

**ASP  
2019**

**STRATEGY  
AND YOUR  
BUSINESS  
ECOSYSTEM**



**DENVER  
COLORADO**  
PRE CONFERENCE | MAY 15  
CONFERENCE | MAY 16 - 17

**\*AGENDA IS SUBJECT TO CHANGE\***

**2019  
CONFERENCE  
AGENDA**

# WEDNESDAY MAY 15 - PRE CONFERENCE

9:00 AM - 4:30 PM

## MASTERCLASSES - \$225 PER CLASS

	<u>Masterclass 1</u>	<u>Masterclass 2</u>	<u>Masterclass 3</u>
9:00 AM - 12:00 PM	<b>Michael Wilkinson</b> <i>Leadership Strategies Inc.</i> <b>The Secrets of Facilitation</b>	<b>Norma Watenpaugh</b> <i>Phoenix Consulting Group</i> <b>Creating and Managing Transformative Business Ecosystems</b>	<b>Frank Spencer</b> <i>Kedge, LLC</i> <b>Wicked Opportunties: Creating Strategic Transformations</b>
1:30 PM - 4:30 PM	<b>David Wilsey</b> <i>Balanced Scorecard Institute</i> <b>Measuring the Success of Your Business Ecosystem</b>	<b>Joyce Reynolds-Sinclair &amp; Leland Russell</b> <i>GEO Group Strategies Services</i> <b>5 Keys to Success in Leading Strategic Cross-Boundary Collaborations</b>	<b>Larry Cooper &amp; Dan Murphy</b> <i>AdaptiveOrg Inc.</i> <b>Evolve Your Ecosystem Capabilities: Building Strategic Agility</b>
5:00 - 7:00 PM	<b>Opening Reception</b>		

## CERTIFICATION STUDY COURSE - \$300

	<u>Certification Study Course - Full Day</u>
9:00 AM - 4:30 PM	<b>James D. Stockmal</b> <i>Assoication for Strategic Planning (ASP)</i> <b>Are you Certifiable? A Kick-Off for Certification Study</b>

# THURSDAY MAY 16 - CONFERENCE DAY 1

7:30 AM - 5:30 PM

7:30 AM - 4:30 PM	Registration and Exhibitor Showcase		
8:00 AM - 8:30 PM	Breakfast		
8:30 AM - 9:00 AM	Opening Remarks & Announcements		
9:00 AM - 9:00 AM	<a href="#">Keynote Presentation: Colorado's Innovation Ecosystem - Dan Powers, CO-LABS</a>		
	<a href="#">Session 1</a>	<a href="#">Session 2</a>	<a href="#">Session 3</a>
9:45 AM - 11:00 AM	<b>Elizabeth Roll &amp; Amber Harwell</b>  <i>Sandia National Laboratories</i>  <b>Strategy Games for Strategic Advantage</b>	<b>Syed Mehdi &amp; Chris Anderson</b>  <i>San Antonio International Airport</i>  <b>Well No One Asked Me: An Airport's Approach to Promote Community Buy-in</b>	<b>Marsha Shenk</b>  <i>The BestWork People</i>  <b>Ecosystem Intelligence: A Generative Exercise and Leading Indicator</b>
11:00 AM - 11:30 AM	Break and Exhibitor Showcase		
	<a href="#">Session 4</a>	<a href="#">Session 5</a>	<a href="#">Session 6</a>
	<b>Dr. Aaron Bazin</b>  <i>Fulcrum LLC - U.S. Special Operations Command</i>	<b>Nikki Syverson</b>  <i>Capital Crossroads</i>	<b>Steve Tighe</b>  <i>Chasing Sunrises</i>
11:30 AM - 12:45 PM	<b>Winning Trust</b>	<b>Capital Crossroads: Case Studies in Multi-Jurisdiction Planning &amp; Action</b>	<b>Using Collaborative Scenario Development to Anticipate Your Future Business Ecosystem</b>
12:45 PM - 1:45 PM	Lunch		
1:45 PM - 2:30 PM	<a href="#">Keynote Presentation: Patrick Hoverstadt, Fractal Consulting</a>		
2:30 PM - 3:30 PM	<i>Speaker Corner - More details coming soon</i>		
3:30 PM - 4:15 PM	Break & Exhibitor Showcase		
	<a href="#">Session 7</a>	<a href="#">Session 8</a>	<a href="#">Session 9</a>
4:15 PM - 5:30 PM	<b>Gary Zaborac &amp; Denise McNerney</b>  <i>Clay County - Public Health Center &amp; iBossWell Inc.</i>  <b>Creating &amp; Sustaining a Nonprofit Collaboration: A Case Presentation</b>	<b>Juliette Bastian</b>  <i>Balanced Scorecard Institute</i>  <b>Balancing Business Ecosystems with Collaborations</b>	<b>Harsit Patel</b>  <i>ADP, LLC</i>  <b>Self Funding Transformation from Direct to a Collaborative Business Model</b>
6:30 PM - 9:30 PM	Networking Dinners (optional)		

# FRIDAY MAY 17 - CONFERENCE DAY 2

8:00 AM - 3:00 PM

8:00 AM - 2:00 PM	Registration and Exhibitor Showcase		
8:00 AM - 9:00 AM	Breakfast		
8:30 AM - 9:00 PM	<a href="#">Panel Discussion</a>		
<b><u>Harness the Power of People for a Future-Proof Strategy</u></b>			
Sponsored by:			
			
10:00 AM - 10:45 AM	<b><u>Keynote Presentation: Hannah Davis, Techstars Sustainability Accelerator</u></b>		
10:45 AM - 11:15 AM	Break & Exhibitor Showcase		
11:15 AM - 12:30 PM	<i>Strategy Cafe - More Details Coming Soon</i>		
12:30 PM - 1:45 PM	Lunch, Annual General Meeting & Awards		
	<b><u>Session 10</u></b>	<b><u>Session 11</u></b>	<b><u>Session 12</u></b>
	<b>Gloria Negrete</b>	<b>Lauret Howard</b>	<b>Pierre Hadaya</b>
	<i>University of California San Diego</i>	<i>Watchtower Consulting</i>	<i>ESG UQAM - Université du Québec à Montréal</i>
1:45 PM - 3:00 PM	<b>Innovation Strategy: From Idea to Product, Leveraging University Innovation Ecosystems</b>	<b>Enabling a Comprehensive Continuity Strategy</b>	<b>The Business Architecture Approach to Formulate and Implement a Strategy that Leverages the Business Ecosystem</b>
3:00 PM	Conference Close		

# MASTERCLASS 1

9:00 AM - 12:00 PM

## THE SECRETS OF FACILITATION

Fasten your seat belts and get ready for a ride! In this session, the dynamic author of *The Secrets of Facilitation* will guide you through a preview of this comprehensive methodology for facilitating groups, task forces, strategy teams and other sessions that require groups to come together to achieve a common end.

