and qualifications. As members progress in their careers, they can apply for membership to the appropriate category.

POTENTIAL MEMBERS OF THE CBSA

- **Organizational Leaders, managers and executives** who are responsible for the design, planning and execution of business strategy in for-profit, government and non-profit sectors. They include top level managers to those leading a division, department, or team that has a critical strategy component.
- **Strategy Consultants, Trainers and Facilitators** who provide content and process expertise for setting and implementing strategic plans. They are professionals engaged in activities related to the advising and coaching of teams, committees or individuals in charge of formulating and implementing strategy.
- **Academics: professors, students, researchers and authors** engaged in the creation and transfer of new knowledge in the field of business strategy.

MEMBERSHIP CATEGORIES

The CBSA provides individuals the opportunity for professional development and accreditation through the following membership categories:

1. GENERAL MEMBERS

General membership is open to those individuals who are interested in organizational and business strategy and would like to further advance their knowledge and skills. All members must observe the code of professional ethical conduct of the CBSA.

2. STUDENT MEMBERS (ASSOCIATE STRATEGIST)

Applicants for student membership must show proof of enrollment in a full-time business studies related degree or diploma in a recognized university or college. Student membership is applicable for a maximum of 4 years which may be extended for an additional two years with the approval of the Accreditation Committee. This period is to enable members to build professional experience.

Student members can request to be considered for the next suitable category as soon as it is applicable. All student members must observe the code of professional ethical conduct of the CBSA.

3. CHARTERED MEMBER CATEGORIES

- a. Chartered Business Strategist (CBS)
- b. Executive Chartered Business Strategist (Executive CBS)
- c. Chartered Business Strategy Facilitator (CBSF)
- d. Chartered Business Strategy Educator (CBSE)

A. Chartered Business Strategist (CBS)

Applicants for the designation of Chartered Business Strategists are generally employed in middle or lower level management positions and are relatively new to the field of strategic management. Their role may be related more to the management and processing of information used in the strategic management process rather than the management or execution of the intended strategy.

Chartered Business Strategists will:

1. Have a degree from an accredited educational institution with at least two courses related to the areas of strategic management, planning or implementation, strategic policy, international or global business management with a minimum GPA of 4 points over 5 or grade B.
2. Have professional experience of at least 3 years involving coordination, collaboration or analysis in organizational strategic decision making process. In doing so, they would have performed some or all of these activities:
 - *Prepares reports and recommendations on feasibility, cost effectiveness or regulatory conformance of long- or short-term strategic plans, projects or proposals and ongoing programs to achieve growth and profitability objectives;*
 - *Conducts field (industry, markets and competitiveness) investigations, economic or public opinion surveys, demographic studies, or other appropriate research to gather required information;*
 - *Coordinates with top management or strategic planning committees in the development and formulation of strategic plans and directions and assists in determining broad guidelines for projects.*
 - *Reviews and evaluates materials, such as environmental impact statements, construction specifications, or budget or staffing estimates to determine additional data requirements;*
 - *Organizes and analyzes data from different sources, using statistical methods to ensure validity of results;*
 - *Evaluates information to determine feasibility of proposals or to identify factors requiring amendment;*
 - *Manages or processes socioeconomic, industry, market, environmental, or regulatory data for use by planning and administrative personnel in government and private sectors;*
 - *Reviews plans and proposals submitted by governmental or private planning commissions, committees or private organizations to assist in the formulation of overall strategic plans. May participate in merger and acquisition projects performing the above functions.*

Potential candidates may occupy positions that include the following: Strategic Planning Analyst/Manager, Strategy analyst, Strategic Initiative Coordinator/Manager.

3. Observe the code of professional ethical conduct of the CBSA.

Details of relevant experience can be provided through CV/resume and by organizational communication instruments in which the applicant's participation in one or more activities is specifically mentioned or by presenting letters of references in which a superior attests his or her participation in these activities. Applicants must provide at least one employment reference who can attest their experience, skills and qualifications.

B. Executive Chartered Business Strategist (Executive CBS)

Applicants for the designation of the Executive Chartered Business Strategist will have extensive strategic management experience at medium and top levels within the organizational structure. They have decision making power and responsibility for achieving business objectives. They may be responsible for organizational resources, processes or transformation and change within the organization.

Executive Chartered Business Strategists will:

1. Have an MBA, IMBA, EMBA or a graduate degree from an accredited educational institution with at least two courses related to the areas of strategic management, planning or implementation, strategic policy, international or global business management.
2. Have professional experience of at least 5 years involving the planning, management and implementation of organizational strategic plans. In doing so, they would have performed some or all of these activities:
 - *Manages the analysis, planning, research and development of organizational objectives and strategic plans;*
 - *Identifies company strengths and weaknesses in order to achieve business opportunities, growth, and financial profitability via acquisitions, mergers, and/or divestitures;*
 - *Evaluates, plans, and develops organizational policies and goals, growth and structural objectives in collaboration with other top management members;*
 - *Oversees and participates in development and research activities that builds on organizational strengths and core competencies, identifying potential new markets and business opportunities and increasing market share and competitiveness;*
 - *Coordinates activities of department/s to achieve operational efficiency and economy and to ensure consistency in long-term planning. Confers with department staff and reviews activity and operating reports. May be responsible for prices, marketing, advertising and profitability of specific products;*

- *Prepares, analyzes, or monitors budget requests to identify areas in which reductions can be made, and allocates operating budgets.*
- *Reviews organizational or departmental activity and operating reports;*
- *Promotes and assumes representation of the organization in industry trade associations, federations and such institutions;*
- *Typically reports to the Director, Head of Business or CEO and has managers, supervisors and/or analysts reporting to this position.*

Potential candidates may occupy positions that include the following: Senior Strategic Planning manager/director, Senior Strategy Manager, Long-range planning manager/director, Head of Strategy, Head of Strategic Planning.

