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COURSE BROCHURE

Advanced Corporate Portfolio and Business Unit Strategy Training Course

16 – 27 May 2027
Istanbul

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Registered in the United Kingdom and Saudi Arabia

Advanced Corporate Portfolio and Business Unit Strategy Training Course

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Corporate Portfolio and Business Unit Strategy is an advanced 2-week training course for business unit heads, division general managers and corporate development leads who must align unit strategies with group portfolio choices, producing a Business Unit Strategy Alignment Case for their corporate centre. Multi-business groups now reshape portfolios faster and fund units more selectively. Jupiter Prime Training runs this course for leaders who sit between the corporate centre and the market.

Why Corporate Portfolio and Business Unit Strategy Matters Now

Three pressures shape corporate portfolio and business unit strategy today: boards and investors who question whether diversified groups add value beyond what units could achieve alone, tighter capital that forces units to compete for investment and faster market shifts that change each unit's role. Groups that manage this link well allocate capital to the right units and exploit real synergies; groups that manage it poorly cross-subsidise weak units and smother strong ones. The course connects portfolio logic to the Balanced Scorecard BSC of Kaplan and Norton, the Nine Steps to Success approach of the Balanced Scorecard Institute and ISO 9004:2018 guidance on sustained success.

Who Gains Most from Corporate Portfolio and Business Unit Strategy

- Business unit heads who own a unit's competitive strategy
- Division general managers who balance several units' claims on shared resources
- Corporate development leads who assess acquisitions, divestments and portfolio balance
- Group strategy and planning heads who run the review cycle between centre and units
- Finance leaders of units who prepare investment cases and performance contracts

A group that sends a corporate strategy lead together with two or three unit heads gains most, because centre and units can agree one portfolio language and one capital logic.

Corporate Portfolio and Business Unit Strategy Capabilities

Participants learn to argue a unit's strategy in the terms the corporate centre uses to judge it.

- Assess a unit's portfolio position with growth-share and attractiveness-strength matrices — corporate centres assigning portfolio roles
- Apply the parenting advantage test to a unit and its owner — boards weighing retain, fix or exit choices
- Build a business unit competitive strategy consistent with group themes — unit leadership teams setting direction
- Calculate investment cases with risk-adjusted hurdle rates — capital allocation committees funding units
- Design synergy and shared-services arrangements with clear service terms — division heads resolving cross-unit tensions
- Specify a performance contract linked to a Balanced Scorecard cascade — executives agreeing unit targets and autonomy

Key Corporate Portfolio and Business Unit Strategy Terms

- Corporate strategy — choices about which businesses a group owns and how the centre adds value.
- Business unit strategy — the choices a single unit makes about markets, customers and competitive advantage.
- Parenting advantage — the extra value a corporate owner creates for a unit compared with any other possible owner.
- Portfolio matrix — a grid positioning units by market attractiveness and competitive strength to guide investment roles.
- Synergy — value created when units share resources, capabilities or customers that neither achieves alone.
- Performance contract — an agreement between centre and unit on targets, resources, autonomy and review terms.

Corporate Portfolio and Business Unit Strategy Day by Day

Day 1: Two Levels of Strategy

- Corporate Versus Business Unit Strategy — Separating Where to Play From How to Win
- Multi-Business Organisation Structures — Holding, Operating and Hybrid Centre Models
- Corporate Centre Value Diagnosis — Testing Whether the Centre Adds or Destroys Value
- Unit Strategic Mandate Mapping — Clarifying Each Unit's Role in the Portfolio
- Strategic Planning Cycle Interfaces — Where Unit Plans Meet Corporate Review

Day 2: Corporate Parenting Logic

- Parenting Advantage Test — Judging Whether the Owner Is the Natural Owner
- Heartland, Edge and Ballast Units — Classifying Fit With Parent Capabilities
- Value Creation Levers of the Centre — Linkage, Stand-Alone Influence and Central Services
- Parenting Style Choices — Strategic Planning, Strategic Control or Financial Control
- Value Destruction Risks — Recognising Over-Management and Misplaced Intervention

Day 3: Portfolio Assessment Methods

- Growth-Share Portfolio Matrix — Positioning Units by Market Growth and Relative Share
- Industry Attractiveness and Competitive Strength Grid — Weighing Multi-Factor Position
- Portfolio Balance Analysis — Mixing Cash Generators, Builders and Options
- Unit Lifecycle Mapping — Matching Strategic Posture to Maturity Stage
- Portfolio Role Assignment — Grow, Sustain, Fix or Exit Decisions