In this fast-paced, power-packed session, you will learn:

The five Ps of preparation:

- The four keys for grabbing people's hearts and souls at the start
- Two important strategies for keeping the group focused and on track
- The surprising secret to phrasing questions so you get a bonfire of responses
- The four-step formula for resolving dysfunction
- The three reasons people disagree and strategies for resolving each
- The secret to using Level 3 energy to transform a group

"I had no idea how much I didn't know," is the comment from one 10-year facilitation veteran after experiencing the workshop. Whether you are a long-time facilitator/trainer or new to facilitating teams and groups, you will walk away with tips you can use tomorrow.



**MICHAEL WILKINSON**  
Leadership Strategies, Inc.

Mr. Wilkinson is the Managing Director of Leadership Strategies, Inc. - a leadership training and strategy consulting firm specializing in group facilitation. He is considered a national leader in the facilitation industry.

- Author of *The Secrets of Facilitation* and *The Secrets to Masterful Meetings*.
- Board member of the International Institute for Facilitation.
- Founder of the FindaFacilitator database.
- One of the first five Certified Master Facilitators in North America.
- Named Facilitator of the Year in 2003 by the Southeast Association of Facilitators.

Active in both the private and public sectors, he has provided leadership training and strategy development assistance to such diverse organizations as The Coca-Cola Company, Unisys, Sears, EPA, CDC, KPMG Peat Marwick, and the American Cancer Society.

Mr. Wilkinson is a much sought after facilitator, trainer and speaker, both in the U.S. and around the globe. He has completed international assignments in Bangkok, Brisbane, Glasgow, Hamburg, Hong Kong, London, Melbourne, Milan, Singapore, Sydney and Wellington. Past participants have commented that his dynamic presentation style, combined with his unique insights, make for an intense, power-packed session.

Prior to Leadership Strategies, Mr. Wilkinson spent six years with ADP and eight years in the information technology practice of Ernst & Young's Management Consulting Group. He is a High Honors graduate from Dartmouth and resides with his wife and two children in Atlanta.

# MASTERCLASS 2

9:00 AM - 12:00 PM

## CREATING & MANAGING TRANSFORMATIVE BUSINESS ECOSYSTEMS

Companies of all sizes are facing some daunting challenges in digital transformation, globalization, and the constant pressure to do more with less. More and more companies seek out partners to buffer the impact, gain skills and access innovation. More than half of CEOs, particularly those that IBM labeled 'reinventors' in their recent 2018 CEO survey, are seeking to partner more. Yet collaboration still falls into the skills gap. Failure rates for partnering still exceed 50%. But it doesn't have to be a coin toss.

Companies that are thriving in the new normal of disruption, understand that success requires collaboration and innovation with partners within ecosystems and on platforms. In this masters workshop, we will explore how to achieve strategic results through recruiting and managing the right partners in the right ecosystem.



**NORMA WATENPAUGH**  
Phoenix Consulting Group

Norma Watenpaugh is the founding principal and CEO of Phoenix Consulting Group which provides education and consulting services with expertise in multi-channel strategy, alliance management, and ecosystem development. Prominent clients include Amazon, Dell, PayPal, Google, SAP, and Xerox.

Norma has delivered collaboration seminars for the Reuters Foundation, Digital Vision Fellowship Program at Stanford University, and the American Management Association. She is a frequently requested guest lecturer and speaker at industry events speaking on partnering trends in Digital Transformation and Internet of Things initiatives.

Norma is a Board member of the Association of Strategic Alliance Professionals and former Best Practices Committee Chair. She has led the organization in developing professional certifications and in revitalizing the ASAP Handbook of Alliance Management, often referred to as the Bible of profession.

She currently leads the US delegation to the ISO standards committee for Collaborative Business Relationship Management and is the liaison to the Collaborative Innovation Management Technical Committee.

She was named a Woman of Influence in Silicon Valley by the Silicon Valley Business Journal for her work in advancing best practices in Collaborative Working.

# MASTERCLASS 3

9:00 AM - 12:00 PM

## WICKED OPPORTUNITIES: CREATING STRATEGIC TRANSFORMATIONS

We live in an age where accelerating complexity and exponential change is the norm - an unpredictable world that requires a completely different approach to business, economics, technology, and social development.

Wicked Opportunities are the unique and unseen possibilities that are created by the new, developing and complex situations presented through wicked problems. The Wicked Opportunities program embraces increasing complexity as a birthplace from which to create strategic transformations - innovative and often unseen strategies, partnerships, products, and solutions to global business challenges.

The program kicks off with Wicked Designs where participants are first exposed to emerging issues. Once immersed in these trends, they will converge them and identify collisions that result in strategic transformations. They then refine and prioritize their strategic transformations through Wicked Intentions - using cascading growth curves to identify breakpoints and breakthroughs. Participants discover short- and long-term possibilities embedded within the DNA to fully capitalize on potential.

Within a few hours, participants gain a tangible and replicable framework that can be immediately used to create future-empowered strategies within their organizations.



