

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT



Self Assessment Workbook: Level II

The Association for Strategic Planning's

Body of Knowledge For Certifying Strategic Management Professionals (SMP)

BEST PRACTICES



Strategy Management Group

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

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*Association for Strategic Planning's Body of Knowledge Component for Certifying
Strategic Planning Professionals and Strategic Management Professionals*

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Professionalism

“Whatever is worth doing at all is worth doing well.”

—Lord Chesterfield

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This Body of Knowledge Level II workbook was designed by the Association for Strategic Planning Core and Extended Core Program Teams.

This Body of Knowledge Level II workbook was designed and produced by Joyce Evans, Manager of Products and Services of the Haines Centre for Strategic Management.

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Program Introduction

A vision and mission were the starting point for the Association for Strategic Planning’s development of this Body of Knowledge to guide the professional certification of planning professionals in the United States as well as internationally. We hope that this becomes the world-wide industry standard.

This document was developed by a Core Team of eight highly skilled ASP senior level professionals (names below) who were supported by an Extended Team of 14 other senior level professionals.

Leanna Blackmon’s critical skills helped us in making it all come together.

We also are indebted to our corporate sponsors for their support for this vital project:

**Delta Community Credit Union—Sundt Corporation
Washington Suburban Sanitary Commission
Haines Centre for Strategic Management—Balanced Scorecard Institute**

However, the data and opinions used in developing this document came from interviews we conducted with over 20 other planning certificate or certification programs in both the private and academic sectors in keeping with the ASP overall mission of whom we serve. In addition we asked for the ideal future vision from the ASP Chapters as well as the ASP Board of Directors and members of both our Core and Extended Teams. We were pleased to have the opportunity at the ASP 2009 Annual Conference in San Diego for further critique and views on the details of this Body of Knowledge.

Signed:

Terry Schmidt

Frank Mruk

Steve Haines

Sara Brann

Richard Condit

Jim McComb

Gail Aller-Stead

Tom Carter

Howard Rohm

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Business Acumen

1. Lead

- 1.1 Personal Credibility
- 1.2 Interpersonal skills

2. Think

- 2.1 Content
- 2.2 Processes
- 2.3 Infrastructures

3. Plan

- 3.1 Content
- 3.2 Processes
- 3.3 Infrastructures

4. Act

- 4.1 Content
- 4.2 Processes
- 4.3 Infrastructures

5. Strategic Planning Professional Foundation

- 5.1 Professional Roles

Level II

Strategic Business Acumen

1. Strategic Leader

- 1.3 Planning Teamwork
- 1.4 Cross-Functional Teams
- 1.5 Organization-Wide

2. Strategic Thinking

- 2.4 Content
- 2.5 Processes
- 2.6 Infrastructures

3. Strategic Planning

- 3.1 Content
- 3.2 Processes
- 3.3 Infrastructures

4. Strategic Action

- 4.4 Content
- 4.5 Processes
- 4.6 Infrastructures

5. Strategic Management Professional Foundation

- 5.2 Professional Roles

Note: The terminology used here applies to all kinds of organizations—private, public, military, and not-for-profit, as well as internal and external roles within those organizations. However, when terms such as “corporate” are used in this document, they are meant to apply to all these kinds of organizations.

VI. Think—Plan—Act Bibliography

- Strategic Thinking
- Strategic Planning
- Strategic Action and Change

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Certification Program Process

Based on the vision and mission, the Strategic Planning Certification Credentials were developed with a number of components:

1. **Market Needs**—an extensive survey was conducted with ASP members regarding their wants, desires, and benefits of planning certification. The results included a resounding “yes” to this need.
2. **Best Practices Research**—a detailed set of interviews were conducted with over 20 firms and universities to ensure a best practice Body of Knowledge for the 21st Century. Also the certification development process itself included interviews and process reviews with over 10 other excellent associations such as PMI, SHRM, ASTD, etc. so as not to reinvent the wheel.
3. **Phase I**—to develop a best practice Body of Knowledge in the Strategic Planning Field (embodying ASP’s Think—Plan—Act mantra) for both Levels I and II below.
4. **Phase II**—to develop an ongoing certification process that would include these components
 - ◆ Body of Knowledge exams with an ethics consideration
 - ◆ Registered Educational Providers (REPs) to provide the education
 - ◆ Independent governance structure
 - ◆ An application process and criteria that take into account an applicant’s life, jobs, experiences and education
 - ◆ Administrative support to run the day-day certification program for ASP
 - ◆ Independent Testing Service
5. This project has been supported by extensive outreach and inclusiveness to everyone interested in this project, soliciting their feedback, critiques, and recommendations to improve the result.

Results—Credentialing at these Levels of Professionalism

1. Strategic Planning Professionals (SPP)—Level I
2. Strategic Management Professionals (SMP)—Level II
3. Strategic Planning Apprentice (SPA) Designation

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Our Body of Knowledge represents current best practices in the field of Strategic Planning and is the result of interviewing the best 20+ firms and advanced educational institutions we could collectively identify that teach Strategic Planning in some form. In addition, we reviewed their course purposes, benefits, and agendas where these existed.

