



Handbook

Strategic Planning Professional (SPP) Strategic Management Professional (SMP) Candidates and Interested Professionals



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WELCOME TO IASP CERTIFICATION!

PART I: OVERVIEW OF IASP CERTIFICATION

Strategy is a profession, not simply a task that organizations check off the list of things to do. A lot rides on the quality of facilitated strategy sessions. The function requires high-level skills, business acumen, and competency in the field of strategy. How do you know if you've got what it takes to set your organization or your clients in a direction of relevance, profitability and sustainability in this dynamic period of change? I A S P has taken the initiative to create consistency and a benchmark for competency in our profession.

The Association for Strategic Planning (ASP) is the only global strategy association with a certification program. The purpose of our program is to establish a high-level of quality and consistency within the fields of strategic planning and management so that strategic planners and those responsible for developing and deploying strategy can assist organizations in meeting and exceeding the challenges of the 21st century. Certification is based on the published competencies that are drawn from Job Analysis Research which is conducted every five years. The competencies are derived from actual tasks performed by people in strategy roles.

ASP offers two certifications, the Level I Strategic Planning Professional (SPP) and the Level II Strategic Management Professional (SMP). Seeking certification is not restricted to IASP membership; non-members are eligible to apply for Certification.

ASP's family of credentials is driven by sound theory and practice in the strategy profession. The competencies identified set the baseline standard of knowledge that every strategy professional should have at their fingertips.



1.0 WHO SHOULD CONSIDER IASP CERTIFICATION?

- C-Suite executives in business, non-profit and government who engage regularly with strategy planning.
- Senior operational leaders responsible for business units who are engaged at the strategy table.
- Consultants who facilitate client strategic planning in the business, non-profit or government sectors.
- Finance leaders who are involved with financial strategy.
- Strategic marketing and branding professionals who engage in strategic alignment of a brand.
- Project managers (PMPs) who need strategy credentials.
- Human resource managers who are involved in talent development strategy.

2.0 WHY WOULD YOU WANT TO GET CERTIFIED BY IASP?

Motivation for learning is different for everybody. Do you identify with any of these statements?

- I want to be at the top of my game.
- I feel that my relevance is slipping away.
- I need to get up to speed.
- I want to bring more value to my organization.
- I need more confidence in strategy planning.
- I want to feel like I know what I'm doing.
- I've been assigned a strategy job that I have no background in. The stakes are too high to mess up!
- I have a lot of on-the-job experience and applied business acumen. I want to validate that for my resume.



In this time and place, how can we ever really prepare ourselves for the uncertainty that we face today? Most of us learn on the job. When we learn this way, we grab the pieces of the puzzle that will solve our challenges quickly. But we only grab a piece of the puzzle. How do you learn that the rest of the puzzle may be more relevant than the piece you grabbed just to get you through?

Achieving IASP certification is a signal to the world that you know what you are doing in the field of strategy. Earning the designations of SPP or SMP and the privilege to put these letters after your name symbolizes that you understand the “thousand-piece puzzle” of strategy—not just the 50-piece beginner puzzle.

It is the study process—the preparation—where the intrinsic value is for you. Holding that inner confidence that you know the best practices and methodologies in the field is powerful.

Knowing that you can take your company's strategy planning to the next level creates value. Demonstrating that you meet the required competencies to attain the designation is a personal achievement.

3.0 WHAT DO THE CERTIFICATION EXAMS TEST FOR?

The examinations assess competencies in four domains: Engagement, Strategy Formulation, Preparation for Strategy Integration, and Strategy Execution, Governance and Evaluation. The facilitative role that strategy professionals play underlies each of these domains. As a result, knowledge and application of facilitation skills is incorporated into the exam.

The content outline for your chosen level of examination is the primary document to reference in your study. You can view these competencies on the IASP website at www.strategyassociation.org/Certification/Taking the Exam

The current competencies are also identified in Appendix C of this Handbook.

While there are many books and workshops that can contribute to your knowledge level, the most current version of the Body of Knowledge (BOK 3.0) is an essential companion for all those pursuing IASP certification. The BOK offers a common language and set of best practices and approaches in strategy management.

IASP also has developed a set of flashcards to help you review strategy concepts and theories that may be referenced on the exam. These can be ordered from the IASP store at www.strategyassociation.org.

4.0 WHICH CERTIFICATION SHOULD I PURSUE—SPP OR SMP?

Choosing which credential to pursue is a matter of experience and education in strategy. Check the eligibility requirements below to determine your best avenue to pursue.



