

SPP Content Outline and Knowledge Needed for Competent Performance

Domain 1 ENGAGEMENT		Knowledge Needed for Domain 1 Competence
1A	CULTURE OF STRATEGIC MANAGEMENT AND AGILITY	<p>Knowledge Needed for Domain 1 Competence</p> <ul style="list-style-type: none"> • Knowledge and application of Strategic Management Philosophy <ul style="list-style-type: none"> • Elements of a strategic management function • How to think with a systems perspective • How to design agile planning and strategy management processes • How to cascade strategy and goals throughout the organization • How to assure alignment to the strategy through synthesis of top down and bottom up planning • How to apply change management principles that best fits the organization • How to implement change structures, processes and culture needed to transform an organization • How to leverage the role and importance of executive sponsorship • Knowledge and application of organizational performance models and how to choose the best fit model <ul style="list-style-type: none"> • How to assess strategic options in relation to desired outcomes • How to design processes that garner buy-in for strategic change • How to create a culture of accountability and learning • Knowledge and application of communication methods to share knowledge and learning <ul style="list-style-type: none"> • How to communicate complex ideas at middle management level <ul style="list-style-type: none"> • How to select communication strategies and methods to align strategy across the organization • How to communicate the design of the process at various stages and to the various levels of the organization • How to teach and coach middle managers to enhance communication skills • How to assess and use fact-based data to drive decisions • How to engage internal and external stakeholders to assure buy-in and stay-in to the planning process <ul style="list-style-type: none"> • How to motivate people to share information and knowledge (actionable understanding) in cross-functional teams • How to draw out lessons learned into actionable understanding • Knowledge and application of interpersonal and group process facilitation skills <ul style="list-style-type: none"> • How to demonstrate executive presence and emotional intelligence <ul style="list-style-type: none"> • How to create credibility at the middle management level • How to build relationships at the middle management level • How to coach the middle manager <ul style="list-style-type: none"> • How to affirm people while delivering a range of feedback, i.e. corrective, constructive feedback. • How to facilitate group processes <ul style="list-style-type: none"> • How to facilitate focused planning sessions
1A1	Drive tactical and project planning within a business unit in alignment with the overall strategic plan.	
1A2	Support a culture of strategic management, agility, and accountability.	
1A3	Facilitate the creation of unit planning at all levels.	
1A4	Support unit personnel through cycles of change.	
1A5	Facilitate processes to identify and agree upon strategic option	
1A6	Facilitate strategic planning reviews to continuously improve the business and department planning processes.	
1A7	Design and deliver enterprise-wide training to support the strategic direction.	
1A8	Design strategy evaluation and improvement to be a continuous rather than periodic process.	
1B	PLANNING TEAM EXPECTATIONS	
1B1	Assist a corporate planning team to ensure that the knowledge, timing, outcomes, processes, and infrastructures of planning and strategic management achieve organization-wide integration.	
1B2	Orient assembled planning team to the planning process.	
1B3	Provide actionable feedback to support planning team members so team members perform optimally individually and as a unit.	
1B4	Advise leaders on how to involve and communicate the value of change to staff to minimize resistance.	

