



Fall Planning Retreat

September 12 & 13

Biltmore

Goals:

- Leverage the collective knowledge and experience within the region
- Create pillar-focused strategies & tactics that deliver the Alliance's regional mission
- Increase ownership and engagement in the 2020 plan

Thursday, September 12

10:00 a.m.	REGISTRATION OPENS (Amherst)	
11:00 a.m.	WELCOME	Jennifer Weber, 2020 CLT Alliance Chair
	PRESENTING SPONSOR WELCOME	Kathryn Black, Bank of America
11:15 a.m.	TWO STATES. ONE REGION.	NC Gov. Roy Cooper SC Gov. Henry McMaster Moderator: Tracy Montross, American Airlines
12:30 p.m.	LUNCH AND TABLE DISCUSSION (Deerpark)	
1:30 p.m.	THE REGION: BY THE NUMBERS (Amherst)	Antony Burton, CLT Alliance Chuck McShane, CLT Alliance
	The Charlotte Region's economy is changing rapidly. This presentation provides historical perspective, current context and future projections on the economic health of the Charlotte Region.	
2:00 p.m.	THE ALLIANCE: REVIEW STRATEGY WORK Review of mission, pillars and strategy work Review Survey Results Set-up breakouts	Janet LaBar, CLT Alliance Barr Blanton, McKinsey & Company Rob Horton, CLT Alliance Chris Paul, Slalom

2:45 p.m. **INTERMISSION**

3:00 p.m. **BREAKOUT SESSION** (Amherst and Hemlock)

There are two breakout sessions that will be conducted twice. Each session will cover two pillar deep dives. Each participant participates in one breakout on Day One and one on Day Two. Each session includes representatives from the region as well as topic experts and internal staff to level-set.

Thursday, September 12

3:00 – 4:00 PM

- **GROUP 1** | Room 1 Topic 1: Business: Steven + (Lee Fite, Fifth Third Bank)
- **GROUP 2** | Room 2 Topic 1: Advocacy: Joe + (Betty Doster, UNC Charlotte)

4:00 – 5:00 PM

- **GROUP 1** | Room 1 Topic 2: Marketing: Rob + (Greg Walter, CMS)
- **GROUP 2** | Room 2 Topic 2: Talent: Rod + (Laura Turner, TIAA)

Key questions:

- What are the 1-3 most impactful initiatives the Alliance could implement in 2020 to achieve the pillar goal?
- How would the impact of this/these initiative(s) be measured?
- How can I – the regional stakeholder – support that effort?

5:00 p.m. **WRAP UP**

Weber

5:15 p.m. **HOTEL CHECK-IN**

6:30 p.m. **RECEPTION** (Shuttle needed: Lioncrest Courtyard)

7:30 p.m. **DINNER** (Lioncrest Veranda)

Friday, September 13

7:30 a.m. **BREAKFAST BUFFET** (Shuttle needed: Amherst)

8:00 a.m. **WELCOME** **Weber**

8:15 a.m. **BREAKOUT SESSION** (Amherst and Hemlock)

There are two breakout sessions that will be conducted twice. Each session will cover two pillar deep dives. Each participant participates in one breakout on Day One and one on Day Two. Each session includes representatives from the region as well as topic experts.

Friday, September 13

8:15 – 9:15 AM

- **GROUP 2** | Room 1 Topic: Marketing: Rob + (Greg Walter, CMS)
- **GROUP 1** | Room 2 Topic: Talent: Rod + (Laura Turner, TIAA)

9:15 – 10:15 AM

- **GROUP 2** | Room 1 Topic: Business: Steven + (Lee Fite, Fifth Third Bank)
- **GROUP 1** | Room 2 Topic: Advocacy: Joe + (Betty Doster, UNC Charlotte)

Key questions:

- What are the 1-3 most impactful initiatives the Alliance could implement in 2020 to achieve the pillar goal?
- How would the impact of this/these initiative(s) be measured?
- How can I – the regional stakeholder – support that effort?

10:15 a.m. **INTERMISSION**

10:30 a.m. **COLLECTIVE KNOWLEDGE** **LaBar**
Chris Paul, Slalom

Review Breakout Session top BIG IDEA along with measurable Key Performance Indicator by overall rank from combined sessions.

11:45 a.m. **NEXT STEPS & CONCLUDING REMARKS** **Weber**
2019 Mecklenburg County Referendum

12:00 p.m. **OPTIONAL LUNCH**
Bistro at Antler Village
Cedric's Tavern at Antler Hill Village
Village Social at Village Hotel on Biltmore Estate

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