

Private ERM Boot Camp for Corporate Teams

A practical, hands-on ERM workshop delivered exclusively for organizations. Equip your team with a shared framework, practical tools, and a clear path to strengthen or advance your ERM program.

On-site | Live Virtual | Hybrid

OVERVIEW

SimErgy's ERM Boot Camp is delivered as a private workshop for organizations that want to build, refresh, or elevate their ERM capabilities. The program combines expert instruction, practical exercises, case studies, and discussion tailored to your organization's ERM maturity, industry context, and team composition. Teams leave with a common language, practical tools, and actionable approaches they can apply immediately.

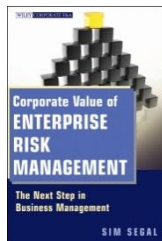
INSTRUCTOR



SIM SEGAL, FSA, CERA is a globally-recognized ERM thought leader renowned for his engaging presentation style. Segal is president of SimErgy, which provides a full range of ERM consulting services; founder and director of the M.S. in ERM program at Columbia University; author of *Corporate Value of Enterprise Risk*

Management, well received by the business community and required reading on syllabi of the SOA and leading universities; and host of *Risk Radio*. Segal has given 200+ presentations on ERM and risk topics. He has been quoted as an ERM expert by media such as the Wall Street Journal, Treasury & Risk, and CFO

Magazine. Segal has authored articles in leading publications such as Forbes, American Banker, and Corporate Finance Review. Segal is former VP on the board of directors of the SOA, also serving as inaugural chair of its Risk Committee, leading the design/implementation of their ERM program. He is a Fellow of the Society of Actuaries (FSA) and a Chartered Enterprise Risk Analyst (CERA).



WHAT YOUR TEAM WILL GAIN

Your team will gain practical capabilities that help your organization:

1. Implement an advanced yet practical ERM framework
2. Quantify strategic and operational risks
3. Define risk appetite more clearly and quantitatively
4. Integrate ERM into strategic planning and major decisions
5. Avoid the 5 common mistakes of risk identification
6. Evaluate your ERM program against 10 key criteria
7. Conduct more effective qualitative risk assessment
8. Build better risk categorization and definition tools
9. Develop stronger risk scenarios using the Failure Modes and Effects Analysis technique
10. Increase stakeholder buy-in and support ORSA-related requirements

WHAT THE WORKSHOP COVERS

- Defining ERM
- Challenges to ERM
- ERM framework
- Risk categorization and definition
- Qualitative risk assessment
- Quantifying individual risk exposures
- Quantifying enterprise risk exposure
- Defining risk appetite
- Killer risks
- ERM implementation timeline

WHO THIS WORKSHOP IS FOR

This workshop is designed for organizations that want to train a dedicated group of leaders and practitioners involved in enterprise risk management, governance, assurance, or risk-informed decision making.

- CROs and ERM leaders
- ERM teams
- Internal audit leaders and staff
- Finance and strategy teams
- Governance, compliance, and reporting teams
- Cross-functional leadership groups involved in enterprise risk decisions

REQUEST A PROPOSAL

Email us at info@simergy.com

We will follow up to discuss your needs.

SimErgy ERM Boot Camp
Sample Detailed Program

Day 1	
8:30am-10:30am	1) Defining ERM <ul style="list-style-type: none"> Definition of risk Basic definition of ERM The 10 key criteria of ERM Exercise 1 (group): Evaluate case against 10 key criteria ERM process cycle Benefits of ERM to stakeholders
10:30am-10:45am	Morning Break
10:45am-12:00pm	2) Challenges to ERM <ul style="list-style-type: none"> ORSA requirements Rating agency requirements Three core challenges typical of traditional ERM frameworks
12:00pm-12:45pm	Lunch Break
12:45pm-3:30pm	3) ERM Framework <ul style="list-style-type: none"> Value-based ERM framework Overcoming ERM challenges Non-corporate entity framework
3:30pm-3:45pm	Afternoon Break
3:45pm-5:00pm	4) Risk categorization and definition <ul style="list-style-type: none"> Risk categorization and definition (RCD) tool Defining risks by source Categorizing risks evenly Exercise 2 (group): Categorize risks Exercise 3 (solo): Categorize risks

Day 2	
8:30am-9:30am	5) Qualitative risk assessment (QRA) <ul style="list-style-type: none"> Defining metrics clearly Conducting QRA survey Gathering data appropriately Identifying risks prospectively Exercise 4 (pairs) Conduct surveys Conducting QRA consensus meeting
9:30am-10:30am	6) Quantifying individual risk exposures <ul style="list-style-type: none"> Developing quantitative model Calculating baseline valuation Deterministic vs. stochastic scenarios Developing scenarios using FMEA
10:30am-10:45am	Morning Break
10:45am-12:00pm	<ul style="list-style-type: none"> Exercise 5 (group): Conduct FMEA Quantifying individual risk exposures Case studies Exercise 6 (group): Quantify individual risk exposures
12:00pm-12:45pm	Lunch Break
12:45pm-3:30pm	7) Quantifying enterprise risk exposure <ul style="list-style-type: none"> Quantifying enterprise risk exposure Economic capital vs. value-based ERM models Exercise 7 (group): Quantify enterprise risk exposure 8) Defining risk appetite <ul style="list-style-type: none"> Risk appetite consensus meeting Defining risk appetite quantitatively Defining risk limits quantitatively
3:30pm-3:45pm	Afternoon Break
3:45pm-5:00pm	9) Killer risks 10) ERM implementation timeline

DELIVERY OPTIONS

On-site workshop

Delivered at your location for a dedicated group from your organization.

Live virtual workshop

Delivered online for distributed teams.

Hybrid workshop

Structured for organizations with both in-person and remote participants.

CUSTOMIZATION

Customization can include:

- Workshop length
- Agenda emphasis
- ERM maturity level
- Industry context
- Team composition

WHY COMPANIES CHOOSE SIMERGY

- Over 15 years of ERM boot camp experience
- Practical frameworks and immediately usable tools
- Customization to your organization's needs
- Deep ERM consulting expertise
- Led by Sim Segal, recognized ERM thought leader, consultant, author, and educator

Attendees will also receive **FREE** copies of:

Segal's highly acclaimed book, *Corporate Value of Enterprise Risk Management*, a practical guide to implementing ERM at your organization.