These organizations were identified collectively by our seven Core Project Team Members and our roughly 20 Extended Team Members. We were able to identify everything that was being taught in 2008-09 that is relevant in the 21st Century. This Body of Knowledge is what these many organizations, senior level professionals and faculty members collectively believe represents a set of reasonable, common sense, and important knowledge about Strategic Planning that if properly applied, would lead to significantly improved organizational results.

It is organized under the rubric of Think—Plan—Act that is the identity of our Association.

Since the first draft, this Body of Knowledge has undergone extensive review, critique, and revisions to represent a consensus version of the desired knowledge required by successful practitioners, both within and outside of ASP.

Our final review will be with an Advisory Board of Pioneers consisting of the most distinguished professionals in the field who are members of ASP. This will be the final check on our work and is part of the Pioneers developing the two testing exams (questions and answers).

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Year 2012 Vision of this Certification Program

We have a rigorous and prestigious global level ASP Strategic Planning Body of Knowledge, and certification for individual planning professionals (both ASP members and non-members).

This certification is recognized as the best in the Strategic Planning and Strategic Management Field, and is clearly distinguishable from any other certification or certificate program.

Year 2010 Certification Program Vision Details

- ◆ This certification and its Body of Knowledge establish best practices and clear professional standards.
- ◆ The certification program is based upon objective criteria that covers the full set of knowledge associated with the Body of Knowledge (BOK) of Think—Plan—Act in Strategic Planning.
- ◆ This certification recognizes expertise gained from appropriate life and work experiences.
- ◆ ASP's BOK and certification process will be established using rigorous criteria, which include in keeping with the standards of the national organizations that offer certification programs.

Year 2009-2012 Mission of this Certification Program

This certification program enables ASP members and non-members to become highly knowledgeable and skilled professionals in Strategic Planning (Think-Plan-Act), and to be recognized as such.

2009-2012 Mission details

- ◆ To improve the quality of Strategic Planning as a profession. The field has a mixed reputation because many old traditional practices are still followed that do not work well.

Expectations and Rough Profiles for the Levels of ASP Certifications

I. LEVEL II—Strategic Management Professional (SMP)

1. At least five years experience in planning as an internal/planner or external consultant participating or leading multiple strategic planning assignments.
2. Holds the Strategic Planning Professional (SPP) credential or meets all of its requirements.
3. Demonstrates mastery of the entire ASP Body of Knowledge through REP courses/PDUs.
4. Works with C-Level Executives and their teams.
5. Uses the full Body of Knowledge and facilitates getting the organization to its desired outcomes.
6. A strategic and systems thinker who regularly applies systemic thinking and skills.
7. Is an advocate for the full field of Strategic Planning and all its Lead-Think-Plan-Act components.
8. Demonstrates strategic leadership in an organization, sector, or the strategic planning field.

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Level Two Certification
STRATEGIC MANAGEMENT PROFESSIONALSM (SMP)



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BUSINESS ACUMEN

As we said in the Introduction, professional planners must also have a high degree of **business acumen** and technical/content knowledge about the industry and sector in which they are working. However, this business acumen is not a simple and universal set of Standards common to every organization.

Therefore, we have elected NOT to attempt to build a common set of business acumen standards, but rather have the Certification Process include the applicant’s demonstration of this important factor in their life and career experiences.

Some of these business acumen areas might include, but are not limited to the following (illustrative only):

HOW DO YOU EVALUATE YOURSELF?

I.	Executive Presence	(L)ow	(M)ed	(H)igh	Comments
	Professionalism				
	Confidence with CEOs				
	Communication Skills—oral and written				
HIGH TOTALS::					/out of 3
II.	Customer	(L)ow	(M)ed	(H)igh	Comments
	Sales/Pricing				
	Marketing				
	Merchandising/Placement				
	Advertising/Promotion				
	Customer Service/Complaints				
	Information/Data				
	Branding				
HIGH TOTALS:					/out of 7

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III. Finances	(L)ow	(M)ed	(H)igh	Comments
Financial Analysis/reading Financial Statements				
Accounting				
Budgeting				
Treasury/Cash Management				
Capital Financing				
Regulatory Compliance				
Global Finance				
Consumer Finance				
Mortgage Banking				
Insurance				
Investment Banking				
				HIGH TOTALS: /out of 11
IV. Technology	(L)ow	(M)ed	(H)igh	Comments
Computers and IT				
Telecommunications				
Other Technology				
Knowledge Management				
Information Management				
Research and Development				
				HIGH TOTALS: /out of 6
V. Products and Services	(L)ow	(M)ed	(H)igh	Comments
Engineering				
Design of Products/Life Cycle				
Product and Service Knowledge				
Manufacturing				
Innovation and New Product Service/Development				
				HIGH TOTALS: /out of 5