**FRANK SPENCER**  
Kedge, LLC

Frank is a published author and speaker, delivering presentations and workshops around the globe. He holds a MA in Strategic Foresight from Regent University. With a strong background in both business and academic foresight, Frank was the creator and lead instructor of The Futures Institute: Shaping The Future Now at the Duke University Talent Identification Program Institute. He has worked on foresight for companies like Kraft, Mars, and Marriott. Frank also led the effort to establish foresight as a leadership competency across The Walt Disney Company, training over 300 employees across the globe. He is the founding partner at Kedge, a foresight, innovation, creativity and strategic design firm. Frank is also co-founder of The Futures School, a multi-disciplinary Strategic Foresight training program. He's created a worldwide network of foresight campuses in North America, Europe, Africa, Asia and Latin America. More than 500 global citizens have joined The Futures School movement to embody a future-empowered mindset.

# MASTERCLASS 4

1:30 PM - 4:30 PM

## MEASURING THE SUCCESS OF YOUR BUSINESS ECOSYSTEM

While coordinating with multiple organizations toward a common goal sounds like a sophisticated strategy for success in an increasingly connected world, in reality collaboration is difficult. Usually the definition of success is different, even conflicting, from stakeholder to stakeholder. If various stakeholders can't agree on key objectives, how can a common set of meaningful measures of success be designed and embraced? Without agreement on desired measurable outcomes, how can any venture succeed?

In this masterclass, an interactive simulation exercise will be used to demonstrate key principles for measuring the success of your business ecosystem. Participants will begin the activity assigned to various roles within an easy-to-understand business venture, from manufacturer to technology partner, government regulator, supplier, customer, and union member. Each stakeholder group will begin the simulation with their own individual motivations and will work through several best practice exercises to identify common objectives, intended results, and performance measures. The curriculum and concepts will be based on BSI's Key Performance Indicator Professional program offered in partnership with the George Washington University College of Professional Studies.



**DAVID WILSEY**

Balanced Scorecard Institute

BSI Chief Operating Officer David Wilsey is a strategic planning, performance measurement, and strategy execution specialist and thought leader. He is the co-author of BSI's signature book, "The Institute Way - Simplify Strategic Planning and Management with the Balanced Scorecard", co-author of the Strategy Professional Resource Center's "Association for Strategic Planning SMP/SPP/SPA Certification Exam Study Guide", and the author of numerous articles and a widely read blog. He currently manages BSI's business operations. He has 24 years of experience in a wide range of fields, including consulting & training, engineering, marketing, manufacturing, design, programming, research, education, and multimedia production. He has led numerous BSI client engagements and has taught hundreds of participants over many years of balanced scorecard public and client-site workshops. He is a former PuMP (Performance Measure Process) Consultant and is a certified Strategic Management Professional (Association for Strategic Planning).

# MASTERCLASS 5

1:30 PM - 4:30 PM

## 5 KEYS TO SUCCESS IN LEADING STRATEGIC CROSS-BOUNDARY COLLABORATIONS

Organizations working in concert can dramatically leverage resources and accelerate collective impact, while also increasing their individual mission impact. That is why more and more organizations now engage in alliances, partnerships, and other forms of cross-boundary collaboration. However, leading cross-boundary strategy creation and aligning execution is no mean feat. It requires new mindsets, new skills, and new tools.

Attend this session to discover 5 Keys to Success in Leading Strategic Cross-Boundary Collaborations. You will learn how to establish trust, which is a prerequisite for successful collaboration; how to achieve smart strategic thinking by tapping collective intelligence; how to avoid decision inertia with complex issues; how to activate passion, excitement, and emotional engagement; and last, but not least, how to leverage technology to turbocharge all aspects of your cross-boundary collaboration.

This session is designed for strategists and leaders who want to meet diverse stakeholder expectations with less stress and struggle, and who want to increase alignment across geographic and functional boundaries to reduce the frustration of people thinking and working at cross-purposes.



**JOYCE REYNOLDS-SINCLAIR, Ph.D.**  
GEO Group Strategic Services

As Managing Director of GEO Group Strategic Services, Joyce has served hundreds of leaders of Fortune 500 and mid-size firms, as well as non-profits. She is an expert in designing and facilitating large-scale collaborations, deploying the 'best of the best' methods to think, plan, act using rapid-cycle processes and Collective IQ technology.

Joyce has deep roots in the strategic planning community and been very active over many years in the leadership of ASP. She cofounded the NorCal chapter in 2003, continues as its Strategic Advisor, and served on the ASP Board of Directors 2003-2009.

She initiated and led the ASP Chapter Council 2007-2009 and served on the Certification Operations Committee 2010-2012. Joyce received the ASP Outstanding Service Award and Distinguished Service Award in 2009, and the Janice Laureen Outstanding Service Award in 2010 when she was also inducted into the ASP Hall of Fame.

Prior to her decade with GEO, Joyce held senior positions at Genentech, Children's Hospital at Stanford, and Kaiser Permanente, and is currently the Board Chair of the Magical Bridge Foundation.



**LELAND RUSSELL**  
GEO Group Strategic Services

Leland Russell is the CEO and founder of GEO Group Strategic Services, a consulting firm with a long track of success with Fortune 500 organizations, mid-size firms, and start-ups. GEO's typical clients are organizational leaders and mission-critical teams.

Leland has served as a strategic advisor and designer of a wide range of cross-boundary collaborations, including R20 — a Geneva-based alliance of 35 other States, Provinces and Regions from the 5 continents focused innovative energy solutions; the Project on National Security Reform — a bi-partisan non-profit that developed one of the most comprehensive security reform initiatives in American history; and, the Collective Impact Partnership — five leading gender equality organizations focused on Women's and Girl's Economic Empowerment Advocacy in India.

Leland is the co-author of Winning In FastTime®, which has been endorsed by top business and non-profit executives, senior military officers, and best-selling authors. He has produced widely-distributed videos about leading strategic change. His "GEO Paradigm™" video has been licensed by over 1000 organizations worldwide.