4.1 Strategic Planning Professional (SPP)

To qualify to take the SPP exam, candidates must demonstrate they have experienced one of the following eligibility paths:

- 5 years of work experience with your primary responsibilities in the area of strategic planning and strategic management
- 5 years working as a manager with at least one year having your primary responsibilities in a strategic planning and strategic management function
- 2 years of work experience in those areas plus eligible education (covering at least two areas of these four strategic planning domains – engagement, strategy formulation, preparation for strategy integration, strategy execution and evaluation.
- 1 year of work experience in strategic planning and 1 year in a similar field, e.g. analysis, finance, marketing, human resources policy, project management, plus eligible education (covering at least two areas of these four strategic planning domains – formulation, implementation, execution, environment).

Plus, the SPP exam application requires evidence of the following knowledge and experiences:

- Understanding of strategy practice by working on efforts related to strategy work
- Applying best practices related to strategy in at least one effort.
- Understanding of strategy work by participating in efforts related to strategy.
- Leading activities related to strategy work with some oversight.
- Familiar with management theories and practice.
- Familiar with some strategic planning schools and capable in a few.
- Can explain the difference between good management and good strategy.
- Understanding of oversight and management of business evaluations.
- Evaluating process for strategy work.
- Evaluating current performance measures and metrics for efficacy.
- Understanding of different types of performance measures and can create objective and actionable measures.
- Identifying gaps and consulting with experts in strategy as needed.
- Making reasonable recommendations based on performance measurement results.
- Preparing for, supporting, and following up on a strategic retreat for small, medium and many large organizations; beyond facilitation.
- Has demonstrated business acumen, including:

- Good intuition
- Strong facilitation skills Listening skills
- Capable of learning industry fundamentals quickly
- Organized and Motivated



4.2 Strategic Management Professional (SMP)

To qualify to take the SMP exam, candidates must demonstrate they have experienced one of the following eligibility paths:

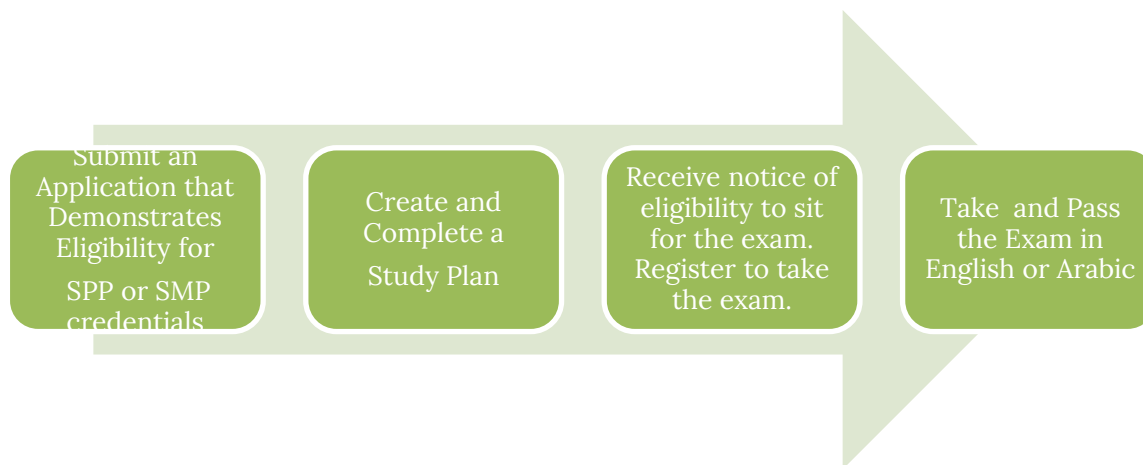
- A minimum of 10 years' work experience in any or all the domains of the certification competencies or Body of Knowledge (BOK 3.0) and a high degree of competency in five of the Business Acumen competency areas.
- A minimum of 7 years' work experience in the domains of the certification competencies or BOK 3.0 plus active designation as a Strategic Planning Professional (SPP), completion of a strategic planning certificate, or a Bachelor's degree with focus on strategic planning and a high degree of competency in five of the Business Acumen competency areas.
- A minimum of 5 years' work experience in the domains of the certification competencies or BOK 3.0 plus graduation from a degree program in Business, Public or Nonprofit Administration; Strategic Planning; or Strategic Management covering subjects such as planning, analysis, market research, policy, organizational design, change processes, interviewing, risk analysis, project management, budgeting, performance reporting, decision making and a high degree of competency in five of the Business Acumen competency areas.
- Within the past ten years, has been a professor of strategic planning studies at an accredited college or university plus 5 years' work experience in the domains of the certification competencies or BOK 3.0 and a high degree of competency in five of the Business Acumen competency areas.