		<ul style="list-style-type: none"> • How to listen and synthesize input into the process design • How to bring a conversation to resolution • How to inject innovative thought into solution-seeking • When and how to resolve conflicts among middle management • How to provide meaningful, constructive feedback to planning groups • How to apply various motivational theories to keep advancing plan development and execution <ul style="list-style-type: none"> • How to motivate middle managers toward planning activities • How to engage staff at various levels to minimize resistance • Knowledge and application of multi-cultural inclusion <ul style="list-style-type: none"> • How to be effective in a multi-cultural environment • How to be cross-culturally competent • How to select the members for an effective planning team
Domain 2 STRATEGY FORMULATION		Knowledge Needed for Domain 2 Competence
2A	INTERNAL AND EXTERNAL ENVIRONMENTAL SCAN	<ul style="list-style-type: none"> • Knowledge and application of various approaches to external and internal environmental scanning <ul style="list-style-type: none"> • How to apply appropriate categorizations for change drivers (e.g., PESTEL, STEEP) <ul style="list-style-type: none"> • How to use scenario planning to assess strategic options • How to identify the core competencies of a business unit • How to apply various approaches to SWOT analysis and select the appropriate approach for the organization <ul style="list-style-type: none"> • How to conduct an effective SWOT analysis of organization-wide processes, structures and culture in light of the new strategies and to close gaps between current and desired future state • Knowledge and application of various theories around strategy design (e.g., scenario planning, Porter's Five Forces, etc.) and how to select the most appropriate for the organization <ul style="list-style-type: none"> • How to communicate the differences between mission, vision and purpose • How to segment a customer base • How to create a compelling value proposition for the customers of the organization • How to leverage creativity and innovation to enhance customer value • Knowledge and application of data collection and analysis processes and tools <ul style="list-style-type: none"> • How to conduct data analysis <ul style="list-style-type: none"> • How to interpret and make sense of SWOT data to select the most relevant aspects to achieve optimal performance • How to identify, gather and assess usefulness of data from internal sources • How to leverage strengths and assets to achieve desired performance. • How to identify barriers and risks to strategy implementation • How to make sense of data to project its likely impact to customers and on the organization itself • How to convert research findings into actionable understanding
2A1	Collect and disseminate information about the organization's resources to assist with the development of the strategy plan.	
2A2	Facilitate analysis of internal processes for efficiency and effectiveness.	
2A3	Monitor and assess the current internal and external environments.	
2A4	Identify relevant customer segmentation attributes in collaboration with appropriate marketing personnel.	
2A5	Contribute to plans for how the key environmental indicators are communicated.	
2A6	Provide benchmarking and best practice research	
2A7	Review and analyze customer satisfaction data and intelligence regarding wants, needs, loyalty and retention.	
2A8	Assist in evaluating readiness or capacity for change and ensure recommended changes are informed by findings.	
2A9	Communicate data, both written and orally, to create actionable understanding.	
2B	STRATEGY DESIGN AND FORMULATION	

2B1	Support creation of and articulate the organization's distinctive core competencies and value proposition that result in a competitive differentiation.	<ul style="list-style-type: none"> • How to use a variety of approaches assess customer satisfaction • How to construct surveys to collect objective, unbiased data understanding <ul style="list-style-type: none"> • How to construct survey items that would effectively assess customer intelligence that can be leveraged in scenarios and product decisions in alignment with the strategic plan. • How to recognize relevant benchmarks <ul style="list-style-type: none"> • Knowledge and application of communication tools and skills <ul style="list-style-type: none"> • How to get buy-in organization-wide <ul style="list-style-type: none"> • How to select and implement different types of feedback loops (e.g., experiential data) • How to use available communication tools, select and use the appropriate tool • How to organize, synthesize and disseminate information in written and oral communication. • How to create a business case for strategic alternatives <ul style="list-style-type: none"> • How to present rationale for relevant options • How to present strategies that result in competitive differentiation effectively and confidently to middle management while facilitating discussion and decision-making • Knowledge and application of interpersonal and group facilitation skills <ul style="list-style-type: none"> • How to identify and appropriately attune to key audiences (e.g., their dynamics, culture, etc.) • How to identify and appropriately attune key audiences (e.g., their dynamics, culture, etc.) to the strategy <p>How to engage others in creating options</p>
2B2	Assist in the formulation of the vision and mission statements to be clear in defining the organization's purpose.	
2B3	Support comprehensive economic and portfolio analysis of tentative/alternative strategic directions to ensure their viability, growth, and sustainability.	
2B4	Assist with industry and organizational structural analysis.	
2B5	Advise on options to grow top line revenue and lower costs to improve cash flow and increase profit margins.	
2B6	Assist in the development of appropriate feedback loops to validate strategy options	
Domain 3 PREPARATION FOR STRATEGY INTEGRATION		Knowledge Needed for Domain 3 Competence
3A	ALIGNMENT OF THE ORGANIZATION DESIGN WITH STRATEGY	<ul style="list-style-type: none"> • Knowledge and application of different approaches to organizational design (e.g., human centered design, LEAN thinking, etc.) <ul style="list-style-type: none"> • How to apply relevant organization design frameworks available • How to apply form follows function to redesign the structure of the organization to accommodate the strategies chosen • Knowledge and application of various modes of external and internal environmental scanning <ul style="list-style-type: none"> • How to assess internal resources in service to the strategic plan <ul style="list-style-type: none"> • How to identify critical internal and external stakeholders to engage in the strategy execution process • How to engage finance and IT personnel to gather information to inform the resource plan for implementation
3A1	Educate middle management on organization design/ redesign principles and its relationship to the success of strategy execution and management.	
3A2	Identify organization structures affected by the proposed strategy.	
3A3	Support organization design professionals and middle management to redesign the organization and align it with the new strategy.	
3A4	Plan and sequence changes transpired from organizational redesign.	