# MASTERCLASS 6

1:30 PM - 4:30 PM

## EVOLVE YOUR ECOSYSTEM CAPABILITIES: BUILDING STRATEGIC AGILITY

Today's organizations, their leaders, and their people have become overwhelmed by the sheer volume and pace of change. Traditional management models and approaches that many still believe bring order to chaos, are instead stifling innovation while wasting the energy and talents that people need in order to respond. While organizational ecosystems have always incorporated the three main players (clients/customers, its people and its partners/suppliers), traditional organizations have tended to operate from an inside-out perspective that excluded customers and partners/suppliers. While the age of the customer introduced an outside-in perspective, it did not embrace the other two players. To thrive in the digital age, organizations need all three perspectives, as well as becoming organization-as- platform to continually evolve their ecosystem capabilities on the path to long-term resilience and sustainability. Strategic agility is the keystone in evolving an organization's ecosystem while balancing the three perspectives.

Join AdaptiveOrg in this three-hour master class that will introduce chief strategy officers, executives and leaders to strategic agility, the keystone to success in the digital age. The digital age necessitates transformation across all facets of your organization including leadership, people, technology, and your partners and suppliers. The speed at which these changes need to happen demands you master strategic agility over strategic planning. Strategic agility moves you from trying to "predict and plan" what might happen, to where you can "sense and respond" to what is actually happening, while taking action with purpose.



**LARRY COOPER**  
AdaptiveOrg, Inc.

It's time to focus on the human side of organizations and what sets them up for success. Understanding our purpose, elevating the importance of values and principles, and creating a relentless focus on creating value for those our orgs exist to serve, is how we can elevate the digital revolution into a human-centered one.

My goal is to help people and organizations identify and focus on their collective purpose.

A leader in agile business value management, I delivered the first workshop on the topic in 2010 at BA\*World Toronto and was a lead contributor to the Agile Business Value learning track of ICAgile. I have over 40 years of leadership, product development, business development, and operational experience in the Canadian and US public and private sectors.



**DAN MURPHY**  
AdaptiveOrg, Inc.

Dan Murphy is a partner in AdaptiveOrg Inc. He has been engaged in a number of IT service development initiatives over the years related to the transformation of large complex organizations leveraging Agile / Lean methods. He has been coaching senior executives on Agile and leading Agile initiatives in the Canadian public sector for the last 15 years. Mr. Murphy has been called multiple times to witness to political level committees on the adoption of Agile in the public sector. He has presented at major symposiums on how to leverage Agile methods for large IT network and cloud service development initiatives. He has developed national services that delivered clear and measurable business value. Passionate about project success, and client focus, he has applied Agile methods across the enterprise including HR, Supply Management, Finance as well as IT.

He began his career at IBM, and later moved to Cisco Systems, where, in the late 1990's he led the development of the "Shared Services" concept and pushed it into existence at the political level within the Federal Government.

# CERTIFICATION STUDY COURSE

9:30 AM - 4:30 PM

## ARE YOU CERTIFIABLE? A KICK-OFF FOR CERTIFICATION STUDY

This full day pre-conference course offers exposure to key strategy concepts that candidates for ASP certification in either SPP or SMP would need to understand to be successful. The course surveys key concepts in the four domains of our certification program: Lead, Think, Plan and Act. In each domain, a successful candidate answers multiple choice questions involving three strategy elements: content, process and context. This course is designed to be a kick-off for your study plan. This course will help you assess how much and what kind of study you would need to do to be successful on an ASP certification exam. We will also help you develop a study plan for success.



**JAMES D. STOCKMAL**

Association for Strategic Planning (ASP)

James Stockmal, President of the Association for Strategic Planning (ASP) has over 25 years of experience in helping organizations develop and execute strategy through the integration of people-focused, process-oriented, and technology-enabled initiatives. Mr. Stockmal has employed a variety of strategic tools and methods for public and private sector clients, including environmental scanning, balanced scorecard, competitive analysis, and blue ocean strategy. Strategy clients include the Royal Bank of Canada, Australian New Zealand Bank, the Bank of Montreal, CitiCorp, Aetna, Ford Motor Company, Estafada, and Exxon Mobil. His government clients include the US Air Force, the US Army, the Navy Criminal Investigative Service (NCIS), the Millennium Challenge Corporation, NASA, the General Services Administration, NTSB and NOAA. His non-profit clients include San Miguel DC and DC Net Impact.

Mr. Stockmal writes monthly articles on strategy development, execution and transformation for The Strategic Edge, a publication of the Association for Strategic Planning (ASP).

# KEYNOTE PRESENTATION

9:00 AM - 9:45 AM

## COLORADO'S INNOVATION ECOSYSTEM

Colorado has an incredible spectrum of innovative industries built around a core of universities, colleges and over 30 federally-funded research laboratories and institutes. From aerospace to agtech, bioscience to clean energy, transportation to climate science, CO-LABS convenes and nurtures this network of technology, engineering and scientific stakeholders. With a mission to champion this network and help manifest discoveries from the labs to commercialization, CO-LABS drives collaboration and connectedness between business, government, higher education and public sector organizations. Ultimately, CO-LABS provides success stories and connections with elected officials at local, state and federal levels to emphasize the economic and intellectual benefits of taxpayer-funded research in Colorado. Come learn how CO-LABS builds on this network and the strategic plans to grow their network in 2019.



**DAN POWERS**  
CO-LABS

Dan Powers is the Executive Director of CO-LABS, a consortium of more than 30 federal research laboratories & university institutes, and their ecosystem in Colorado of technology-oriented companies and economic development organizations. Nurturing an informed evolution of society is his mission. A University of Colorado-Boulder alum, he has 25 years' experience in policy assessment and public engagement for government agencies and economic development organizations. He's who Malcolm Gladwell would call a connector: Dan loves to find the "right people" from different professional and civic realms who should be introduced to each other. Since joining CO-LABS in 2016 he's brought together thousands of people with an interest in scientific discovery and technology commercialization via lab tours, awards events, workshops, conference calls and other relevant gatherings. He is a huge fan of Ted Talks, audiobooks and 70s metal bands. He lives in Colorado with his wife Tara who recently wrote *Virtual Teams for Dummies* and their two young daughters, who call him a science geek.