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VI.	Delivery/Logistics/Process	(L)ow	(M)ed	(H)igh	Comments
	Supply-Chain Management				
	Purchasing				
	Distribution/Warehousing				
	Delivery Channels				
	Process Management				
	Operations				
	Outsourcing				
	Benchmarking				
HIGH TOTALS:					/out of 8

VII.	Administration	(L)ow	(M)ed	(H)igh	Comments
	Legal Matters				
	Safety				
	Administration				
	Facilities				
	Regulatory Compliance				
HIGH TOTALS:					/out of 5

VIII.	Human Resources	(L)ow	(M)ed	(H)igh	Comments
	Talent Management				
	Recruiting/Selection				
	High Performance Development/Improvement				
	Compensation/Benefits				
	Labor/Union Relations				
	Cultural Influence/Issues				
	Development and Succession/Training				
	Ethics Management				
	Regulatory Compliance				
HIGH TOTALS:					/out of 9

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IX.	Environmental Scanning	(L)ow	(M)ed	(H)igh	Comments
	Business and Competitor Scanning and Intelligence				
	Global Marketplace				
	Suppliers/Venders				
	Sector Dynamics				
	Competition/Substitutes				
	Customers				
	Industry Dynamics				
	Strategic Alliances				
	Trend Tracking/Research				
					HIGH TOTALS: /out of 9
X.	Research Methods	(L)ow	(M)ed	(H)igh	Comments
	Knowledge about Databases				
	Internet Research				
	Source Evaluation and Verification				
	Use of Competitor Intelligence				
					HIGH TOTALS: /out of 4
XI.	Society Acumen	(L)ow	(M)ed	(H)igh	Comments
	Citizenship and Governance				
	Community Actions/Leadership				
	Political Campaigns				
	Government Agencies				
	Social Responsibility				
	Peacemaking				
	Environmentalist				
	Special Interest Groups				
	Government Planning				
	Content Production				
	Course Development				
					HIGH TOTALS: /out of 11

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XII.	Thought Leadership	(L)ow	(M)ed	(H)igh	Comments
	Use of Competitor Intelligence				
	Think Tank Activity				
					HIGH TOTALS: /out of 2
XIII.	Cross-Cultural Communications	(L)ow	(M)ed	(H)igh	Comments
	Second Language Fluency				
	Multi-year Residence in more than one country				
	Multi-Country Business Experience				
	Implementation of Cross-Cultural Change Management				
	Sensitivity and Knowledge of Cultural Custom				
					HIGH TOTALS: /out of 5
XIV.	Strategic Management	(L)ow	(M)ed	(H)igh	Comments
	Strategic Thinking				
	Strategic Planning				
	Strategic Change				
					HIGH TOTALS: /out of 3

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Business Acumen Summary					
Section		# Of Highs	Out Of	Total Percentage	Comments
I.	Executive Presence	/	possible 4 =	%	
II.	Customer	/	possible 7 =	%	
III.	Finances	/	possible 11 =	%	
IV.	Technology	/	possible 6 =	%	
V.	Products and Services	/	possible 5 =	%	
VI.	Delivery/Logistics/Process	/	possible 8 =	%	
VII.	Administration	/	possible 5 =	%	
VIII.	Human Resources	/	possible 9 =	%	
IX.	Environmental Scanning	/	possible 9 =	%	
X.	Research Methods	/	possible 4 =	%	
XI.	Society Acumen	/	possible 11 =	%	
XII.	Thought Leadership	/	possible 2 =	%	
XIII.	Cross-Cultural Communications	/	possible 5 =	%	
XIV.	Strategic Management	/	possible 3 =	%	
Grand Total		/	possible 89	%	

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Our Body of Knowledge Framework

There are five fundamental components that together make up this BOK Framework. They represent the standards that planning professionals must know in order to be credentialed by the Association for Strategic Planning and warrant the use of our certification credential and designation.

These “Components” include

- 1. Think-Plan-Act**—ASP has adopted “**Think-Plan-Act**” as its mantra and framework for strategic planning. This then becomes our framework for the Body of Knowledge in this Certification Program because planning in the 21st Century is now recognized for what it is: PLANNING FOR CHANGE. Our goal is that there are no more planning functions contributing to the SPOTS Syndrome—the Strategic Plan on the Top Shelf...gathering dust.
- 2. Lead**—Planning and change are the **primary jobs of leaders** in all organizations; including the planning profession to which this certification is aimed. For this reason, leadership is required for good planning/change professionals. **Staff leaders do not lead organizations.** They provide leadership, **support, coaching, advice, guidance, facilitation, logistics,** and staff functional expertise to the line executives who lead the organization.
- 3. Strategic Planning Reality**—In addition, the Field of Systems Thinking and Organization Effectiveness and Change view that every situation in life has three components occurring at the same time. This is the reality of life and sometimes called The Iceberg Theory (see next page).
 - 1). The **content** of the Think-Plan-Act discussions
 - 2). The **processes** themselves that are going on during the Think-Plan-Act discussions
 - 3). The **infrastructures** or context within which the Think-Plan-Act occurs
- 4. Business Acumen**—Professional planners must also have a high degree of **business Acumen** and technical/content knowledge about the industry and sector in which their organizations compete. However, this business acumen is not a simple and universal set of standards common to every organization and sector. Therefore, we have elected NOT to attempt to build a common set of business acumen standards in our BOK, but rather have the certification process assess the applicant’s knowledge of this important factor through their life and career experiences.
- 5. Foundation**—A key fundamental, often overlooked, that is crucial to a successful professional is being an expert on their role. This is especially confusing in many organizations between roles of Board of Directors, CEO, Collective Senior Management Team, Line and Division Management. Failure to know and follow this Foundation and clarity of the respective roles “*builds in failure up front.*” Setting the roles clearly and properly “*engineers success up front.*”