Plus, the SMP exam application requires evidence of the following knowledge and experiences:

- Has led multiple efforts in strategy work without oversight.
- Has a breadth of experience across business and/or government and/or not for profit organization(s).
- Knows best practices and has demonstrated thought leadership related to strategy work. Has demonstrated experience of oversight and management of business evaluations.
- Has demonstrated the ability to offer insight into strategic alternatives, evaluate organizational culture, and evaluate likely success of a strategy, ability to see the projects required for change and success.
- Familiar with management theories and practice.

- Familiar with most strategic planning schools and very capable in some.
- Strong knowledge and understanding of the difference between good management and good strategy.
- Has demonstrated ability to define the methods to complete activities in strategy work and lead a process toward successful execution.
- Has experience in identifying, planning and implementing projects to drive achievement of a strategic plan.
- Routinely assesses changes or impacts related to strategy and adjust approaches and methods to assure a successful result in alignment with strategy.
- Can evaluate current performance measures and metrics for efficacy.
- Understands different types of performance measures and can create objective and actionable measures.
- Can create an evaluation process for strategy work.
- Can make reasonable recommendations based on performance measurement results.
- Capable of leading a strategic retreat for small, medium and many large organizations; beyond facilitation.
- Has demonstrated business acumen, including:
 - Good intuition
 - Strong facilitation skills
 - Listening skills
 - Capable of learning industry fundamentals quickly
 - Organized
 - Motivated

5.0 OVERVIEW OF THE CERTIFICATION PROCESS



When you decide to pursue certification through IASP, the process is far more than passing the exam. You must first qualify to take the exam by demonstrating your eligibility on the application. The application is as important as the exam itself.

Our Application Reviewers are evaluating whether you have the background to be

successful on our exams. If they feel that you do not have the experience to be successful in the level you have chosen, they will advise you to take the appropriate level of exam.

The second critical step on the certification journey is your study plan. It is important to familiarize yourself with all of the theorists identified in the most current version of the Body of Knowledge (*which can be purchased and downloaded from the IASP Website here: www.strategyassociation.site-ym.com/store/ViewProduct.aspx?id=4660938*). When applicants do not pass the exam, it is often obvious that they were not familiar with key theorists in the fields of management and strategy.

The third step is to schedule your exam with our exam provider and pay the exam fee. You must take the exam within 13 months of payment.

The fourth step is taking and passing the actual certification exam that contains 160 multiple-choice questions over a three (3) hour timeframe. The primary exam is in English and contains college-level English and strategy jargon. While our reach is worldwide and our family of credentials is available globally, we recognize that for success on our exams, you must have language fluency in reading college-level English and interpreting multiple choice questions from an environment where English is the language of business.

Please note: If English is NOT the language of business in your country, be aware that successful performance on our exams requires superior business English proficiency.

We are currently piloting an Arabic version of the exam with 160 multiple-choice questions over a three (3) hour timeframe, however, all study materials remain in English.