# 75 MINUTE SESSION

9:45 AM - 11:00 AM

## STRATEGY GAMES FOR STRATEGIC ADVANTAGE

Leaders can harness strategy games in important ways to get immersed into an environment to explore different facets of strategic challenges. The world is more complex and dynamic than ever. In this world, we are expected to develop strategies that will help us navigate our environment/ecosystem. Strategy games can “enhance” reality by simulating different scenarios that require specific strategic responses. Come and learn how we created a board game and how to adapt it for your company. After all, it’s not often that we’re allowed to play games at work. Come play with us!



**ELIZABETH ROLL**  
Sandia National Laboratories

Elizabeth Roll is the Senior Strategist and an Executive Coach at Sandia National Laboratories in Albuquerque, NM. She is the lead architect for the Labs-wide strategic planning activity, consulting to the organization’s senior-most executives. Elizabeth is the Coach Lead for the Lab’s flagship leadership development program for high-potential executives. Elizabeth’s expertise is in strategic planning, change management, and leadership development.

Elizabeth received her Bachelor’s Degree in Economics and a minor in Mathematics from Bryn Mawr College and her MBA, with a concentration in Corporate Strategy and Finance, is from the University of Michigan Ross School of Business. She was trained in organizational development, group process, and coaching at the Gestalt Institute of Cleveland. Elizabeth is a Gestalt Professional Coach, a Board Certified Coach (BCC), and the International Coaching Federation (ICF) has recognized her as a Professional Certified Coach (PCC).



**AMBER HARWELL**  
Sandia National Laboratories

Amber Harwell is a Strategist at Sandia National Laboratories in Albuquerque, NM. She supports the organization’s strategic planning activities and provides strategic management consulting services to leaders and managers across the Lab. Amber also leads the Labs’ strategy community of practice with over 150 members with the purpose of developing the “strategy” competency across the organization. Amber received her Bachelor’s Degree in Organizational Development from the University of New Mexico and her MBA in Policy and Planning with an emphasis in Strategic Management from the Anderson School of Management at the University of New Mexico.

Amber spends her spare time with her husband and 2-year-old daughter and volunteers for her local church.

# 75 MINUTE SESSION

9:45 AM - 11:00 AM

## Well No One Asked Me; An Airport's Approach to Promote Community Buy-in

We've all been involved in making decisions as a group, right? Typically, it's a quick process to identify a majority, persuade the opposition, and move forward with consensus. Now imagine you're talking about making potential "life-altering" decisions on the financial future of an entire region of your state. The San Antonio Airport System is in such a position, but may have found the balance to ensure all voices are heard, acknowledged, and appreciated as we lay out a plan for the next 20 and 50 years.



**SYED MEHDI**

San Antonio Airport System

Syed Mehdi is the Chief Strategy & Development Officer with the Aviation Department of the City of San Antonio. The department manages San Antonio International and Stinson Municipal Airports. Syed is charged with the implementation and managing the corporate and development strategy. Syed is currently leading San Antonio International Airport's strategic development plan. Syed has over 23 years of experience working for airports worldwide as a consultant and in management roles specializing in strategic planning and air service development. Syed has Bachelor's in Mechanical Engineering and a MS in Airport Planning and Management from Loughborough University in the UK.



**CHRIS ANDERSON**

San Antonio Airport System

Chris Anderson is the Business Process Manager for the Aviation department with the City of San Antonio. In this role, he administers process improvement efforts within the department and is a member of the Strategic Development Plan team. The Strategic Development Plan is a data-driven study aimed at determining the suitability of the current airport footprint for growth and expansion in the next 50 years. In addition to these tasks, Chris coordinates logistics for the 22-member Airport System Development committee, created by the Mayor.

# 75 MINUTE SESSION

9:45 AM - 11:00 AM

## Ecosystem Intelligence: A Generative Exercise and Leading Indicator

Marsha is a pioneering Business Anthropologist, known for integrating insights from multiple disciplines to business challenges. Four decades in the trenches with leaders have proven ample testing grounds for models that include neuroscience, ecology, martial arts and philosophy of language.

She is a popular speaker and beloved teacher and coach, a lifetime learner currently at work to make Ecosystem Intelligence and the influence of the social brain accessible to organizations addressing ongoing change.



**MARSHA SHENK**  
The BestWork People

Both experiential and explanatory, this session will take participants through a simple process that unlocks Ecosystem Intelligence and readily generates new value while building resilience.

We'll examine how and why it works, and what gets in the way (hint: the social brain...)

Participants will leave with a Dashboard they can apply in their own ways.

The session will be both fun and hard work.

# 75 MINUTE SESSION

11:30 AM - 12:45 PM

## WINNING TRUST

In today's world, the increase of hyper-connection, growing involvement in virtual realities, and the widening of the interpersonal and cultural fissures have made developing relationships of trust increasingly difficult. To address the "Lead" aspect of the LEAD-THINK-PLAN-ACT framework, this session will provide participants insights into new research that will help them lead collaborative strategy formulation and build their communication and facilitation skills. This session will introduce a new model of confidence building measures developed from analysis of over 2,500 soldier interviews of their experiences in Iraq and Afghanistan as they worked by, with, and through partner military forces in dynamic and high-stakes multi-cultural contexts. Overall, this session will provide unique insights into how to build trust and establish high trust networks among people/organizations who are unfamiliar with one another and have different cultural perspectives and viewpoints.



**DR. AARON BAZIN**

Fulcrum LLC - U.S. Special Operations Command

Dr. Bazin adds value to organizations by helping them explore the possibilities of the future and develop unique, visionary strategies. He is a skilled researcher, facilitator, presenter, and writer. Aaron has an established reputation as a creative, friendly, and hardworking professional with a positive attitude and the entrepreneurial drive needed to lead teams to success. He is the author of over 30 articles and the book, "Think: Tools to Build Your Mind."

# 75 MINUTE SESSION

11:30 AM - 12:45 PM

## CAPITAL CROSSROADS: CASE STUDIES IN MULTI-JURISDICTION PLANNING AND ACTION

Capital Crossroads is a collaborative, regional strategic plan designed to help the Central Iowa region think bigger and work together. Centering on ten focus areas, Capital Crossroads is one of the most aggressive, comprehensive and effective plans nationwide.