Body of Knowledge Terminology

Final Exam Issues And Terminology:

Please note the below items which, after working through the SMP exam Questions and Answers, some important clarifications should be kept in mind.

1) **Terminology.** Please utilize non-bias terminology as follows:

a. Profit/Nonprofit Neutral: Replace the term "Corporation" "Company", "Firm" or "Nonprofit" with "Institution" or "Organization" or "Enterprise" whenever possible.

b. Western/Eastern Neutral: Please keep references appropriate for a global audience.

c. Gender Neutral: Please keep references gender neutral.

d. The term "chief executive" is preferred to CEO which is private sector usage. The public sector and not-for-profits have terms like Executive Director, Superintendent, etc. so we think chief executive is the most generic term (no capitals either).

2) **Strategic Planning Terminology:** We are trying to create a clear and concise use of standard terms in the Strategic Planning Field and believe the below to be a consensus of the final Exam Team's understanding:

a. Emphasize Strategic: Replace the terms "Management" or "Planning" with "Strategic Management" or "Strategic Planning" whenever possible as this is a Strategic Planning Association and Certification.

b. The term Strategic Plan is preferred rather than just Strategic Direction unless there is no Strategic Plan.

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c. The term “Strategy” is defined as the high level, more strategic Content in the Strategic Plan rather than the Strategic Planning Process, so be careful of the frequent misuse of this “Strategy” term.

d. The term “Strategy”(singular) is also used by some to define the **primary means** , or the “strategies (plural) to achieve the Vision”.

e. Strategy is also used as defining the **end or result** as in THE STRATEGY (Singular). Preferably here as an end would be terms such as “Competitive Advantage/Edge” or “Positioning” instead.

3) It is important to note that **Test Question Typologies** include "Case Studies" and "Diagram Interpretation" Questions. All Questions are then placed in a "four Multiple Choice" framework. No True/False Questions and Answers.

4) It is also very important on where and how Strategic planning and Strategic Management is **located** in the organization. The Roles section of the BOK is very important and its clarity should be emphasized in your preparation. It was agreed that:

a. The "Strategic Planning Function" is generally housed in the "**Strategic Management Department/Office**" of an Organization with responsibilities for Lead-Think-Plan-Act as per the BOK. (remember Lead is a staff leadership or advisory role—not chief executive leadership).

b. The Strategic Management Department/Office is generally led by the "Chief Strategy Officer (CSO)". This CSO is a term we would like to make a standard in the Field just like CFO, CAO, CLO, CIO, etc. so it gets the same respect.

