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Job Task Analysis (JTA)
Strategy Planning Professional (SPP)

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Glossary

Certificate – A certificate as distinct from a certification, is earned on completion of a course or training period signifying the individual earning the certificate has demonstrated the requisite skills. A certification, on the other hand, confirms a similar accomplishment but the individual earning the certification does so by also acknowledging the need to remain abreast of developments in the appropriate field and applying for recertification on a regular basis, something not expected nor required upon earning a certificate.

DACUM – Developing a Curriculum Process.

IASP – International Association for Strategy Professionals.

ISO – International Standards Organization.

JTA – Job Task Analysis.

SME – Subject Matter Experts.

SMP – Strategy Management Professional.

SPP – Strategy Planning Professional. Alternatively or formerly Strategic Planning Professional. In 2022, the IASP emphasized the noun “strategy” in naming its credentials, thereby abandoning emphasizing the adjective “strategic,” deemed less appropriate as matters of strategy research and action have evolved.

Acknowledgement and Synopsis of the 2025 Job Task Analysis (JTA) Activities

On behalf of the International Association for Strategy Professionals, we acknowledge the commitment and dedication of the following personnel whose skills and knowledge made this second iteration of the IASP Job Task Analyses process possible and invaluable: Jeff Greenwald CAE, Chairperson, Tom Carter CPA, SMP (Emeritus), Jesse Lambert SPP, Shannon Heuberger PhD, SPP, Teresa Fraker CAE, Linda Snell SPP, and Dr. Dean Black, DBA, ICE-CCP, SMP, CAE, CNP, CVA. Over approximately fourteen months, their collective collaboration and cooperation added tremendously to the IASP's understanding of the ins and outs of strategy planning and strategy management in public, private and the 3rd (volunteer non-profit) Sector entities. We are tremendously grateful to all of them.

Synopsis - IASP Certification Commission Updates Strategy Planning Professional (SPP) and Strategy Management Professional (SMP) Examination Content Outlines

By Marilyn Bulloch, DPharm, SPP

Since 2010, over 630 individuals in more than 55 countries have successfully applied for and obtained either the Strategy Planning Professional (SPP) or Strategy Management Professional (SMP) certification offered by the International Association for Strategy Professionals (IASP). The IASP Certification Commission recently announced updates to the SPP and SMP certification examination blueprints. The updates were made following the completion of an independent job task analysis (JTA) for both examinations in 2025 as part of the Commission's efforts to pursue formal accreditation for both credentials. The last JTA occurred in 2019. A team of seven subject matter experts (SMEs) was appointed to review and modify each examination's domains, task statements, and corresponding weights through a DACUM facilitated process (Table 1). The core structure for both examinations remains relatively unchanged, with four domains and 10 subdomains that are the same for both the SPP and SMP. However, task statements and knowledge areas across these domains are specific to strategy planning or strategy management, respectively. Electronic validation surveys were distributed to members of the profession to assess the importance and frequency of performance for each task statement or knowledge area. Results of these surveys were used to determine the content validity for both examinations and to calculate appropriate weighting. The majority of survey respondents were from North America, but all continents were represented except for Oceania which was absent from the SMP survey participants. There were no significant differences in terms of the age, educational level, or professional years of experience for respondents to each of the two JTA surveys and demographic characteristics of participants appear to remain representative of the strategy profession overall.

The SMEs reviewed 64 task statements and knowledge areas for the SMP and 62 task statements and knowledge areas for the SPP examinations. The team made minor wording or phrasing revisions to 41 SMP task statements and 37 SPP task statements. All tasks were rated as “somewhat important” or higher by survey respondents. The number of tasks rated “important” or higher was not significantly different between the 2019 and 2025 JTAs for SMP (54 vs. 60; $p=0.16$) but there were significantly more in 2025 on the SPP survey (46 vs. 58; $p=0.0012$). There was a high degree of professional consistency within the SMP survey with 92% of task statements experiencing negligible or small magnitudes of change in importance and no fundamental or critical changes in the six years between the two JTAs. Slightly lower, but not statistically significant, professional consistency was observed with the SPP survey with 89% of task statements demonstrating negligible to small changes. The SPP role did see a re-prioritization of its professional structure with 58% of task statements in 2025 ranked ≥ 10 positions beyond their 2019 rank. However, there was a strong positive relationship between importance rating and importance ranking (Pearson $r=0.88$; $r^2=0.77$; Spearman $\rho=0.93$ $p<0.0001$) and the rank-order shifts accurately reflect changes in task importance reported by survey respondents.