Director Nikki Syverson will share how Capital Crossroads engages nearly 20 regional municipalities to cooperate, define goals and set policy to benefit the broader region. Best practices will be shared on how to gain buy-in, engage multiple stakeholders and collaboratively enact change.



**NIKKI SYVERSON**  
Capital Crossroads

As Capital Crossroads Director, Syverson leads the vision plan and volunteers to help the Central Iowa region reach its potential. Syverson has more than 15 years of experience in nonprofit management, fundraising and strategic planning serving in leadership roles at the Des Moines Community Playhouse, Wine Festival Foundation of Des Moines and the Des Moines Symphony Orchestra. She has also served on numerous boards and committees throughout the region. In both her professional and volunteer roles she has a proven track record of improving organizations' financial positions, improving community relations and connecting new partners for larger gains

# 75 MINUTE SESSION

11:30 AM - 12:45 PM

## USING COLLABORATIVE SCENARIO DEVELOPMENT TO ANTICIPATE YOUR FUTURE BUSINESS ECOSYSTEM

Scenarios are purpose built for today's complex and turbulent business ecosystem. So, why does scenario planning remain a largely misunderstood and under utilized resource in the strategic planning kit-bag?

Using multiple case studies, this session will provide an original and accessible approach to scenario planning which de-mystifies the complexity of scenarios and has proven effective in achieving optimal organisational impact.

Key aspects of this approach include:

- An emphasis on collaborative scenario and strategy development which mobilizes the creative and entrepreneurial capabilities that lie within every organisation
- The integration of strategy formulation and implementation to maximize execution effectiveness
- A unique approach to process design and facilitation which recognizes the central role of the participant in scenario planning success
- and the importance of 'bringing everybody along'
- Translating scenarios to long-term organisational strategic frameworks and shorter-term implementation plans which tie anticipation of the future business ecosystem back to organisational priorities

Attendees will walk away from this session empowered to employ more effective and impactful scenario planning practices to help their clients achieve the future they want for their business.



**STEVE TIGHE**  
Chasing Sunrises

Steve Tighe is one of Australia's leading advisors to business on the future, strategy and innovation.

He is the former Foresight Manager at Foster's, has a Masters in Strategic Foresight from Swinburne University and has completed the Oxford Scenarios Programme at Oxford University.

Steve has worked with some of the world's leading organizations, including General Motors, Kraft and Aristocrat Technologies, looking at the future of their industry and the strategic and innovation options for their business.

Steve's ability to generate original and distinct strategies for his clients through the use of scenario planning has been recognized by The Association for Strategic Planning with an Honorable Recognition in the 2014 Richard Goodman Strategic Planning Awards (Non-Profit).

Steve's book, Rethinking Strategy: How to anticipate the future, slow down change and improve decision making will be released in May 2019 (Wiley Publishing).

# KEYNOTE

1: 45 PM - 2:30 PM

## Planning for the Unknown: How Resource Planning Processes Can Inform Strategy in the Face of Uncertainty

This talk is about Patterns of Strategy, a revolutionary approach which is effective and simple to use, yet extremely powerful. It leverages the increasingly complex competitive and collaborative relationships between organizations: competitors, partners, regulators and the marketplace. It provides a framework and new vocabulary to understand the underlying forces driving strategic relationships and emergent strategy. You'll understand how emergent strategy emerges, and how to model, understand and harness its forces to your advantage to achieve the strategic fit you want. It can also model the dynamics of a business ecosystem – how different organizations are likely to move relative to one another – which provides an added way to predict and influence the likely future state of your strategic environment. The patterns provide a toolkit for designing strategies, with a catalogue of about 100 proven strategies, and there are also patterns at an ecosystem level. We'll illustrate with examples and cases throughout the talk.



**PATRICK HOVERSTADT**  
Fractal Consulting

Patrick Hoverstadt has worked as a consultant since 1995 in both the private and public sectors, in 14 countries, mainly in the fields of strategy, organizational structure and change. He specializes in working with very large complex organizations including whole sectors, using systems approaches. Patrick is the author of “Fractal Organization” (Wiley 2009), co-author of “Systems approaches to Managing Change” (Springer 2010) and “Patterns of Strategy” (Gower 2017) as well as numerous papers. He has lectured at post-graduate level at 7 business schools and is a Visiting Research Fellow at Cranfield School of Management.

# 75 MINUTE SESSION

4:15 PM - 5:30 PM

## CREATING AND SUSTAINING A NONPROFIT COLLABORATION - A CASE PRESENTATION

Get an inside look at a model community collaboration built to identify and address the health needs of two large and growing counties in the Kansas City metropolitan area. Topics include an honest appraisal of what it takes to get a collaboration off the ground (spoiler alert: addressing the What's In It For Me-must be part of the conversation) and hard won lessons on what it takes to sustain the structure and momentum of a collaboration. Gary Zaborac, Director Clay County Public Health Center and one of the founders of Northland Health Alliance, with Denise McNerney, President- iBossWell, Inc. (NHA Project Consultant /Facilitator) will share insights about:

- The long and winding road to collaboration
- Collaboration infrastructure
- Ensuring engagement
- Establishing consensus and creating action
- Overcoming the accountability speedbump

Northland Health Alliance is gaining national recognition for the success of its health collaboration and the impact its efforts are having on the community. This discussion is an opportunity to hear a story from the front lines about what worked, what didn't, and where they're going from here.



**GARY ZABORAC**

Clay County - Public Health Center

Gary is the Director of Public Health for Clay County, Missouri. He has over 33 years of experience in Public Health practice. Gary led the Clay County Public Health Center to become one of the first 100 health departments in the United States to achieve national accreditation with the Public Health Accreditation Board (PHAB). He recently served as Immediate Past Chair of the Missouri Association of Local Public Health Agencies (MoALPHA). He also is the past Vice Chair and current Treasurer of the Missouri Center for Public Health Excellence. He is a member of the Clay County Economic Development Council's Strategic Planning Committee. He is currently serving as Chair of Liberty Community Health Action Team, a community collaborative promoting healthy lifestyles in Liberty, MO. Gary currently serves as President of the Northland Health Alliance, a collaborative partnership of 11 health care agencies dedicated to improving the health of Northland residents in Clay and Platte Counties.



