



# SPP

## Exam Content Outline

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Domain 1 - Engagement (19%)



Domain 2 - Strategy Formulation (27%)



Domain 3 - Preparation for Strategy Transformation (25%)



Domain 4 - Strategy Execution, Governance and Evaluation (29%)

The Strategy Planning Professional (SPP) exam is created using the SPP EXAM CONTENT OUTLINE, which details the responsibilities needed by today's strategy practitioners. In turn, the OUTLINE is created by strategy subject matter experts (SMEs) whose work is reflected in a rigorous job task analysis (JTA) undertaken by the International Association for Strategy Professionals (IASP), formerly the Association for Strategic Planning (ASP), in 2019. This JTA is updated on a regular basis to ensure it is consistent with current practices in the strategy profession. The current exam content outline came into effect in May 2021.

## Domain 1 - Engagement (19%)

**E**NGAGEMENT: This domain normally accounts for 15 to 19 percent of the SPP exam, or 24 to 30 questions, out of 160. The purpose of the group of activities that make up the ENGAGEMENT domain is to build employee commitment and remove barriers to all strategy activities. Leaders are called upon to: explain the strategy; report on initiatives that will be carried out; identify current priorities; highlight progress made; describe cascading objectives; and, reward people for their achievements. It also requires leaders to take account of feedback offered up by employees throughout the organization.

# Activities

## 1A Culture of Strategy Management and Agility

- 1A1 - Drive tactical and project planning within a business unit, in alignment with the 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 options.
- 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 to staff the value of change to minimize resistance.

## Domain 2 - Strategy Formulation (27%)

**STRATEGY FORMULATION:** This domain normally accounts for 24 to 28 percent of the SPP exam, or 38 to 44 questions. The purpose of this group of activities is to devise a new strategy, or make adjustments to an existing one. This entails: analyzing the external and internal environments; formulating and analyzing several strategy alternatives; and, selecting the most appropriate.

# Activities

## 2A External and Internal Environmental Scan

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.

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 Transformation (25%)

**P**REPARATION FOR STRATEGY TRANSFORMATION: This domain normally accounts for 27 to 31 percent of the SPP exam, or 43 to 50 questions. The purpose of this group of activities is to align the operating model (i.e., how the organization functions) to the new strategy. This entails identifying, determining the scope of and executing the required transformation projects.

# Activities

## 3A Alignment of the Organization Design with Strategy

- 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.
- 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.
- 3C8 - Identify desired outcomes for each activity.

## Domain 4 - Strategy Execution, Governance and Evaluation (29%)

**STRATEGY EXECUTION, GOVERNANCE, AND EVALUATION:** This domain normally accounts for 26 to 30 percent of the SPP exam, or 41 to 48 questions. The purpose of this group of activities is to deliver on a day-to-day basis the stakeholder value propositions defined by the strategy. This entails executing all primary (e.g., R&D, manufacturing, logistics, sales, and marketing) and secondary (e.g., procurement, IT, HR and finance) processes at the heart of the operating model in perfect alignment to the strategy. Also, the purpose of this group of activities is to direct and control all strategy activities. This entails setting the organization's direction (i.e., challenge and ratify the direction setting recommendations coming from the other group of activities) as well as make decisions on the conduct of and resource allocations tied to the other groups of activities.

# Activities

## 4A Strategy Execution and Transformation

- 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.
- 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.



The International Association for Strategy Professionals' (IASP) mission is: To Lead and support people and organizations first through the promotion of a holistic approach to strategy management and, secondly, by setting professional standards for strategy through certification, thought leadership and professional development. Just as IASP has earned its standing as the premier strategy certification organization, individual IASP-certified professionals have earned their credentials for possessing the skills and knowledge needed to properly manage risks and enhance people-driven business results. The IASP offers certification as a “Strategy Planning Professional Level I” (SPP) and a “Strategy Management Professional Level II” (SMP). Learn more about IASP certification programs at [www.strategyassociation.org](http://www.strategyassociation.org). The IASP wishes to acknowledge the contributions of the following individuals whose efforts as part of the Job Task Analysis (JTA) made possible this important manual:

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