Frequency of task performance remained high for all SMP and SPP task statements with 60 SMP tasks (94%) and 50 SPP tasks (81%) performed by $\geq 85\%$ of respondents in 2025, which was similar to 2019 ($p=0.34$ and $p=0.4$ respectively). The 2025 JTA survey assessed performance frequency for each task using a 4-point Likert scale. Mean frequency ratings ranged from 2.31-3.62 for SMP tasks and 2.32-3.56 for SPP tasks. The standard error of the mean for all tasks in both surveys was less than 0.2 supporting that knowledge and task content were well covered for both examinations.

Although there were more key changes in task importance with the SPP JTA, after integrating frequency of task performance into the weight calculations, the distributed weight of the exam remains unchanged from 2019. On the other hand, consideration of frequency of task performance resulted in slight modifications to weights across all four SMP examination domains. The largest increased shift occurred in Domain 2: Strategy Formulation with a 5% increase in weight due to a corresponding weight increase in the Strategy Design and Formulation subdomain. Domain 4: Strategy Execution and Evaluation saw a 5% decrease in weight, driven by decreases in weight for all three of its subdomains. The weight for Domain 1: Engagement was increased by 2% while Domain 3: Preparation for Strategy Integration was decreased by 2%. It is important to note that the SMP role did not have any fundamental changes in professional priorities and that the changes in examination content weight reflect a reallocation of time dedicated to specific tasks.

Overall, the 2025 JTA showed a re-prioritization of the SPP task hierarchy and a shift in time dedicated to SMP tasks. The blueprints for each examination were updated to reflect these findings. The IASP Certification Commission will also use the findings to guide test item writing, continuing education, and professional development supporting the SMP and SPP certifications. While the changes in content weights for the SMP examination was small and negligible for the SPP examination, the findings of the 2025 JTA compared to 2019 highlight important professional evolutions. To ensure that the SMP and SPP examinations continue to

accurately reflect the strategy profession, the Certification Commission plans to conduct future JTAs and update examination content outlines approximately every five years.

Table 1: Content Outline and Weights for the Strategy Planning Professional and Strategy Management Professional Examinations

Domain	<i>Weight (%)</i>			
	SMP		SPP	
	2019	2025	2019	2025
Engagement	19	21	20	20
Culture of Strategic Management and Agility	13	11	13	13
Planning Team Expectations	6	10	7	7
Strategy Formulation	24	29	24	24
Internal and External Environmental Scan	14	14	14	14
Strategy Design and Formulation	10	15	10	10
Preparation for Strategy Integration	29	27	29	29
Alignment of the Organization Design with Strategy	10	10	9	9
Alignment of Operations with Strategy	6	6	7	7
Operational Planning for Implementation	13	11	13	13
Strategy Execution and Evaluation	28	23	27	27
Strategy Execution and Transformation	14	11	15	15
Governance and Decision Making	4	6	3	3
Strategic Performance Management	10	6	10	10

JOB TASK ANALYSIS Strategy Planning Professional

EXECUTIVE SUMMARY

From October 2024 to April 2025, The Job Task Analysis (JTA) Team met six times to perform an analysis the purpose of which was to develop a content outline for the Strategy Planning Professional (SPP) credential. During these meetings and using accepted practices, the JTA Team identified the job duties and tasks applicable to individuals in the SPP role.

Following these meetings an online survey was created to validate the results of the duties and task study and finalize the content outline. The online survey was administered to strategy planning professionals. Survey participants were asked to rate each task area using two rating scales – frequency by which they were called upon to perform the task and their subjective perception of the importance of the task.

Survey respondents included professionals working across the United States and other regions of the world and were of varying ages and educational backgrounds and various work experiences related to strategy planning and management activities. The resulting demographics and job analysis are presented herein. Data and analysis found no major job duty nor task gaps from those which were identified by the JTA Team. Consequently, the profession validated the content outline that promulgates job duties and tasks applicable to strategy planners.