**DENISE MCNERNEY**

iBossWell, Inc. & ASP

Denise McNerney is CEO of iBossWell, Inc. a strategic planning, organizational change, and leadership development consulting firm, focusing on developing and aligning vision, tactics and organizational culture; working principally in the nonprofit and government sector. Denise has more than 30 years experience with efforts that have had positive impact on the bottom-line of hundreds of organizations and the lives of individuals within. She is the co-author of the book "The PeoplePACT™ - Achieving Exemplary Performance through Humane Leadership." She has presented and published extensively, and recently, with the Association for Strategic Planning (ASP), spearheaded the first ever national scope survey on successful practices in strategic planning and management in nonprofits. She is also President-elect for ASP's Board of Directors and chairs their Center for Excellence in Nonprofit Strategy. Denise has a BS in Pharmacy and an MA in Counseling, with additional work towards a PhD in Counseling Psychology.

# 75 MINUTE SESSION

4:15 PM - 5:30 PM

## BALANCING BUSINESS ECOSYSTEMS WITH COLLABORATIONS

In today's world, organizations are seeking to make a difference above and beyond the financial gain and customer value their products or services provide. Equally important for many organizations, is the ability to impact the people in the community and the environment. Understanding how collaborations drive performance is critical in developing successful strategies for business development, growth and sustainability. Foundations, Non-Profits, Non-Government Organizations and Social Cause entities recognized the value of collaborative efforts and have integrated the concept in their business model to support their causes. Reduction in resources have driven more and more businesses to look at what efforts will have the most impact on the achievement of their goals. This presentation will help you

identify internal and external collaborations, critical components of successful collaborations, how to include collaborations as part of your strategy development and execution and how to evaluate the success of a partnership.



**JULIETTE BASTIAN**  
Balanced Scorecard Institute

Juliette has over 30 years of experience with Government, Non-Profit, & Private Sector organizations and is a certified Balanced Scorecard Master Professional. She excelled in special projects, working with elected officials, and served as San Bernardino County's Clerk of the Board; the first African-American appointed to that position in California. Her experience includes strategic planning leadership for a private non-profit community action agency as well as other executive and management level positions. Her responsibilities have included management consulting, communication, change management, organizational development, special projects, and representation for local government entities at the state and national levels.

Juliette is certified by BSI and The George Washington University College of Professional Studies as a Balanced Scorecard Master Professional (BSMP), Balanced Scorecard Professional (BSP) and Key Performance Indicators Professional (KPI-P); she holds certifications in various business-related topics from the American Management Association (AMA) and is a Certified Public Official. She maintains professional memberships in the Association for Strategic Planning (ASP) & CEO Space, International. Juliette has a Bachelor's degree in Business/Accounting, Cal State University San Bernardino and resides in Corona, California.

# 75 MINUTE SESSION

4:15 PM - 5:30 PM

## Self Funding Transformation from Direct to a Collaborative Business Model

Transforming your business model from a direct to customer based approach to a collaborative business model does not have to come from your bottom line or balance sheet! Join the session to learn more about delivering incremental value to the organization while also driving targeted efficiencies to fund the transformation and continue to deliver the financial results.



**HARSIT PATEL**  
ADP, LLC

As a senior executive with over 18 years of leadership experience, Harsit Patel has provided strategy as well as execution leadership for industry leaders such as ADP, eBay and IBM to drive growth and targeted business outcomes.

In his current position as Vice President of Strategy, Business Development and Operations with ADP, he is responsible for incubating and scaling a collaborative business model that leverages key macro trends in the enterprise B2B tech space such as accelerating cloud migrations, improved standards based connectivity, increasingly open ecosystems, services automation etc. His focus has not only been on strategy formulation and measuring truly incremental value of the results, but also on building cross functional teams, partnerships, and technology delivery in support.

Harsit strives on analyzing complex unstructured issues, formulating strategy for them, and driving subsequent cross functional execution to deliver tangible customer, shareholder and employee outcomes. His passions are firmly at the intersection of business strategy, technology and transformation, and he enjoys connecting with like-minded individuals and organizations.

# PANEL DISCUSSION

9:00 AM - 10:00 AM

## HARNESS THE POWER OF PEOPLE FOR A FUTURE-PROOF STRATEGY

Everyone is talking about the impact of technology, from giant tech companies becoming too powerful, to what jobs will be taken over by Artificial Intelligence. As organizations struggle to define technology strategies that will deliver competitive advantage, it is vital to shed light on the future of people and organizations.

The panel features a future oriented discussion that links people, organizations, technology and strategy implementation together. The discussion will focus on a number of questions:

- What kinds of collaborative skills are called for in complex business ecosystems linked by technology platforms?
- What is or is not changing in how leaders prepare their people and define their organizations' culture in this unprecedented wave of technological change?
- What would be the impact of technology on the human side of transformation in organizations and vice versa?
- Are the organizations and the workforce changing in a way that fit the future?

**PANELIST INFORMATION COMING SOON!**

# KEYNOTE PRESENTATION

10:00 AM - 10:45 AM

Techstars Sustainability Accelerator in partnership with The Nature Conservancy, based in Denver, Colorado, is a unique partnership that was initiated by Mark Tercek (CEO TNC), Brian McPeck (President TNC), Brad Feld (Foundry Group) and Techstars. It's a startup accelerator for for-profit companies backed by several impressive mission-aligned investors including Zoma Capital, Lucas Walton, Lyda Hill, and Grantham Hannelore Environmental Trust.

In this talk, you'll learn about the power of collaboration between Techstars, The Nature Conservancy, and mission-aligned impact investors.