5.1 WHAT IS THE STEP-BY-STEP PROCESS FOR CERTIFICATION SUCCESS?

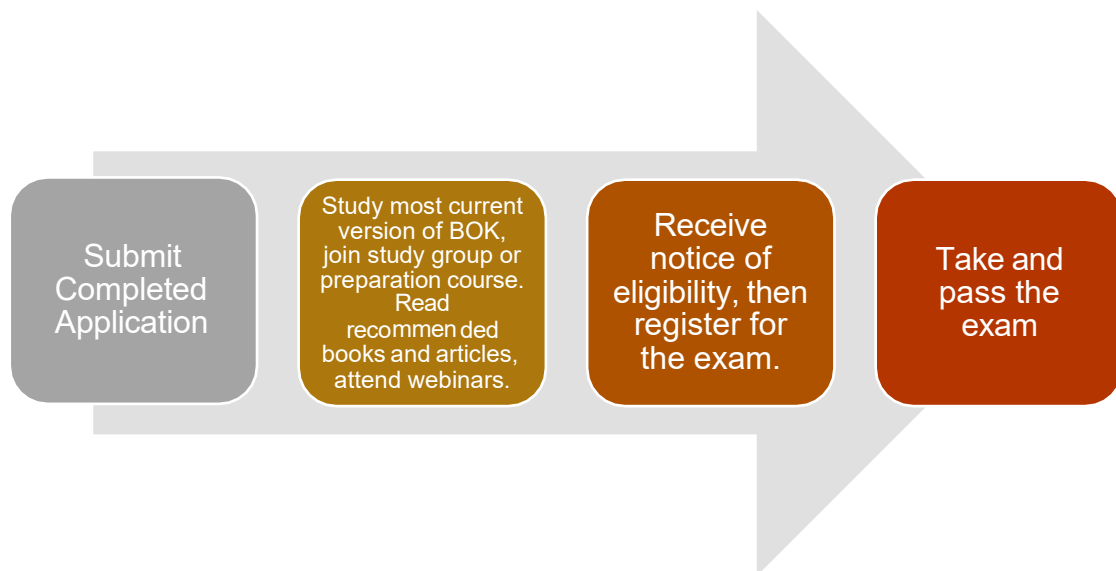
1. Decide which credential is right for you and assess whether you meet the eligibility requirements for your chosen credential by downloading and reviewing the current application from www.strategyassociation.org. (The application is also contained in Appendix C)
2. If you do not meet the eligibility requirements, develop a plan of activity that will get you to eligibility. *You may need to teach your chapter colleagues, publish*

an article, attend a strategy conference, or register for a course of study

3. Before completing your application, consider how, what and when you will study for this exam. Download and review the most current version of the BOK. Decide how you will prepare for the exam. Consider registering for an online or face to face course with an IASP [Certification Preparation Provider \(CPP\)](#), or if you will form an informal study group with other colleagues in your company or your chapter. Keep reading for further study plan suggestions.
4. If you believe you have met all the eligibility requirements for your chosen credential, complete and submit your application for review before the deadline of your desired testing date. [Deadlines are posted on the IASP website.](#)
5. After completion of the Application Form, the IASP Certification Coordinator reviews the application. Incomplete applications are returned to the applicant for correction and re-submission. If the applicant does not resubmit a complete application within 30 days, it is removed and a new submission must be started. The application is not considered to have been received until after it has been submitted and accepted by the Certification Coordinator. You will receive an email confirming receipt of the complete application.
6. If all required documents (including all references) are submitted, your application will be reviewed. If you need more work experience or education, the reviewers may recommend an alternative path for you.
7. While you are waiting for your application to be approved, begin your study plan implementation in earnest.
8. When you get notice of eligibility to take the exam, register for a specific date during your preferred two-week examination cycle through our exam vendor, Prolydian. IASP offers four examination periods – in February, May, September and December. All exams are offered via online, remote live proctoring so you can take your exam from the comfort of your home or office. Exams are proctored by Prolydian partners Examity or Meazure/ProctorU Services.
9. You can find information on Prolydian, our live, online proctoring partner, via their [FAQ](#). Be certain that your web browser is updated and meets the requirements of Prolydian.
10. Sign in on the scheduled date and time. Using the camera on your laptop, you

will need to demonstrate to the remote proctor that your testing environment is free of books and papers. Once verified, you may take the 160-question multiple choice exam. Exam results are released shortly after the end of the testing period.

11. Pass the exam, receive and post your digital badge of achievement, send a press release to your local media, and enjoy the moment!
12. Develop and implement a plan for continued formal and informal education to maintain your certification. Recertification is required every three years for both the SPP and SMP credentials.



6.0 WHO DO I CONTACT IF I HAVE QUESTIONS?

- Visit www.strategyassociation.org and select Certification from the menu. The answer to your question may already be posted in the Frequently Asked Questions (FAQ) tab.
- Email your questions to certification@strategyassociation.org, or
- Call the Certification Office at (613) 570-8339 or the Main IASP Office at +1.844.345.2828

Our certification administrators are based in Ottawa, Ontario, Canada. Office hours are from 9:00-5:00 in the Eastern Time Zone.

7.0 ASSESS YOUR READINESS TO CERTIFY

Step 1: Scan and plan for minimum experience eligibility.

IASP certification requires experience and preparation.

- Review the eligibility paths for each certification level in this

document and the IASP website

- **Please note:** Management experience does not equal strategy experience. For example, it is management work to implement a customer profitability management system. It is strategy work to determine what kinds of customers do we want to target to optimize results. Does your **strategy experience** meet the stated minimum levels?