The Team presented the job task analysis and the validated content outline to the Certification Commission. Both were approved on 23 October 2025 with the following motion obtaining unanimous consent:

Recommend the approval of the SPP Content Outline as developed and presented by the appointed Job Task Analysis Team, based on the industry validation report and ISO 17024, Conformity assessment (Greenwald/Brewer)

PURPOSE AND BACKGROUND

This study and the resulting report describe the procedures used to conduct a JTA of the duties and tasks of strategy planning professionals. The JTA utilizes knowledge of subject matter experts to prepare a comprehensive list of activities associated with the job duties performed by a strategy planning professional. Conducting a JTA is necessary to validate the Strategy Planning Professional (SPP) certification program. The SPP is offered by the International Association for Strategy Professionals (IASP). JTAs can also provide the basis for textbook and curriculum development to support professionalizing those working in the role of strategy planning professionals.

This study was designed and implemented to comply with current practice for JTA studies found in international standards. The American National Standards Institute (ANSI) recognizes certification programs that are governed by ISO/IEC 17024, Conformity assessment — General Requirements for Bodies Operating Certification of Persons. The ISO/IEC 17024 Standard provides guidance for developing and administering quality certification programs, including guidance for JTA studies. Referred to as certification schemes within ISO/IEC 17024, requirements for JTAs include the involvement of appropriate experts, identifying the tasks for successful performance, and identifying the competence for each task. Also stipulated within ISO/IEC 17024 are requirements for certification issuers to implement administration, financial and management best practices. For example, establishing an oversight committee and written policies and procedures for both the issuer and stakeholders are necessary requirements.

The JTA Team, consisting of subject matter experts (SMEs) knowledgeable in strategy planning, was organized for facilitated sessions and led through a process to 1) describe and define the duties of strategy professionals and 2) describe the tasks necessary to perform these duties. This qualitative assessment served as the basis for a comprehensive survey of stakeholders to validate job duties and job tasks.

The IASP Certification Commission (CC) asked one of its members with experience in “developing a curriculum process,” or DACUM⁽¹⁾, to utilize the knowledge of the JTA Team to validate the comprehensive list of duties and tasks necessary, herein referred to as the “content outline” for proper strategy planning activities.

Ref (1): Norton, R. E., & Moser, J. (2008). *DACUM Handbook* (3rd ed.). Columbus, OH: Center on Education and Training for Employment, The Ohio State University

METHODOLOGY

The activities to complete the SPP JTA are documented in this report. To begin this study, relevant materials to the SPP were reviewed. Furthermore, the goals, objectives, policies, and procedures were established for assembling and convening the JTA Team as the stakeholder group for reviewing the SPP content outline.

The activities of the JTA Team are shown in Appendix A. The Team participants were solicited to represent interests and expertise from primary stakeholders. Each Team member clearly understood their commitment and volunteer service by reviewing the committee's scope of work and functioning according to the IASP Committee policies. The Team met virtually by Zoom (using video and screen sharing) on 24 October 2024 for an orientation on project activities and the DACUM facilitation process. The meeting summaries from this meeting and all other Team meetings are presented in Appendix A.

During the orientation meeting, the Team was provided with a description of the DACUM facilitation process and its use in this instance. The Team was provided with the definition of job duties and tasks and was instructed on the difference between the two, and examples were presented. The Team was asked to validate the certification program purpose and target audience, with consensus to maintain the following:

Purpose: The Strategy Planning Professional (SPP) certification is designed for strategy professionals who work with executives, managers and their teams to formulate strategy. These candidates for SPP certification support organizational staff enterprise-wide with feedback, training and strategy follow-through.

Target Audience: strategy manager/specialist, strategic planning manager/specialist, strategic transformation manager/specialist, organization development manager specialist, organization design manager/specialist and related professions.

The Team held Zoom meetings from October 2024 to April 2025 to perform the analysis and identify the job duties and tasks areas, recognizing best practices for strategic planning. As a result of these meetings, the Team developed the content outline list. The results of these meetings are summarized in the content outline chart presented in Appendix B.

QUESTIONNAIRE DESIGN AND DISTRIBUTION

In the April 2025 timeframe, the Team, supported by staff, started drafting an online survey to validate the results of the qualitative content outline blueprint. Survey participants were asked to rate each knowledge area analytically using two rating scales, importance and frequency. Definitions of these rating scales were provided within the survey, and respondents were directed to rate each knowledge area based on their current role as strategy planning professionals. The survey is shown in Appendix C.

