



Tuck **Executive Education** at Dartmouth

U.S. Small Business Administration



TUCK SCHOOL OF BUSINESS AT DARTMOUTH
in collaboration with
SMALL BUSINESS ADMINISTRATION and the
OFFICE OF INDIAN ENERGY AND ECONOMIC DEVELOPMENT,
U.S. DEPARTMENT OF THE INTERIOR

STRATEGIC RETREAT FOR
NATIVE AMERICAN VETERAN OWNED BUSINESSES
Gila River Reservation (Phoenix), Arizona September 14-16

The Office of Native American Affairs, SBA, and the Office of Indian Energy and Economic Development (DOI) are offering the opportunity for a select set of Native American/Alaska Native Veteran –owned businesses from all over the country to participate in a strategic retreat/intensive learning experience. Each Native Veteran-owned business will send its top-management group—accompanied, as appropriate, by key managers, board-level overseers, economic development officers, etc. *There is no charge for the program*; participants must pay for their own travel, lodging and meals.

The strategic retreat format will feature learning from Tuck School’s professors, followed by application of the learning to the business. The tailored learning experience will update leaders’ knowledge and skills, to understand how their business can be improved, diversified, and positioned for the future. The business leadership group will be guided towards agreement on a course of action to achieve optimum long term results.

Here’s what the leadership team will get from participating in the program:

- A three-day top-management development program tailored to Native businesses
- A strategic retreat to gain consensus on strategic direction
- Self-diagnosis of the business’s strengths and weaknesses
- Training in cutting-edge business thinking (there are *no pre-requisites*)
- A certificate from Dartmouth’s Tuck School of Business (rated the nation’s Number One business school by *The Wall Street Journal*).

The three-day program combines the best features of a strategic planning retreat, a tailored executive development program, and coaching by leading subject-matter experts. There will be a single case study for the three days—their own businesses. The outcome will be an understanding of the improvements needed in the business, a strategic plan for achieving and sustaining competitive advantage within their chosen industries, and an explicit To-Do list that the leadership group has committed to implement.

Sign up by contacting Rebecca Naragon at Rebecca.naragon@bia.gov or on (202) 208-4401. Hotel and Program site is the Wild Horse Pass Hotel and Casino, 5040 Wild Horse Pass Blvd., Chandler, AZ. 85226. Reservations for rooms at \$99 can be made by calling 1-800-946-4452. Name of room block: Department of the Interior.

WHO SHOULD ATTEND?

The program is designed to accelerate the progress of high-potential Native-owned businesses. The leadership group typically includes the chief executive officer, the chief operating officer, the chief financial officer, the head of sales, etc. They can bring their key managers, so that everyone who is involved in implementing the strategy is “on the same page.” In the case of tribally-owned businesses, we’ve found it invaluable to have members of the governing body attend, too, such as board members, Chiefs, Economic Development directors, or Tribal Council members. Groups of 3-5 people are typical, but it could be reasonable to have as many as 12 people attending from a tribe. The off-site strategic retreat offers an opportunity to gain consensus on a visionary course of action.

SAMPLE PROGRAM FORMAT

TUESDAY, SEPTEMBER 14

8:00-8:30	Introductions
8:30-10:00	Development and Refinement of Business Strategy
10:00-10:15	Coffee Break
10:15-12:00	Top Management Team (TMT) meeting to agree on company strategy
12:00-1:00	Lunch Break
1:00-2:15	Effective Strategy Implementation
2:15-2:30	Refreshment Break
2:30-4:00	TMT private meetings to improve strategy implementation
4:00-4:15	Refreshment Break
4:15-5:00	General discussion of strategy implementation challenges
Evening	Dinner on own, then preparation for next day’s learning experiences

WEDNESDAY, SEPTEMBER 15

8:00-10:15	Overview of Income Statement, Balance Sheet, and Statement of Cash Flows
10:15-10:30	Coffee Break
10:30-11:45	Overview of Income Statement, Balance Sheet, and Statement of Cash Flows (continued)
11:45-12:45	Lunch
12:45-2:45	Financial Statement Analysis
2:45-3:00	Coffee break
3:00-4:00	Analyzing your business
4:00-5:30	Information for decision-making and Break-even analysis

THURSDAY, SEPTEMBER 16

7:00-8:00	Breakfast
8:00-10:00	Managing the Growing Enterprise
10:00-10:15	Coffee Break
10:15-12:00	TMT meetings to assess current managerial approach
12:00-1:00	Working lunch: Develop strategy for running simulated business
1:00-2:00	Governance of the Enterprise
2:00-4:00	Strategic planning by TMT
4:00-4:30	Program Synthesis and Graduation Ceremony

LEONARD GREENHALGH, PhD

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Len Greenhalgh is The Tuck School's Director of Native American Business programs as well as Professor of Management. He also holds an appointment at Oxford University. Len comes from a practitioner background that includes managing purchasing in a multinational corporation, founding and running two small corporations, and management consulting. Born and raised in Great Britain, and educated in the United States, he received a Ph.D. from Cornell University, building on an undergraduate background in engineering and science, and an MBA.