If you don't meet the minimum requirements, you might want to create a plan to systematically expose yourself to resources, including books, people, chapter events, and webinars that will ground you in the strategy field.

Step 2: Prepare a Certification Study Plan. Use a project management approach.

- **Conduct an environmental scan, then plan your specific approach.**
 - ✓ Note the deadlines for the application submissions and exam test dates. **Decide on your target exam cycle.**
 - ✓ **Check out the available material on the IASP website.** Be sure to download the the most current version of the Body of Knowledge or the specific section related to your desired level of Certification.
 - **Take note of the Glossary, Further Reading and References identified in the BOK 3.0.** The key resources identified in the Body of Knowledge are a starting point for your study plan.
 - **Use the competency outline,** in Appendix A of this Handbook as a self-assessment. Identify your gaps in knowledge and craft your study plan around filling those gaps of knowledge.
- **Step 3: Build a specific study plan.** Study for this exam just as you would for any academic degree. It should include the following:
 - ✓ **Consider what is the best study method for you.**
 - Are you an entrepreneurial learner where you have the discipline to create your own plan and work that plan...going it alone as long as you know what to study? If so, you may be a good candidate for self-study or self-accelerated online learning.
 - Are you a collaborative learner where you really appreciate talking about concepts and hearing how others interpret and illustrate the ideas? If so, you may be a good candidate for classroom learning and/or an informal study group in your chapter, your company or virtually.
 - Are you a systematic learner where you like things in bite sized chunks and a consistent study routine? If so, you may be a good candidate for facilitated online learning or a local study group.
 - ✓ **Identify which resources/theorists you need to become familiar with.** You may choose to read authoritative books by key theorists or access a summary of key concepts of the author. You might consider using the IASP flashcards

that summarize relevant theories and concepts, available through the IASP store. We also recommend using IASP's Body of Knowledge (BOK 3.0) as a key resource.

- ✓ **Identify a specific time of the week that you will study.** Will it be during your lunch hours? Will you come to work early three days a week to get an hour of study in before the workday? Will this be a weekend commitment? Identify a specific block(s) of time and record it in your calendar so you don't give that time away.
- ✓ **Think about how you will keep notes.** For many learners, handwriting or mind-mapping your notations makes information stick. For some, it is reading, then translating the concepts into your own words on some computer application. Some people like to go out and buy a really cool spiral notebook for note-taking...make it fun for you and make the ideas stick as you study.
- ✓ **Consider where you will study.** Some people find that a library atmosphere allows for better concentration. Others prefer a quiet atmosphere and sitting at a table. Some prefer an easy chair... be intentional about where you study. Consider the atmosphere and where you will be able to focus and process a lot of complex content.
- ✓ **Consider if you need a mentor.** You may be able to find a mentor in your local IASP chapter, in your company, or you might contact a certified professional near your local area. See the current list of SPPs and SMPs at <http://www.strategyassociation.org/page/CertProfessionals>
- ✓ Be sure to **plan for enough time to complete your application.** It will take you some significant time to complete the application. It requires qualitative responses to demonstrate you meet the eligibility requirements to sit for the exam.

8.0 WHO CAN HELP ME PREPARE FOR THE EXAM?

8.1 How to Find an Approved Preparation Course

IASP approves **Certification Preparation Providers (CPPs)** who offer coursework in alignment with the IASP standards. Virtual and face-to-face courses are available. [See the IASP website](#) for the current list of approved providers, their products, and their contact information. It should be noted that the approved CPP list is dynamic; new CPPs may be added at any time once they have met IASP requirements.

8.2 How to Form a Study Group

You have a few options to form an informal study group to prepare for the IASP certification exams.

1. Let your local chapter leaders know you are looking for peers to form a study group. They will help you locate others in the chapter who are in the same pursuit.
2. Convince your peers to go on this journey with you. Make a commitment inside your company to do this together. Sharing the journey will make you a tighter team and a stronger department.
3. Let your HR department know you are pursuing strategy certification. Department personnel may be able to support you in finding colleagues to mentor or study with.
4. Post on LinkedIn that you are looking to form an online study group. Virtual study groups can be just as effective as in person. Feel free to join IASP's [LinkedIn Group](#) and look for a study group there.