3A5	Enable employee engagement and attunement of their hearts and minds in support of the strategic direction.	<ul style="list-style-type: none"> • How to identify and quantify the capital resources, technology and capabilities required to execute the activities and tasks required to move from current to future state <ul style="list-style-type: none"> • How to assess gaps in training needs • How to engage HR professionals to design and use effective, learner-focused training through a variety of settings, i.e. virtual, webinar, face to face • How to analyze and identify gaps presented in the current culture and the current operational processes towards the desired state • How to identify the activities and tasks required to move from current to future state • How to map the shift from the current organization chart and corporate cultural components and what it needs to be
3A6	Assess the impact of organization design to corporate culture and recommend mitigation for gaps.	
3B	ALIGNMENT OF OPERATIONS WITH STRATEGY	
3B1	Facilitate the alignment of enterprise-wide operational plans with the organization strategy.	
3B2	Assess internal operational processes to identify actions necessary to close the gap between the current state and desired state.	
3B3	Assess what capital resources, technology or capabilities are needed to implement the strategy.	
3B4	Promote the value of organizational changes that support strategy development and execution.	
3C	OPERATIONAL PLANNING FOR IMPLEMENTATION	
3C1	Assist the management team in developing a clear strategic change agenda, common framework, and language.	
3C2	Facilitate the development of an actionable plan from the organization's strategies.	
3C3	Identify specific activities and resources needed to realize the organization's strategies.	
3C4	Help to build and create management ownership of a viable operational plan for change.	
3C5	Determine and recommend allocation of resources, finances and timelines for each activity.	
3C6	Integrate, communicate, and cascade all the strategic planning components into an annual planning and budgeting process across and down the entire organization.	
3C7	Leverage, align, and cascade the business strategy into multi-year business plans for departments and major functional areas.	<ul style="list-style-type: none"> • Knowledge and application of different functional levels of planning <ul style="list-style-type: none"> • How to identify the interdependencies of the transformation projects and how to properly sequence them • How to facilitate development of the strategic change agenda, common framework and language across various levels of the organization • How to construct SMART objectives • How to create a tactical plan for implementation and execution <ul style="list-style-type: none"> • How to connect tactics and actions with strategies. • How to facilitate transition planning <ul style="list-style-type: none"> • How to create a transition plan • How to sequence transition planning activities • How to plan a robust performance monitoring system <ul style="list-style-type: none"> • How to select an integrated portfolio management system that coordinates with product management and financial systems. • How to communicate to programmers on how to customize portfolio system features to align with enterprise needs • How to collaborate with appropriate departments to create a training plan and a communications plan enterprise-wide to support teamwork in pursuit of the strategy plan. • How to create multi-year departmental business plans <ul style="list-style-type: none"> • How to link elements of the strategic plan to the multi-year business plans • How to collaborate with appropriate department and functional managers to cascade the business strategy into multi-year business plans • Knowledge and application of change management principles <ul style="list-style-type: none"> • How to develop and implement a change management program • How to apply principles of change management and integrate them into the design plan • How to educate middle managers to understand change management and assist them in intervening at various stages in response to change • Knowledge and application of project management principles

3C8	Identify desired outcomes for each activity.	<ul style="list-style-type: none"> • How to apply project management principles, techniques, and tools • How to identify the resources and competencies required for each project (e.g., staff, IT, etc.) • How to facilitate sequencing the priorities • Knowledge, skills and strategies to facilitate engagement and buy-in <ul style="list-style-type: none"> • How to engage finance and IT personnel to prioritize the strategy resource plan • How to engage appropriate organization design professionals • How to engage stakeholders toward execution of the strategy plan <ul style="list-style-type: none"> • How to effectively educate and coach middle management in both implementation and execution <ul style="list-style-type: none"> • How to engage middle management in the operational planning and strategy execution to assure buy-in, stay-in for organizational redesign • How to use different models to facilitate prioritization in a group setting (e.g. Delphi) • How to facilitate development of a team and teamwork <ul style="list-style-type: none"> • How to influence project and change management teams • How to facilitate cross-functional teams to enhance organizational capabilities <ul style="list-style-type: none"> • How to facilitate cross-functional team discussion around portfolio information needs among business units. • Knowledge and application of communication tools and strategies <ul style="list-style-type: none"> • How to develop and select communication strategies and methods to engage employees to understand and embrace the strategic direction • How to assist middle managers to use relevant communication tools and techniques to communicate plans throughout their business unit.
Domain 4 STRATEGY EXECUTION AND EVALUATION		Knowledge Needed for Domain 4 Competence
4A	STRATEGY EXECUTION AND TRANSFORMATION	<ul style="list-style-type: none"> • Knowledge and application of how to govern the execution of the plan and process <ul style="list-style-type: none"> • How to create a governance plan • How to design and implement the hierarchical structure for decision-making related to the plan • How to develop appropriate policies to support the hierarchical structure • How to train and communicate to middle management to assure consistent procedures are followed • How to monitor, identify gaps and report on the consistency of decision-making to appropriate parties and recommend corrective action • Knowledge and application of how to deconstruct the strategic plan into annual plans of work • How to identify strategic planning components to integrate into annual planning and budgeting processes
4A1	Facilitate the development of annual and project plans that align with the strategy.	
4A2	Engage with critical internal and external stakeholders in the strategy execution process.	
4A3	Guide development of strategic and transition planning activities throughout the organization.	
4A4	Assist in the development and implementation of a change management program that informs and engages stakeholders.	
4A5	Recommend a portfolio management system to support the process by which strategic plan initiatives are selected, executed, and monitored.	