He has been at the Tuck School since 1978, and has also taught at Stanford University, Cornell University, and MIT. He ran the Tuck/Oxford Business Bridge Programme at Oxford University from 1997-2000. He has done executive education in conjunction with Dartmouth, Stanford, Oxford, London Business School, Cornell, University of North Carolina, and Duke.

In addition to MBA teaching, he has done a considerable amount of executive education, research, and consulting, involving such organizations as ABB; Accenture; AGT/Choctaw; Alaska Investnet; Anthem; Baxter Healthcare; Beth Israel Hospital; BlueCross-BlueShield; Boeing; Boston Children's Hospital; Capcom; The Cherokee Nation; Chiron; Clark Construction; Coca-Cola; Constellation Brands; The Conservation Fund; DaimlerChrysler; Dartmouth-Hitchcock Medical Center; DEC; Deutsche Bank; Dynavax; Ericsson; Ernst & Young; European Aerospace, Defence and Space Co.; Ford; The Gap; General Electric; General Motors; Goldman Sachs; GTE; Harnischfeger; Harris Corporation; Harvey Hubbel; Hasbro; Henry Crown Industries; Hewlett-Packard; Hoechst; IBM; ITT; Jaguar; Koç Holdings; Johnson & Johnson; Lafarge; LG Electronics; MagRabbit; MBNA; Merrill-Lynch; Miles Pharmaceuticals; NASA; The Nature Conservancy; NEC; Nestlé; Nissho Iwai; Rand Corporation; Raytheon; Rolls-Royce; Siemens; Simon Pearce Glass; Smith-Barney; Sterling Pharmaceuticals; Syntex; Timken Aerospace; Toyota; Travelers; UNICEF; United Technologies; US Air Force; US Dept. of Agriculture; Minority Business Development Agency, US Dept. of Commerce; Office of Indian Energy and Economic Development US Dept. of the Interior; US Postal Service; Varian; Wachovia Bank; Warner-Lambert; The White House; and Williams Holdings UK. He has traveled in more than 40 countries. International assignments include the UK, Australia, Germany, Italy, Turkey, Brazil, Puerto Rico, Spain, Switzerland, and Canada.

His areas of expertise include (1) strategy and strategy implementation; (2) managing strategic relationships (3) entrepreneurial business; (4) Native American business enterprises; and (5) effects of globalization and changing demographics on

business. He is the author of *Managing Strategic Relationships*, and co-author with Jim Lowry of *Minority Business Success* (forthcoming). He has also written more than 130 articles, book chapters, monographs, cases, and professional papers. His work in helping minority and Native American businesses is reflected in the Lifetime Achievement Award conferred by the Minority Business Development Agency, US Department of Commerce; Tuck's inclusion in the Minority Business Hall of Fame; and his listing among 100 Men in Supplier Diversity.

Phillip Stocken, Ph.D., Chartered Accountant (SA)
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Professor Phillip Stocken specializes in accounting and business analysis, with experience in Native American- and minority-owned businesses. His current interest include the development of strategic financial performance measures key to a firm's success; the strategic communication and interpretation of financial statement information; accounting valuation rules; credible communication of information; and earnings management

He has been awarded the following degrees: BCom (Honors) in the first class, University of the Witwatersrand, 1988; MCom, University of Witwatersrand, 1995; PhD, Pennsylvania State University, 1998.

He teaches accounting and financial management, analysis, and reporting at Tuck, in both executive education programs and MBA classes. He has conducted extensive research on the financial reporting behavior of publicly traded corporations. He has received several teaching awards including the Wharton Graduate Association MBA Core Curriculum Teaching Award, 1999, 2000; Wharton Graduate Association Teaching Award, 2001; and Wharton School Graduate Division Miller-Sherrerd MBA Core Teaching Award 2002, 2003.

Recent articles he has published include "Information Aggregation in Polls," with J. Morgan, *American Economic Review*, 2008; "Credibility of Management Forecasts," with J.L. Rogers, *Accounting Review*, 2005; "Effect of Speculation on Earnings Management and Investor Information," with P.E. Fischer, *Journal of Accounting Research*, 2004; "Financial Reporting System Choice and Disclosure Management," with R. Verrecchia, *Accounting Review*, 2004; "An Analysis of Stock Recommendations," with J. Morgan, *RAND Journal of Economics*, Spring 2003; "Information Intermediaries and Communication," with P.E. Fischer, *Journal of Accounting Research*, June 2001; "Credibility of Voluntary Disclosure," *RAND Journal of Economics*, Summer 2000.

He serves on the editorial board of *The Accounting Review* and the *Review of Accounting Studies*, and is a reviewer for the National Science Foundation. He also served on the planning committee for the 2009 FASB/IASB Financial Reporting Issues Conference.

Prior to joining Tuck, Professor Stocken was on the faculty at the Wharton School at the University of Pennsylvania. Before entering academia, he was an assistant audit manager at Ernst & Young.