**HANNAH DAVIS**

Techstars Sustainability Accelerator

Hannah cares deeply about community and the power to create positive impact in the world through business. She is the Program Director at the Techstars Sustainability Accelerator in partnership with The Nature Conservancy in Denver Colorado. Techstars is the worldwide network that supports entrepreneurs and with this powerful partnership she supports startups focused in solving challenges in water, food and climate markets.

Before joining Techstars, Hannah was the Program Director at MergeLane, a fund that invests in companies with at least one woman in leadership. Prior to MergeLane, she was an integral force at the Impact Hub Boulder, a co-working space for community and socially-focused businesses. She helped grow both these organizations from ideas to hundreds of community members.

Hannah lives in Boulder, Colorado. She's an avid mountain biker, skier, and backpacker. Originally from Maine, she earned her B.A. from the University of Vermont with a double major in Economics and Environmental Studies.

# 75 MINUTE SESSION

1:45 PM - 3:00 PM

## INNOVATION STRATEGY: FROM IDEA TO PRODUCT, LEVERAGING UNIVERSITY INNOVATION SYSTEMS

How do organizations survive and thrive in the disruption economy? The radical shift in today's business paradigm is a catalyst for greater innovation and the formation of new alliances. To weather and outmatch their competition, organizations need to construct strategies with attainable results. Yet organizations often fail to tap critical resources to endure rapidly changing external climates that are often in their own backyard. Universities carry vast IP and research portfolios that organizations can access and leverage with the right strategies.



**GLORIA NEGRETE**

University of California San Diego

Working within UC San Diego's Research Affairs Office of Innovation and Commercialization as the Director of Strategy and Planning, Gloria Negrete serves in a key position directing strategy for engagement. Additionally, she is the founding director of The Basement, an incubator for the UC San Diego campus that runs accelerator programming. The Basement, recently ranked by the San Diego Business Journal among the top ten 2018 incubators and accelerators in San Diego, California; began as an initiative to broadly support the entrepreneurial interests of the campus. In her role, Gloria leads the full spectrum of strategy, planning, development, and direction of programs focused on innovation and entrepreneurship that are designed to engage regional and global constituencies as well as corporate interests. A major focus of Gloria's work is to direct annual initiatives and programs established to connect industry and the community with UC San Diego's innovation ecosystem.

For over eight years, Gloria has worked in directing and managing business related centers and programs in higher education. She is a former university faculty member with a communications, business, and arts background. Her expertise includes experience working with both tech and non-tech startups for well over ten years. She ran her own business as a consultant and is a published writer. As an advocate for equity, diversity and inclusivity, Gloria integrates strategies to encourage and engage each in the innovation and entrepreneurship programming she oversees. She was recently selected to serve as a UC San Diego Leaders for Equity Advancement and Diversity, Fellow. LEAD Fellows undergo extensive training to lead and promote diversity and excellence across the UC San Diego campus. Gloria is passionate about building collaborative communities and Co-founded, COLLAB, the Collaboration of Likeminded Learners and Builders. COLLAB is a maker council for UC San Diego and local educators involved in creating opportunities for the maker community.

# 75 MINUTE SESSION

1:45 PM - 3:00 PM

## ENABLING A COMPREHENSIVE CONTINUITY STRATEGY

Every day there's a story about the impacts of weather, political upheaval, and violence on businesses and communities. If your company experiences one of these events, can it continue to deliver and at what cost? What is the ultimate impact of an event on your company's ability to achieve its strategic outcomes? To say it differently, how would your company weather the storm?

Most strategic plans consider risks to the overall business strategy; however, does your strategic plan include addressing the risk of a business disruption to assets, staff, customers, and ongoing operations? Does your company have a business continuity strategy that is up to date and tested?

Learn how one company developed and implemented a comprehensive business continuity strategy on a shoestring budget. Examine how they incorporated various support systems, multiple physical locations and a diverse supply chain. See how you can use the same change management principles to develop your business continuity strategy and integrate the program into your organization's workforce routine. Templates to create a business continuity analysis and plan are provided.



**LAURET HOWARD**  
Watchtower Consulting

NASCO is owned by six large BlueCross Blue Shield (BCBS) Plans and, as NASCO's Chief Risk Officer prior to her recent retirement, Lauret ensured processes are in place to protect the personal health information of 24 million BCBS members. She was accountable for NASCO's enterprise risk management (ERM) program to assess, identify, monitor and reduce pertinent business risks that could prevent NASCO from achieving its objectives and goals. She was also responsible for ensuring that NASCO is in compliance with its internal operating policies and procedures and with any external legal, regulatory or contractual requirements. Lauret led several risk and security assessments that resulted in a plan to close gaps such that NASCO achieved its SOC2 and HITRUST certifications well ahead of most companies in the healthcare IT industry. During her 30 years at NASCO, Lauret created and led its consulting practice, served as Chief Financial Officer and facilitated NASCO strategy development and execution. Lauret is in the process of launching Watchtower Consulting, focusing on business and risk management strategy development and implementation planning.

# 75 MINUTE SESSION

1:45 PM - 3:00 PM

## THE BUSINESS ARCHITECTURE APPROACH TO FORMULATE AND IMPLEMENT A STRATEGY THAT LEVERAGES THE BUSINESS ECOSYSTEM

To be competitive and thrive in today's global market, organizations must formulate and implement a strategy that leverages their business ecosystem. The objective of this talk is to propose a definition of strategy that accounts for this ecosystem and to present a business architecture approach that organizations should use to make the most of this ecosystem. More precisely, this talk will (1) show how organizations can use this approach to analyze their internal environment, business ecosystem and strategy alternatives during strategy formulation; and (2) show how it can help them become more effective and efficient at building new capabilities and leveraging those present in their business ecosystem during strategy implementation.



**Pierre Hadaya, Ph.D.**

ESG UQAM - Université du Québec à Montréal

Pierre Hadaya Ph.D., is a full professor at the School of Management of the Université du Québec à Montréal. His main research interests are strategic planning and management, organizational transformation, corporate governance, business architecture as well as the strategic alignment of IT. As cofounder of ASATE Group Inc., Mr. Hadaya also collaborates with organizations striving to formulate, implement and execute a winning strategy so they can develop and maintain a competitive advantage.