4A6	Serve as the trusted advisor to project teams and change management teams as they implement the strategic initiatives.	<ul style="list-style-type: none"> • Knowledge and strategies to create a performance culture <ul style="list-style-type: none"> • How to select and apply relevant performance management systems (i.e. Balanced Scorecard) • How to select and apply a variety of models of success metrics (e.g., SMART, OKR, KSMs) • How to identify relevant metrics and measures of success for the strategic plan <ul style="list-style-type: none"> • How to develop measurable performance metrics and targets tied to the desired outcomes • How to design and use a monitoring function consistent with the level of organizational and business plan complexity <ul style="list-style-type: none"> • How to assure the strategy plan impacts work at all levels of the organization • How to design performance reporting systems (e.g., dashboard) • How to collect and assess feedback on the strategy implementation and execution <ul style="list-style-type: none"> • How to capture and assess feedback that could lead to changes to the plans • How to apply lessons learned from the change management evaluation • How to collaborate with appropriate personnel to identify and implement changes required to performance-based systems • How to facilitate a strategy review meeting using performance data <ul style="list-style-type: none"> ▪ How to prioritize the interventions for corrective action <ul style="list-style-type: none"> • How to intervene appropriately and course correct to realize performance outcomes • Knowledge, strategies and tools to monitor and respond to performance results <ul style="list-style-type: none"> • How to analyze performance drivers • How to collect and assess key performance data and trends that reflect on strategy execution relative to the future state and established performance projections • How to forecast the impact to strategy execution based on performance • How to use performance metrics and feedback loops to assess risks to strategy execution • How to conduct regular reviews and validations of strategic decisions and change management process (e.g., double loop learning) • How to design, implement and deploy strategy performance dashboards • How to develop mitigation strategies and tactics for identified gaps • How to apply appropriate interventions given a specific stage in the cycle of change • Knowledge, strategies and skills to facilitate group engagement <ul style="list-style-type: none"> • How to engage appropriate middle management and gain commitment to the plan <ul style="list-style-type: none"> • How to facilitate development of performance projections • How to facilitate implementation of an annual review process that drives continuous improvement • How to facilitate solution-seeking to recalibrate processes for improved performance. • Knowledge of and application of interpersonal communication skills and use of communication tools <ul style="list-style-type: none"> • How to cultivate and sustain a trust relationship
4A7	Assist management in developing and executing an annual implementation and review process that drives continuous improvement.	
4A8	Teach and coach teamwork, change management, and project management skills to support strategy implementation.	
4A9	Anticipate changes that can impact or support the successful execution of the strategy.	
4B	GOVERNANCE AND DECISION MAKING	
4B1	Support creation of a governance plan.	
4B2	Guide management to adhere to the established governing structure and decision hierarchy for modifications in their plans.	
4C	STRATEGIC PERFORMANCE MANAGEMENT	
4C1	Facilitate management in identifying the performance metrics and targets for strategic initiatives.	
4C2	Design and report strategy performance dashboards and identify information sources.	
4C3	Facilitate strategy review meetings.	
4C4	Support communications to managers and employees about progress being made towards achieving the strategy.	
4C5	Evaluate the KPI data and trends to determine if strategies are on track and identify improvements	
4C6	Evaluate the change management effectiveness.	

		<ul style="list-style-type: none">• How to apply relevant communication tools and techniques for various audiences• How to collaborate with appropriate internal personnel, including change agents, to roll out communications enterprise-wide• How to create reporting and communication processes about decisions made regarding the plan and changes to it<ul style="list-style-type: none">• How to capture and communicate lessons learned
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