8.3 How to Form a Chapter Study Group

1. Find a local Chapter. IASP Chapters are listed on the website under the “Chapters & Communities” tab.
2. Post an announcement in the appropriate Chapter Group through the IASP website, using the Chapter’s “forum”.
3. Establish a study group lead or co-leads who will organize the meetings, create a list of attendees, ensure that they are serious, and divide the review material into topics to be divided among the participants.
4. Poll the participants to determine whether they prefer to meet virtually or face-to-face. Establish a consistent location and time, if possible, to facilitate group members being on-time.
5. If meeting virtually, it will be very helpful to use a virtual meeting package such as Zoom, Microsoft Teams or Google Hangout. If meeting face-to-face, it may be helpful to find a location with a projector and whiteboard, wall or screen. Suggestions include member offices, local library or local establishment meeting rooms. Prepared presentations will either need to be printed or viewed on participants’ iPads or computers.
6. Choose review materials carefully. Some certification preparation providers have developed study guides with practice exam questions. A list of these materials are available from IASP.
7. Assign topics to each member or, if the group is large, to two or more participants to prepare a presentation for the group. If a presenter ends up with a conflict, it is his or her responsibility to inform the group lead and to work with them to change the schedule or swap topics with another member.

8. Meet for a sufficient amount of time to allow the presenter to present the topic and then to work through relevant test questions. Part of the learning will be to work with each other not only on content but also on test taking strategies.
9. Depending upon the date and time of the meeting, you may wish to coordinate refreshments, or agree for everyone to bring his or her own.
10. Make it fun. Discuss practical applications of the topics covered, and, if possible, bring in members who have passed the exam for advice.

9.0 TIPS FOR APPLICATION COMPLETION, STUDY AND EXAM TIPS

9.1 Application Completion Tip

The Qualifying Application requires thoughtful completion. If you are a manager, do not assume that you are doing strategy work. On your application, it is important to connect the dots between your education and experience to the field of strategy. Reviewers will be assessing whether your work experience and the content you provide on the application meet the established standards to be eligible to take the exam.

The information you provide will help reviewers assess how well you use your knowledge of strategy. For example, could you, as an SMP, lead the strategic planning offsite workshop for a medium-sized organization? Please be sure to connect the dots between your background and the field of strategy. Be explicit when you list your education, professional experience, business acumen and in your case study. Where possible, we recommend you identify how your experience relates to which specific exam domains and competencies.

9.2 Study Tips

1. Create a structured plan for your study and work your plan.
2. Identify someone who will hold you accountable for completing sections of your study plan. It might be a mentor, a co-worker, or one of your children. Studying in front of your children establishes you as a role model as your children do their school work.
3. Use the competencies in Appendix A as a self-assessment AND as a final review tool.
4. You may find it helpful to review key concepts and terms using a set of flashcards. You can make your own with the term on one side and the definition on the backside OR you can purchase electronic flashcards on the IASP Website.
5. It is human nature that when you read independently, we tend to notice all

the information that proves we are right rather than noticing new information. If you choose to self-study, you want to be very intentional to notice *what's different* in the readings than what you may already “know”.

9.3 Exam Tips

1. Good exam questions always have a plausible distractor which is an answer option that seems like a possible answer. An individual who is prepared can detect the distractor and rule it out as the correct answer option. Be ready for answers that sound plausible, but are really trying to distract you from the correct answer option. For example, you might have an answer drawn from an analytical thinking process and one drawn from a systems thinking process. We recommend that when it comes to strategic planning, your best option would be in the systems perspective. If the question is more about project management, then the analytical perspective is likely best.
2. You will have 180 minutes to complete 160 questions. Work at your pacing as you prepare for the exam. Try to complete at least one question per minute. The exam is not a race and there is no extra credit for completing it in less than 2 ½ hours. When you read too fast, it is very easy to misread the question. So find the pace that is right for you.
3. Fatigue will likely set in as you sit and read for three hours. Let's face it, few of us sit for three hours just reading on a computer screen! While you have to follow Prolydian rules, you may take a break to revive yourself. A break might include leaving the room to go to the bathroom OR it might be just sitting back in your chair, closing your eyes and doing some deep breathing. Do what you need to do to stay alert and productive during this test. Just be sure to factor that break into your timing so you don't run out of time to complete the exam. If you decide to leave the room, you will need to reestablish the security of the site with the proctor.
4. Our exam partner, Prolydian, has published rules for the exam. You will receive the complete list of rules when your test site is confirmed. Be sure to read that communication carefully.