Day 4: Business Unit Competitive Strategy

- Unit Environmental Scanning — PESTEL and Five-Forces Lens at Unit Level
- Competitive Positioning Choices — Cost, Differentiation and Focus Postures
- SWOT to Strategic Options — Converting Unit Diagnosis Into Alternatives
- Customer and Segment Prioritisation — Concentrating Unit Resources Where It Wins
- Unit Strategy Statement — Objectives, Scope and Advantage in One Page

Day 5: Capital Allocation Between Units

- Capital Allocation Principles — Funding Strategy Rather Than Last Year's Budget
- Unit Investment Case Standards — Return, Risk and Strategic Fit Criteria
- Hurdle Rates and Risk Adjustment — Comparing Units With Different Risk Profiles
- Resource Reallocation Triggers — Moving Capital Away From Underperforming Units
- Capital Allocation Committee Dynamics — Preparing Units for Competitive Funding Rounds

Day 6: Synergy and Shared Services

- Synergy Types — Cost, Revenue, Capability and Knowledge Synergies Between Units
- Synergy Business Case — Quantifying Benefits Against Coordination Costs
- Shared Services Design Choices — Centralise, Federate or Leave in Units
- Service Level Agreements Between Centre and Units — Pricing and Accountability Terms
- Transfer Pricing and Internal Markets — Resolving Cross-Unit Trading Tensions

Day 7: Portfolio Moves

- Acquisition Fit Screening — Testing Targets Against Parenting Advantage
- Divestment and Carve-Out Logic — Deciding When a Unit Is Worth More Elsewhere
- Alliances and Joint Ventures — Extending Units Without Full Ownership
- Post-Deal Integration Strategy — Choosing Absorption, Preservation or Symbiosis
- Portfolio Scenario Testing — Stress-Testing the Mix Under Plausible Futures

Day 8: Balanced Scorecard Linkage and Unit Performance Contracts

- Corporate Strategy Map — Showing Portfolio Themes Across Four Perspectives
- Balanced Scorecard Cascade to Units — Aligning Unit Objectives With Corporate Themes
- Business Unit Performance Contracts — Agreeing Targets, Resources and Autonomy
- Nine Steps to Success Alignment Steps — Sequencing Scorecard Development in Units
- Unit Incentive Alignment — Linking Leadership Rewards to Portfolio Outcomes

Day 9: Corporate-Unit Dialogue and Review

- Strategy Review Calendar — Synchronising Unit Plans With Corporate Decisions
- Challenge Session Design — Structuring Corporate Questioning of Unit Strategies
- Strategy Performance Reviews — Reading Unit Scorecards for Portfolio Signals
- Escalation and Autonomy Boundaries — Defining Decision Rights Between Centre and Units
- ISO 9004 Self-Assessment — Gauging Organisational Maturity Across Units

Day 10: Practising the Business Unit Strategy Alignment Case

- Unit Portfolio Position Review — Testing Matrix Placement With Fellow Participants
- Parenting Fit and Synergy Challenge — Defending the Unit's Value to the Group
- Capital Request Rehearsal — Presenting the Investment Case to a Mock Committee
- Performance Contract Negotiation — Agreeing Scorecard Targets and Autonomy Terms
- Business Unit Strategy Alignment Case Completion — Finalising Position, Strategy, Capital Ask and Contract

Applying Corporate Portfolio and Business Unit Strategy After the Course

- Place each unit of the division on a portfolio matrix and test the result with the group strategy office before the next planning round.
- Draft a unit performance contract linking scorecard targets to resources and autonomy, and discuss it with the corporate centre.

Corporate Portfolio and Business Unit Strategy Questions FAQ

What is corporate portfolio and business unit strategy and why does it matter now?

Corporate portfolio and business unit strategy links group choices about which businesses to own and fund with each unit's plan to compete. It matters now because investors question diversified groups and capital is allocated more selectively between units.

Which roles gain most from corporate portfolio and business unit strategy training?

Business unit heads, division general managers, corporate development leads, group strategy heads and unit finance leaders gain most. You benefit most if you defend a unit's plan to the group or decide how capital moves between units.

How does corporate portfolio and business unit strategy differ from a chief strategy officer course?

Corporate portfolio and business unit strategy works from the unit head's seat, aligning one unit with group portfolio choices. A chief strategy officer course centres on running the enterprise strategy function.

What do you bring back from corporate portfolio and business unit strategy training?

You bring back an alignment case covering your unit's portfolio position, parenting fit, competitive strategy, capital request and draft performance contract.

Corporate Portfolio and Business Unit Strategy: The Way Forward

The Business Unit Strategy Alignment Case first informs the corporate centre's decision on the unit's portfolio role and funding level. Unit heads, division managers and corporate development leads use it to frame planning discussions. After the first funding round, revisit the parenting fit and synergy assumptions, because the centre's real behaviour often differs from its stated portfolio logic.