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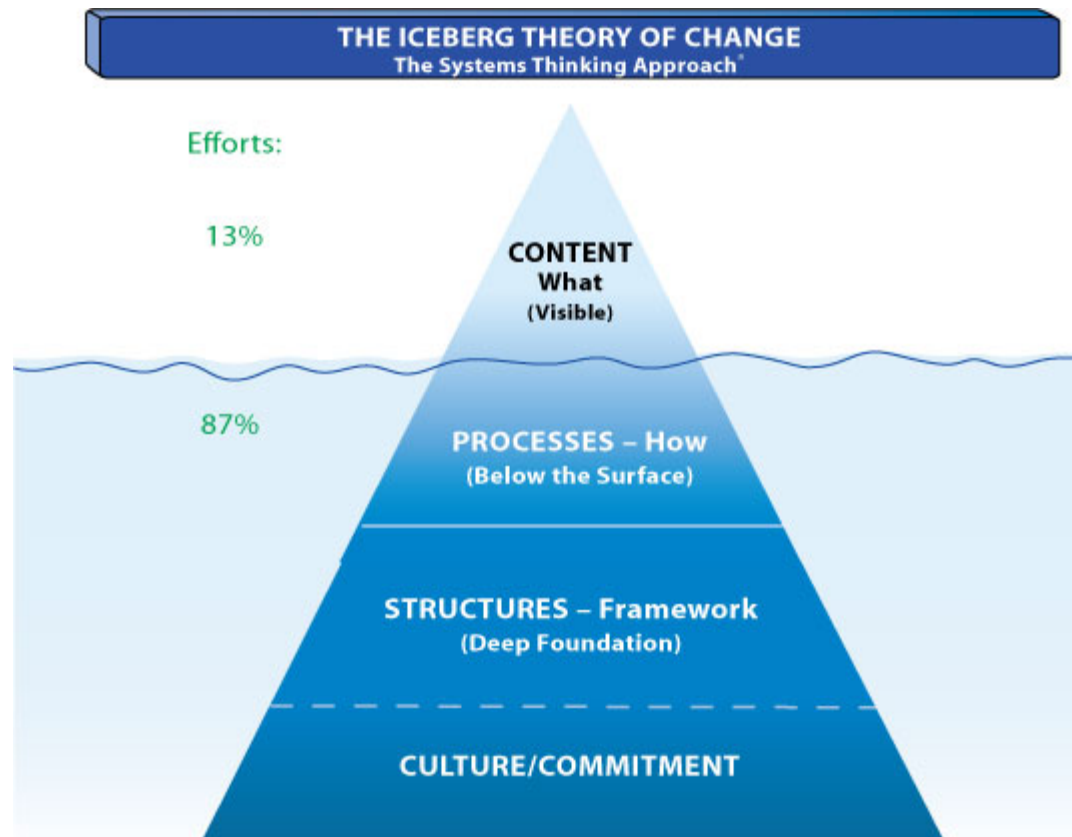
The Resulting Credentials: Education

Level #1: Strategic Planning Professionals (SPP)—requires the Think-Plan-Act and our first two levels of leadership in our BOK (1.1 and 1.2) as well as some level of business acumen.

Level #2: Strategic Management Professionals (SMP)—requires knowledge in our entire BOK (Think-Plan-Act), be a strategic leader, and have more extensive and strategic business acumen.

Strategic Planning Apprentice (SPA) Designation—requires the same knowledge as our SPP above but not the Business Acumen. The SPA is required to pass the SPP BOK examination. Any Business Acumen is a plus.

The Iceberg Theory



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The Iceberg Theory reflects the natural reality of everyday life. Present in every interpersonal situation in life are three elements: **Content, Processes, and Structure**. Creating high performance organizations requires a balance in how organizations spend their time and energy on these three elements.

CONTENT—ELEMENT #1

Task, goal, and focus of the business are its content—or what the strategic plans and change projects are all about. This is the easiest element to see and understand.

However, below the surface of the water, an iceberg has 87 percent of its mass. So, too, it is with action and change. It is what is not visible and out of balance of missing that will kill successful change—namely, the processes and structures of our interactions.

Content myopia (focusing on content alone) is the failure by leaders to focus on the strategic planning processes and structures. This is naive since action and change are dependent on them both.

PROCESSES—ELEMENT #2

Capabilities involved in our planning interactions are the “how to’s” of behavior while working on our tasks/content above. For example, if bubble gum is the content, chewing is the process by which we extract the juices that make it enjoyable. In other words, chewing is the process and gum is the content. The “process” is how we implement the strategic plan. This is demonstrated by the rollercoaster of change later in this BOK.

This Rollercoaster is “natural, normal, and highly predictable”— and all the fundamentals you need to know about the process of change.

STRUCTURES—ELEMENT #3

Infrastructures for thinking—planning—actions and change are the least understood as they are the deepest part of the iceberg and are often taken for granted. We rarely even acknowledge their existence despite the fact that the structures are the context, vessels, or arrangements within which all process and content operate. These are the biggest leverage place for actions and change to occur successfully.

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Planning for Change: The Rollercoaster

Strategic Planning is “planning for change” in an entire organization. Hence the other construct needed here—the five levels that exist in any organization:

Level 1: Personal Creditability

Level 2: Interpersonal Relationships

Level 3: Functional Teams

Level 4: Cross-functional Teams

Level 5: Organization-wide

Since strategic planning is “planning for change” that takes action to be different and better than the present state, the Think—Plan—Act process will unleash the Rollercoaster of Change. Life is full of cycles and cycles of change and is the reality of life for us all; not just planners and executives. If you understand the Rollercoaster, then the actions and change are “*natural, normal, and highly predictable.*” This allows the planner and executive to be proactive in successfully executing their strategic plan.

Change is an individual, emotional, and psychological matter for each of us. The bigger the organization, the more difficult it is apt to be to get everyone to change and focus on the customer. Instead, the focus may be on oneself. Thus, productivity, quality, and other results take a nose dive. Things will almost always get worse before they get better is a fact! The “Rollercoaster of Change” is a term coined a number of years ago for the phenomenon that occurs and is written about in many fields and disciplines, including mental health (Virginia Satir, William Bridges, Harry Levinson, Stephen Haines, and Ken Blanchard).