Sources of potential respondents were solicited from IASP members and allied organizations and are shown in Table 1. Direct emails were sent to the IASP source listing, and the survey received 54 responses. For the other sources listed in Table 1, allied organizations principals were asked to post announcements in their membership communications. For example, the announcement to Capacity Canada members yielded eight responses: on the other hand, there was no response from the Society for College and University Planning announcement. Since email lists or allied organization announcements were not matched, likely respondents may have received multiple response requests. Survey attributes were set only to allow the survey to be taken once from the same device, so any respondent could only take the survey once. The survey was distributed and kept open for approximately one month.

Table1. Validation survey distribution	
Source	Response
International Association for Strategy Professionals	54
LinkedIn IASP	16
American Society of Association Executives - strategy planning/management segments	9
Capacity Canada	8
LBL Strategies	4
Evans	2
Strategic Management Society	0
Balanced Score Card Institute	0
Council for Certification in Volunteer Administration	0
Society for College and University planning	0
Total	93

Ninety-three contacts responded to the survey. To ensure the quality of professional responses, respondents were asked to validate their selection from nine choices: “*Which areas do you focus on in the strategy shaping process?*” The validation practice is described in the next section.

CHARACTERISTICS OF THE SAMPLE

The survey's first question used logic to ensure the respondents had experience in the practice of strategic planning. Question 1 (see Appendix C) asked respondents, “*Which areas do you focus on in the strategy shaping process?*” Available choices were:

1) Macro-environment Analysis, 2) Industry and Sector Analysis, 3) Resources and Capabilities Analysis, 4) Purpose, Mission and Stakeholder Engagement, 5) Culture, Organizational Climate and Values, 6) Performance Measurement, Management, Monitoring and Improvement, 7) Project Prioritization, 8) Risk Management, 9) Collaboration, Communication, Mergers and Alliances or 10) None of the above

When the respondent chose either of the first nine choices, they were directed to complete the survey questions. Consequently, a diverse set of 93 professionals took the survey, and the results herein represent the profession of strategic planning. Otherwise, selecting “none of the above” respondents were informed about not meeting the survey criteria. These respondents were allowed to volunteer contact information for further information. The distribution of respondent practice areas is shown in Figure 1.

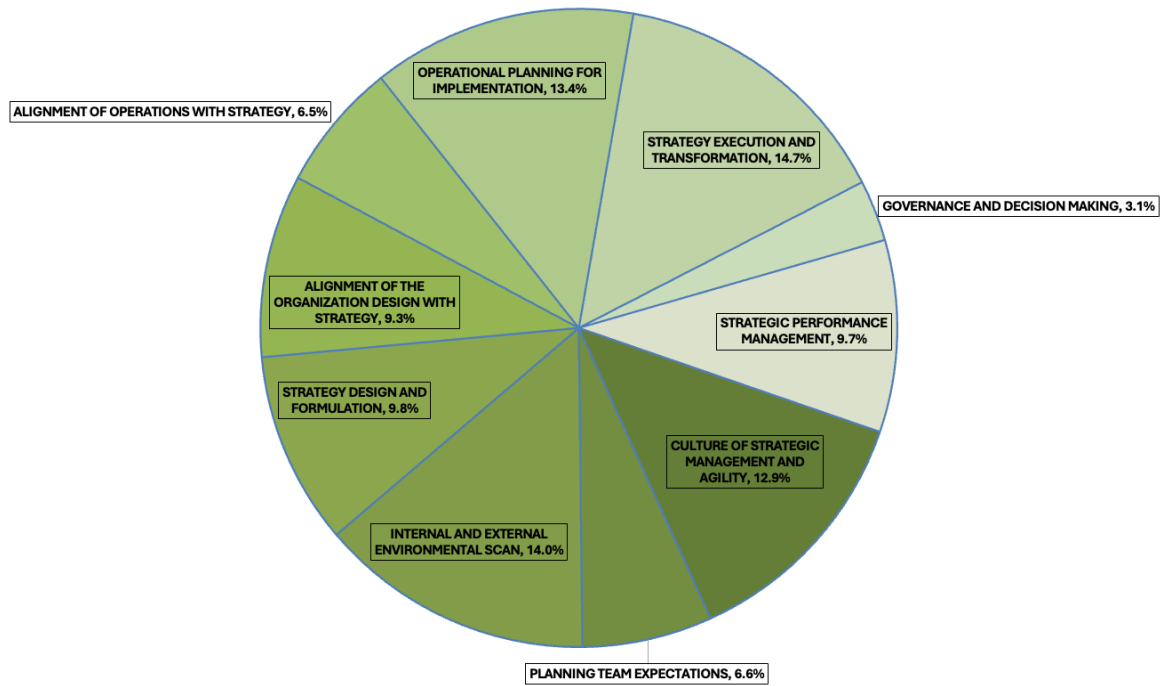


Figure 1. Work practice areas

After respondent access, the survey collected specific demographic information to establish that the study participants were a representative sample of strategic planners. Each survey participant was asked the following questions, and these questions are listed below:

- How many years of experience do you have in the field of Strategy Planning?
- Which of the following best describes your current job level?
- Which Region have you worked in the field of Strategy Planning?
- What is your age?
- What is the highest degree or level of school you have completed?
- Membership in a national or regional association?
- Do you hold any personal certifications and/or certificates?
- What continuing education courses/conferences have you attended?
- Which reference materials/regulations do you use regularly?

When asked how many years of working in the strategic planning field, 43.8 percent responded with 15 or more years of experience. The summary of responses for years of experience is shown in Table 2.

Table 2. Percentage of years of experience in the field of Strategy Planning	
Years of experience	Percent
Less than 3 years	12.5
3 - 5 years	8.3
6 - 10 years	16.7
11 - 15 years	18.8
15 + years	43.8

Survey respondents were asked to specify their job title or role within their organization. Figure 2 displays these responses, showing that most strategic planners held executive or C-suite positions at their companies. About 8 percent responded with "other" because their roles did not match the options listed on the survey. A full list of roles can be found in Appendix D. The regions where respondents have practiced the field of strategic planning is shown in Table 3

Figure 2: Which of the following best describes your current job level?

Table 3. Percentage of Region worked in the field of Strategy Planning	
Region	Percent
North America	77.1
Central America and the Caribbean	6.3
South America	6.3
Europe	6.3
Asia	12.5
Sub-Saharan Africa	14.6
Australia and Oceania	2.1
Middle East, North Africa, and Greater Arabia	10.4

When asked to report their age, approximately 54 percent of survey respondents reported being older than 55 years, and other age group responses are shown in Figure 3.

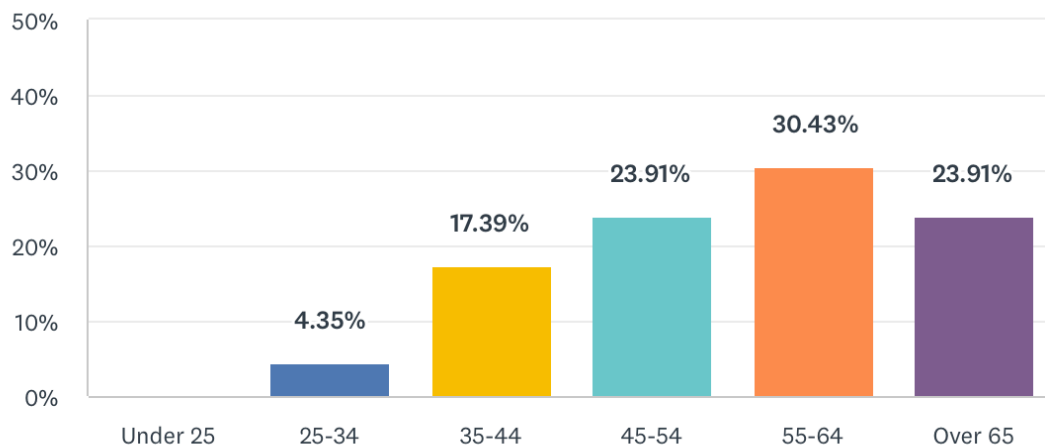


Figure 3. Reported ages of survey participants

Most survey respondents reported obtaining a master's degree, roughly 60 percent, as listed in Table 4. Strategic planners join various membership organizations to meet colleagues, share best practices, participate in professional leadership development, and attend educational programs. The top respondents' memberships are the International Association for Strategy Professionals, as shown in Table 5. Approximately 23 percent indicate that they belong to other organizations, which are listed in Appendix E. Survey respondents were asked if they hold credentials or certifications, and the top two were IASP's Strategy Planning Professional and PMI's Project Management Professional. Approximately 51 percent responded that they held other credentials/certifications as shown in Table 6, which are listed in Appendix F.