3. Observe the code of professional ethical conduct of the CBSA.

Details of relevant experience can be provided through CV/resume and by organizational communication instruments in which participation in one or more activities is specifically mentioned, or through letters of references attesting such activities.

C. Chartered Business Strategy Facilitator (CBSF)

Applicants for the designation of Chartered Business Strategy Facilitator are professionals who provide content and process expertise for setting and implementing strategic plans. They are engaged in coaching/advising/consultancy services for teams, committees or individuals in charge of formulating and implementing strategy.

Chartered Business Strategy Facilitators will:

1. Have a degree, ideally a BA, IBA, BAcc, MBA, IMBA from an accredited educational institution with at least two courses related to the areas of strategic management, planning or implementation, strategic policy, international or global business management.
2. Have formal education or training in facilitating or coaching teams from an accredited institution, organization or recognized consulting firm.
3. Have professional experience of at least 5 years performing some or all of these activities:
 - *Facilitates, supports and influences the development of business, corporate or functional level strategy, in line with the organization's mission and objectives. Would have direct responsibilities over members involved in the process or indirectly as an advisor or external consultant.*
 - Provides analysis and insights to senior leadership or strategy teams based on internal findings and external research.

- *Manages, coordinates and organizes, directly or indirectly, the planning of Strategic Off-sites for the senior management team at the business unit, divisional or corporate level. Determines content and facilitates breakouts as required for Strategic Off-sites within the business units, corporate or functional levels within an organization.*
- *Supports the operationalization of strategy including the development and ongoing execution of strategic roadmaps and the definition and prioritization of strategic initiative projects.*
- *Proposes, presents or reports, directly or indirectly, the development of the customer value proposition.*
- *Proposes and reports on key performance indicators (KPIs) to assess strategy execution and determines metrics that will effectively measure the execution of the organization's strategic plan.*
- *Analyzes and reports on internal and external benchmarking from own or external sources.*
- *Prepares, directly or indirectly, financial and economic models to evaluate future scenarios, strategic risk or other strategic variables.*
- *Identifies and participates in selecting targets for M&A, alliance partners, joint – ventures, due diligence and preparing legal agreements and contracts, directly or through third party contractors.*
- *Identifies key trends and provides recommendations on opportunities/issues as appropriate, including but not limited to statistical and economic analysis and evaluation of competences or key success factors.*
- *Develops cases, presentations and other communication to support management decisions, develops the internal identity of the management team, and enhances investor relations and other key business forums.*
- *Collaborates to streamline communications of organization's strategies and strategic initiative projects and reporting tools including newsletters.*

Potential candidates may occupy positions that include the following: Principal Strategy Officer, Strategic Planning Officer/ Consultant/Advisor, Strategy Development Consultant/Advisor, Director of Strategic Planning.

4. Have professional experience of at least 10 years in an advisory or consulting capacity to business strategy professionals for the planning, implementation or review of strategic decisions.
5. Observe the code of professional ethical conduct of the CBSA.

Details of relevant experience can be provided through CV/resume and by organizational communication instruments in which participation in one or more activities is specifically mentioned, or through letters of references attesting such activities.

D. Chartered Business Strategy Educator (CBSE)

Applicants for the designation of Certified Strategy Educator are academics and researchers engaged in the creation and transfer of new knowledge in the field of business strategy.

Chartered Business Strategy Educators will:

1. Have an MBA, IMBA, EMBA, Ph. D. in administration or business related area, with at least two courses and one advanced course or seminar related to the areas of strategic management, planning or implementation, strategic policy, international or global business management.
2. Have teaching or training experience in the field of strategic management, international business management, policy or other related areas in the last 4 years, or equivalent demonstrable experience in providing training workshops or activities related to the strategic decision making process. Presentations in conferences or keynote addresses will be considered equivalent to those mentioned before, but not accepted as the only means of proof of such experience.
3. Have published in peer reviewed, practitioner-oriented or specialized publications.
4. Observe the code of professional ethical conduct of the CBSA.

Details of relevant experience can be provided through CV/resume and by institutional communication instruments in which their participation in one or more activities is specifically mentioned, or through letters of references attesting such activities.

Note: *If a candidate cannot fulfill all the stated requirements for a particular Chartered membership status, the Accreditation Committee may consider special circumstances on request. If this is not possible the candidate has the option of attempting the accreditation exam which will be based on the “CBSA Body of Knowledge”. The examination is intended to replace the requirements of a higher education degree in the field. The Accreditation Committee will define the conditions for this examination to be administered to candidates.*

APPLICATION AND REVIEW PROCESS FOR MEMBERSHIP

All candidates must prepare a portfolio or file showing proof of requirements indicated for the membership category selected. The portfolio should be sent to the CBSA together with a cover letter requesting membership to a specific category and supporting details. The letter must be addressed to the Accreditation Committee.

Candidates will be informed in writing of the Committee's decision. If the Committee rejects the application, it may recommend another membership category. The candidate, in this case will receive a written communication from CBSA suggesting the change of membership. The change requires a formal request in writing from the applicant to be re-considered.

Additional notes:

1. Members of the CBSA are required to pay an annual membership fee. Accreditation designations will remain valid if the member continues to have his or her membership in good standing. Certified members will receive an annual accreditation certificate and a membership card.
2. Official languages for the CBSA and the accreditation process are English and French.
3. Documents in other languages must be translated by the applicant through the use of certified translators in the country of origin and certified by a Public Notary, certifying that the copy and translation maintain accuracy with the original document.
4. Degrees awarded by non-Canadian universities will be accepted as valid if the educational institution is one that is certified by an international accrediting body.