This rollercoaster is a simple way of understanding the dynamics of how to effect successful strategic planning and its implementation (action and change). Cycles of “stability—change—instability—new stability—and change all over again” are normal and natural.

Basically, you must manage and lead yourself first, and only then, help others through the stages of the rollercoaster. Keep in mind, though, that everyone goes through these stages at different rates, depths, and times.

THE ROLLERCOASTER OF CHANGE

This Individual and Psychological Rollercoaster is “Natural – Normal – and Highly Predictable”



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LEAD – LEVEL II					
1. Strategic Leader—Level II					
1.3 Strategic Leader in Planning Teamwork (Think—Plan—Act)—Level II					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
1.3.1	Practice participative strategic management office management through involving others and building consensus				
1.3.2	Facilitate the thinking, planning and implementation work of groups in meetings, task forces, and department teams				
1.3.3	Educate managers, employees, and teams (regarding thinking, planning, and implementation)				
1.3.4	Guide and support communication with department management and employees about the Strategic and Annual Plan to ensure “buy-in” for implementation				
1.3.5	Lead an effective Strategic Management Office (SMO) of both management and employees alike as a Chief Strategic Officer (CSO)				
1.3.6	Promote better Strategic Management Office problem-solving and decision-making as a role model for the organization				
HIGH TOTALS:					/out of 6

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1. Cross Functional Strategic Leader (Think-Plan-Act)—Level II					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
1.4.1	Create, charter, and support cross-functional teams , projects, and task forces				
1.4.2	Support and integrate business processes based on anticipating and delivering customers' wants and needs for quality products and services				
1.4.3	Institutionalize strategic thinking tools and critical thinking across functions in a more holistic and effective manner				
1.4.4	Manage planning processes effectively through sound project management skills				
1.4.5	Foster a culture of innovation and strategic thinking throughout the organization				
1.4.6	Foster networking, knowledge transfer and the development of a learning organization across the entire organization				
HIGH TOTALS: /out of 6					

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1.5 Organization-Wide Strategic Leader (Think-Plan-Act)—Level II					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
1.5.1	Support the organization's vision , values, and competitive position in the marketplace and strategies to achieve them throughout the organization				
1.5.2	Support organization design professionals and senior management to effectively redesign and restructure the organization chart to align it with the strategic plan for day-to-day responsibility and accountability				
1.5.3	Coordinate communications of strategic content through senior management and communications staff relying on a range of channels and methods				
1.5.4	Align planning and implementation tasks with the accountability for their achievement at all levels				
1.5.5	Support cultural change and transformation to create a customer-focused, high performance, adaptive organization				
1.5.6	Organize and design the change management infrastructures and change processes of the organization to smooth out strategic plan implementation and effective change management				
1.5.7	Be a change agent/advocate and advisor to management during strategic implementation				
1.5.8	Assist the organization in being flexible and adaptable to changing environments, demands, and deadlines				
1.5.9	Guide effective sourcing, application and sharing of knowledge and learning across the organization				
1.5.10	Ensure that the underlying business model and processes for the organization are aligned with the desired changes arising from the strategic plan and its implementation				
HIGH TOTALS:					/out of 10

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2. Strategic Thinking—Level II						
2.4 Strategic Thinking Content—Level II						
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments	
2.4.1	Provide strategic intelligence to senior management to lead competitive advantage and strategy discussions, ending with consensus decision-making, where possible					
2.4.2	Evaluate different strategic alternatives to create a uniqueness that creates value for their customers and a competitive advantage for the organization					
2.4.3	Assist senior management with the development of their vision and mission/purpose, core values and long range direction for the future					
2.4.4	Assist senior management with value chain management analysis, sustainable value chains , and business models that drive entrepreneurial behavior					
2.4.5	Link strategic thinking with strategic budgeting to ensure a focus on the future and opportunities vs. sunk costs					
2.4.6	Guide the dissemination of acquired knowledge to the entire organization in a form that is useful					
HIGH TOTALS:					/out of 6	

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
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2.5 Strategic Thinking Processes – Level II						
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments	
2.5.1	Conduct strategic deliberations through an understanding of group dynamics, personalities, facilitation, asking good questions, and assisting consensus and closure					
2.5.2	Challenge existing assumptions and confront the logic of all involved, including senior executives					
2.5.3	Facilitate conflict-management in order to persevere through difficult discussions and chronic issues that have no easy answers					
2.5.4	Assist senior management with redefining industry boundaries if necessary, including scenario planning or modeling to transform and create new market space					
2.5.5	Assist senior executives in identifying the unintended consequences within every strategic discussion in the complexity of today’s world					
2.5.6	Provide a systemic approach to strategic thinking during future environmental scanning and clarify the desired outcomes before moving forward with any analysis, problem-solving or decision-making					
2.5.7	Teach the senior management first, the rest of management second, and the entire workforce third in thinking strategically as a better way to be strategic on a daily, weekly, monthly, and yearly basis					
HIGH TOTALS:					/out of 7	