10.0 MUCH THIS WILL COST?

Fee Structure (payable only in USD)	For IASP Members	For Non-Members
Qualifying Application Fee (Non- Refundable): For SPP and SMP credentials <i>Fees must be paid prior to commencement of application review activity</i>	\$200.00 USD	\$250.00 USD
Candidate Exam Fee: For SPP and SMP credentials To be paid ONLY after Qualifying Application is approved <i>Fees must be paid in order to receive exam admission confirmation</i>	\$725.00 USD	\$925.00 USD
Retake Exam Fee:	\$300.00 USD	\$350.00 USD
Candidate Exam Fee Group Discount: <i>May only be applied when a minimum of four candidates register in one batch*</i>	Volume discount for exam applications submitted for the same exam cycle and paid from a single billing, For 4-7 \$ 75 off each exam fee. For 8-14 \$100 off each exam fee For 15+, \$125 off each exam fee *To qualify for the group discount, an official representative of the group must contact the IASP Certification Director at certificationdirector@strategyassociation.org or call +1 (613) 570-8339	

PLEASE NOTE: All certification fees are non-refundable.

11.0 FOUR EXAM CYCLES

IASP Certification Exams are offered four times a year, in February, May, September and December. All tests are administered via Prolydian’s online, live proctoring.

Please visit the IASP website, www.strategyassociation.org/certification, for specific dates.

Once your application is approved, you have 13 months from date of approval to take and pass your exam. We encourage all applicants to review the [Prolydian Q&A section](#) to become comfortable with live, online proctoring.

12.0 Special Circumstances

12.1 Special Needs Candidates

Prolydian serves candidates with special needs. They will supply their exam partners with special instructions, based on the candidate's special needs. To assure accommodations are in place, please allow at least two weeks lead time before the desired exam date.

12.2 Rescheduling Your Assigned Examination Appointment

Once your application is approved, you have 13 months from the date of the application to take the exam. If you have booked an exam date, but need to reschedule to the next testing period (within the 13 months from date of application approval period) you can do so by paying a transfer fee of \$150. This fee is based on cost and is not punitive. There are no refunds of application or exam fees.

13.0 UNSUCCESSFUL CANDIDATES

If you were unsuccessful on the exam, you will receive an email outlining your overall raw score and the score by domain. We recommend you create a new study plan based on your results. You may retake the exam, as outlined below.

11.1 Retaking your Exam

If you are unable to pass your exam on the first try, you can retake it during the available IASP exam periods, as long as you are within your 13 months from date of application approval period. The fees to retake the exam, are as follows

IASP members – USD 300.00

IASP non members– USD 350.00

It should be noted that on average the pass ratio for all students taking the exam during a test cycle is between 65-75%. If everyone passed, that would be an indicator that the test is too easy and that it does not differentiate knowledge and competencies appropriately.

14.0 RECOGNITION OF ACHIEVEMENT

When you successfully pass the exam, you will receive an email from the Certification Department with the good news. You will also receive a digital version and a hard copy of Proof of Certification. Additionally, your name will appear on the IASP website as a certified individual and you will be acknowledged during the IASP Annual Conference, generally held in May/June each year.

14.1 USE OF THE CERTIFICATION TITLE

1. Only individuals who are currently certified may use the titles of Strategic Planning Professional (SPP) or Strategic Management Professional (SMP).
2. The title and certification is an individual recognition and may not be used to imply that a firm is certified.
3. Use of the title and credential by individuals who have not been awarded the recognition or who have failed to maintain the credential through the renewal process is strictly prohibited.
4. Individuals inappropriately displaying the IASP certification credentials will be subject to possible legal action.
5. The titles of Strategic Planning Professional (SPP) or Strategic Management Professional (SMP) are trademarked property. Its use is subject to approval by the IASP Certification Commission.

15.1 REVOCATION OF CERTIFICATION

15.1 Ethical Behavior

IASP expects recipients of its certifications to behave in ways consistent with commonly held characteristics of ethical behavior. Documented breaches of ethical behavior are the bases for revocation of certification.

The following is a summary of behaviors which may lead to disciplinary review.

1. Conviction in a court of law of a felony which may affect public health or safety
 2. Fraud or deception in attempting to obtain a certification
 3. Misrepresentation of certification status
 4. Irregularity in connection with any Board examination
 5. Failure to pay recertification fees or provide information required by the IASP Certification Commission
 6. Misuse of IASP credentials, examinations, and other intellectual property
 7. Demonstrated incompetence upon a series of complaints
1. Additionally, in their eligibility application, SMP candidates certify that they will uphold the following ethical standards:

15.2 Strategic Management Professional (SMP) Code of Ethics

When you earn the Strategic Management Professional (SMP) designation, the designation communicates that you have demonstrated the knowledge and experience required by IASP to effectively support and contribute to strategic planning projects and services. As a strategy professional, you must exhibit a certain executive presence, integrity and trustworthiness to earn respect and cooperation from your employer and those you work with directly. As a result, the following articulates the expected behaviors of an SMP.