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2.6 Strategic Thinking Infrastructures—Level II					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
2.6.1	Design a Strategy Management Office to guide the strategic thinking—strategic planning—strategic implementation processes				
2.6.2	Design a strategic management system and yearly cycle as a way to run the business day-to-day, week-to-week, month-to-month, and year-to-year while thinking dynamically and tuned to the frequencies of the business				
HIGH TOTALS:					/out of 2

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3. Strategic Planning—Level II						
3.4 Strategic Planning Content—Level II						
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments	
3.4.1	Facilitate the art of strategy identification , evaluation, and selection					
3.4.2	Guide the creation of a marketplace competitive advantage and how to strengthen it					
3.4.3	Influence the strategic direction and vision of the organization as well as the determination of core strategies to achieve this direction					
3.4.4	Cascade goals and core strategies into corporate-wide annual top priority strategic action items and annual department plans to achieve these goals/core strategies					
3.4.5	Ensure that a yearly strategic management system integrates with the corporate budgeting and financing processes as well as HR Rewards and Recognition Systems					
3.4.6	Articulate the importance of brand/reputation and support the development of plans to strengthen this					
3.4.7	Assess market opportunities, strategic alliances, and new business development challenges					
3.4.8	Create viable and mutually exclusive strategic alternatives and best strategies using carefully chosen criteria					
3.4.9	Facilitate a thorough financial analysis of the organization’s financial health and human resources					
HIGH TOTALS:					/out of 9	

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3.5 Strategic Planning Processes – Level II						
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments	
3.5.1	Focus the organization on the most critical issues to address					
3.5.2	Facilitate a top management planning team process led by the CEO that appropriately involves the Board of Directors and other key internal and external stakeholders					
3.5.3	Build necessary relationships across countries, cultures, languages and continents with global sensitivity, awareness and sophistication					
3.5.4	Facilitate effective decision-making processes in plan development					
3.5.5	Facilitate a process to uncover and clarify the organization’s core competencies and any gaps					
HIGH TOTALS:					/out of 5	

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3.6 Strategic Planning Infrastructures—Level II					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
3.6.1	Install a timely pre-planning process to “ engineer success upfront ” in the planning process				
3.6.2	Set up a planning infrastructure whereby the core planning team is led by the CEO and includes all members of senior management within a manageable size so they can be productive				
3.6.3	Install a Strategy Management Office structure/staff person(s) to guide the strategic planning (Think—Plan—Act) process				
3.6.4	Coordinate and integrate specific structural linkages between strategic plans and operating plans for appropriate performance, results, and associated rewards				
3.6.5	Develop specific frameworks and structures to build, review, and evaluate the links between the corporate strategic plan and strategic business units with three-year business plans				
3.6.6	Coordinate a merger/acquisition process or system for the organization				
HIGH TOTALS:					 /out of 6

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4.4 Strategic Action Content – Level II						
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments	
4.4.1	Ensure that change theories and their application to the organization are taught and applied at all levels of management by subject matter experts including knowledge of behavioral science principles and change management applications					
4.4.2	Facilitate a line of sight for the organization’s goals and objectives across/down the entire organization					
4.4.3	Facilitate changing the culture of management and employees					
4.4.4	Facilitate ways to motivate and incentivize people					
4.4.5	Foster innovation in new product/services development					
4.4.6	Ensure that effective controls and evaluation systems are in place					
4.4.7	Ensure that a Code of Ethics has been developed and is properly communicated and enforced with all employees					
HIGH TOTALS:					/out of 7	

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4.5 Strategic Action Processes—Level II					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
4.5.1	Follow best practices in change management and overcoming resistance to ensure that the change initiative succeeds				
4.5.2	Obtain the commitment of the board, CEO, senior management, and middle management to lead, and support the strategic change				
4.5.3	Guide senior management in understanding the impact of change on all aspects of the organization and the need to appropriately “keep up the pressure” for change so employees don’t slip back to old routines				
4.5.4	Facilitate the development of a change game plan that can be fully supported by senior management before the formal change and implementation process begins				
4.5.5	Facilitate reward and accountability systems at all levels to support the change initiative				
4.5.6	Assist senior management in making effective critical decisions to drive change based on valid information and objective analysis				
HIGH TOTALS:					/out of 6

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4.6 Strategic Action Infrastructures – Level II						
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments	
4.6.1	Ensure that the needed rewards and recognition structures for the new strategic direction are in place and reinforced at all levels of the organization					
4.6.2	Facilitate an organization-wide Change Leadership Team that is led by the CEO, supported by the Strategy Management Office, and meets monthly. The purpose of the Team is to lead tracking, reporting, adjusting, communication, and follow up of the strategic plan implementation					
4.6.3	Set up and run a Strategy Management Office to coordinate the entire strategic plan change effort in support of the CEO and Change Leadership Team					
4.6.4	Identify and install other change infrastructures/teams (such as an Employee Development Board, IT Steering Group, Facilities Management Team, etc. as appropriate)					
4.6.5	Guide the horizontal integration of strategies and strategic initiatives across functions					
					HIGH TOTALS:	/out of 6

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5.2 Strategic Management Professional Roles—Level II					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
5.2.1	Define the role of the Strategic Planning & Strategic Management Professionals in Strategic Planning (Lead-Think-Plan-Act)				
5.2.2	Explain the roles of the key others the Strategic Planning Professionals and Strategic Management Professionals will interact with, including the Board of Directors, CEO, Sr. Management Team, Line Managers and SBUs				
5.2.3	Explain the terminology, definitions and framework of the different components of the field of Strategic Planning (Lead-Think-Plan-Act)				
5.2.4	Ensure the clarity, roles and relationships of Strategic Planning Professionals and Strategic Management Professionals and their internal and external clients				
5.2.5	Ensure the keys to engineer success “up front” are met in successful strategic planning and implementation				
HIGH TOTALS:					/out of 5

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SUMMARY				
		# of Highs	Out of	Total Percentage
1.3	Strategic Leader in Planning Teamwork (Think—Plan—Act)—Level II	/	possible 6 =	%
1.4	Cross Functional Strategic Leader (Think-Plan-Act)—Level II	/	possible 6 =	%
1.5	Organization-Wide Strategic Leader (Think-Plan-Act)—Level II	/	possible 10 =	%
2.4	Strategic Thinking Content—Level II	/	possible 6 =	%
2.5	Strategic Thinking Processes – Level II	/	possible 7 =	%
2.6	Strategic Thinking Infrastructures—Level II	/	possible 2 =	%
3.4	Strategic Planning Content—Level II	/	possible 9 =	%
3.5	Strategic Planning Processes – Level II	/	possible 5 =	%
3.6	Strategic Planning Infrastructures—Level II	/	possible 6 =	%
4.4	Strategic Action Content – Level II	/	possible 7 =	%
4.5	Strategic Action Processes—Level II	/	possible 7 =	%
4.6	Strategic Action Infrastructures – Level II	/	possible 6 =	%
5.2	Strategic Management Professional Roles – Level II	/	possible 5 =	%
	Grand Total:	/	possible 82 =	%

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**Acknowledgment of Participation -
For
The ASP Certification Project: 2008-2009**

The Association of Strategic Planning (ASP) would like to acknowledge its gratitude and “Thank You” for the sponsoring organizations who supported the development of our ASP Certification Program.

I. Sponsors for the ASP National Standards and Certification Program include:

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RECOMMENDED BIBLIOGRAPHY FOR EXAM PREPARATION:

(Depending on your needed areas of improvement)

Current Literature

- Strategic Leadership
- Strategic Thinking
- Strategic Planning
- Strategic Action and Change

Classic Literature

Three Recommended Simple Steps To Taking Your Exam

1. Do a self-assessment versus the Body of Knowledge for your desired Strategic Management Professional, Strategic Planning Professional, or Strategic Planning Apprentice Exam.
2. Based on your self-assessment and your strengths and weaknesses, we recommend:
 - a. Reading books from the attached list that eliminate your weaknesses
 - b. Attending Qualified Registered Educational Providers (REPs) courses listed on the Association for Strategic Planning's website to eliminate your weaknesses as well.
3. Apply for, be approved, take your exam, and become certified.



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ASP Body of Knowledge Statements Summary

Level I			Level II		
Point		# of Statements	Point		# of Statements
LEAD – 15% (24 questions)			LEAD – 25% (40 questions)		
1.1	Lead in Personal Credibility	7	1.3	Strategic Leader	6
1.2	Lead in Interpersonal Relationships	9	1.4	Cross-Functional Strategic Leader	6
			1.5	Organization-wide Strategic Leader	10
THINK – 25% (40 questions)			THINK – 15% (24 questions)		
2.1	Think Content	9	2.4	Strategic Thinking Content	6
2.2	Think Processes	7	2.5	Strategic Thinking Processes	7
2.3	Think Infrastructures	4	2.6	Strategic Thinking Infrastructures	2
PLAN – 25% (40 questions)			PLAN – 25% (40 questions)		
3.1	Plan Content	10	3.4	Strategic Planning Content	9
3.2	Plan Processes	9	3.5	Strategic Planning Processes	5
3.3	Plan Infrastructures	6	3.6	Strategic Planning Infrastructures	6
ACT – 25% (40 questions)			ACT – 25% (40 questions)		
4.1	Action Content	6	4.4	Strategic Action Content	7
4.2	Action Processes	5	4.5	Strategic Action Processes	6
4.3	Action Infrastructures	7	4.6	Strategic Action Infrastructures	5
ROLES – 10% (16 questions)			ROLES – 10% (16 questions)		
5.1	Strategic Planning Professional Roles	5	5.2	Strategic Management Professional Roles	5
Total	160 questions	84	Total	160 questions	80