1. Trust and trustworthiness.
 - Perform activities and actions that build trust and credibility in managing, facilitating or executing strategy-related duties, responsibilities, processes and/or projects as well as in the profession.
 - Assure the integrity of process in the delivery of strategy services.
2. Professionalism.
 - Facilitate the use of processes, methods and tools to add value and help employers or clients achieve their goals.
 - Be the steward of process with impartiality toward content.
 - Assure data-driven recommendations for strategy development and execution.
 - Use group processes and methods that add value to the employer or client.
 - Create safe environments, to the maximum extent possible, for planning team participants to express their opinions and concerns.
 - Create inclusive environments, to the maximum extent possible, for group participation to ensure optimal “buy in” and “stay in”.
3. Respect.
 - Inform yourself of cultural norms, customs, terminology, hierarchies, rights and group autonomy so as not to disrespect individuals or groups.
 - Listen with respect.
 - Address disagreement directly with tactful and diplomatic communication.
4. Ethical Responsibility.
 - Always act in the best interests of the employer or client.
 - Protect proprietary and confidential information received in the course of fulfilling or completing a duty/responsibility, process or project.
 - Practice accountability to fully and completely deliver on the promises made to the employer or client.
 - Take ownership of errors, omissions and resulting consequences, assuring timely and honest communication to the appropriate parties.

2. Disciplinary Action/Revocation of Certification

Violation of the IASP policies or a breach of ethics may lead to disciplinary action, including (but not limited to) the actions listed below:

1. Denial or suspension of eligibility
2. Revocation of certification
3. Non-renewal of certification
4. Reprimand
5. Suspension of certification

Disciplinary action, including revocation of certification, must follow due process where notice is served to a certificant and a disciplinary hearing is held. The certificant is entitled to be heard by a panel of three certified peers and an appeals process is available.

3. Disciplinary Review Process

When violations occur, the Program Director shall bring the information about potential disciplinary action to the Certification Commission who will appoint a three member panel drawn from the Application Review Team to review the situation. To preserve integrity of due process, no member of the Certification Commission will be assigned to such a panel. Decisions may be appealed to the Certification Commission with 30 days.

16.0 REQUIREMENTS FOR CERTIFICATION RENEWAL

The International Association for Strategy Professionals Certification Commission requires that you re-certify every three years for SPP and SMP to ensure that you maintain a relevant knowledge base over time and engage in the profession. Re-examination is NOT required, however, it is expected that strategy professionals will have completed a broad range of activities to remain current in strategic planning and management.

A separate *Recertification Handbook* is available with instructions for filing your renewal application.

We do recommend that you create a file titled *IASP Recertification*. This file should be used to keep track of any activity that you participate in that may qualify you for recertification points.

Activities that qualify are:

- Participating in strategy-related courses offered by colleges or universities, Approved Learning Providers (ALPs), or employer-sponsored courses.

- Attending IASP events at any level: international, chapter, community of practice, in person or virtually.
- Attending other organization events that encompass strategy topics
- Learning independently, reading books/articles or listening to lectures on strategy- related topics
- Serving as a volunteer to IASP
- Serving on Boards where you can apply your strategic planning skills
- Working as a strategic planner or in a senior organizational role with strategic planning content as part of the position
- Authoring a book, chapters in a book, or article on strategy or strategic planning
- Teaching courses or speaking at organized events focused on strategy or strategic planning.
- Developing new work or theories of strategy

ASP Candidate Handbook

Appendices

Appendix A: Links to Exam Competencies Outline

Appendix B: Links to Qualifying Applications

Appendix A:

Please visit the links below for the most up to date Content Outlines

- Review the [SPP Competencies](#) needed for a competent performance.
- Review the [SMP Competencies](#) needed for a competent performance

Appendix B: Qualifying Application

Please visit the links below for the most up to date samples of the applications.

Review the [SMP Sample PDF application](#)

Review the [SPP Sample PDF application](#)

Please note, the above samples are PDF examples of the online applications. The applications are submitted online via our application partner - Prolydian. We strongly recommend that you use the sample applications provided to prepare a Word document with all the content you will submit via our application platform. This will allow for a smoother experience.