Table 4. Highest level of education reported by survey respondents	
Education	Percent
Master's degree	59.6
Doctoral degree	19.1
Bachelor's degree	14.9
Associates degree	0
Other ⁽¹⁾	6.4

Table 5. Membership in national or regional association	
Organization	Percent
International Association for Strategy Professionals	71.8
Association of Change Management Professionals	7.7
Strategic Management Society	5.1
Council for Certification in Volunteer Administration	2.6
Other ⁽¹⁾	23.1
See Appendix E	

Table 6. Personal certifications and/or certificates Recognition	
Recognition	Percent
Strategy Planning Professional	40.5
Project Management Professional	24.3
Certified Association Executive	5.4
Certified Change Management Professional	2.7
PMI Agile Certified Practitioner	5.4
Certified in Management	2.7
Certified Supply Chain Professional	2.7
Other ⁽¹⁾	51.4
See Appendix F	

Respondents were asked about their attendance at education programs and conferences, listed in Table 7. Approximately 32 percent responded to attending other conferences; their responses are listed in Appendix G. Survey respondents were asked about the reference materials used regularly and the summary of responses for reference use is shown in Table 8. About 24 percent of respondents indicated using other references listed in Appendix H.

Table 7. Attendance at conferences	
Conference	Percent
International Association for Strategy Professionals Annual Conference	71.4
American Society of Association Executives Annual Conference	21.4
Annual Conference for the Association for Research of Non-profit Organizations and Volunteer Action	7.1
Association of Association Executives - Europe	3.6
World Business Forum	10.7
International Conference on Business Management, Economics, and Information Systems	7.1
Strategy World	3.6
Annual Conference Strategic Management Society	7.1
Change Management Global Connect Annual Conference	3.6
Other ⁽¹⁾	32.1
See Appendix G	

Table 8. Reference materials	
Reference	Percent
Strategy In The 21st Century by Randall Rollinson and Earl Young	51.4
IASP Body of Knowledge (BoK) 3.0 September 2024	81.1
Is this Strategy Working? The Essential Guide to Strategy Development, Evaluation, and Goal Achievement by Dr Lewis Atkinson and Barbara Collins	13.5
The Institute Way: Simplify Strategic Planning and Management with the Balanced Scorecard by Howard Rohm, David Wilsey, Gail Stout Perry, and Dan Montgomery	24.3
Exploring Strategy by Whittington, Johnson et al	10.8
Strategy: Theory and Practice Fourth Edition by Clegg et al	135
Other ⁽¹⁾	24.3
See Appendix H	

Before exiting the survey, respondents were asked whether any content outline areas were missing from the survey. The majority of respondents, about 80 percent, stated that there were no missing knowledge areas. Nine respondents did indicate there might be missing content areas shown in Appendix I. After Job Task Analysis Team review, all comments were mapped to content outlines areas.

OBSERVATION ON DEMOGRAPHICS

Observations of the demographic data reveal an aging workforce with single-professional consulting companies. These professionals are well educated with many years of experience. At the report review discussion, the Job Task Analysis Team agreed that this is the current state of the profession today. Although, the demographic data may be skewed since about 50 percent chose the working role of executive and senior and it's expected that this specific group is well educated with many years of experience. Regardless, the consensus target goal is to qualify strategic planning professionals. The current workforce of older experienced professionals can become mentors and support younger professionals entering the strategic planning profession.

EVALUATION OF KNOWLEDGE AREAS

The survey collected information on the duties and tasks by strategic planning professionals, and respondents were asked to rate each task area on two dimensions – Importance and Frequency. These are defined below:

- Importance - notwithstanding the amount of time required to address them, how important are these content areas, or tasks, to the function of strategy planning?
 - Frequency - estimate how often strategic planning professionals use these content areas
- The importance and frequency scales are shown in Table 9.

Table 9. Task area rating scales	
Importance	Frequency
Not important = 1	Never perform = 1
Somewhat important = 2	Sometimes perform = 2
Important = 3	Often perform = 3
Very important = 4	Always perform = 4

Table 10 lists the mean, standard deviation (SD), and standard error of the mean (SEM) for each content by the knowledge area rating scale listed in Table 9. The standard error of the mean was computed for each of the knowledge areas by each of the rating scales. For content areas, the standard error of the mean was mainly in 10 percent range or less, indicating that if the survey were to be repeated with a different sample of survey respondents, the results would be approximately the same.

Task areas were tabulated, and all task areas were deemed to be of “Important”, indicated by a mean rating of greater than 3.0. On the other hand, there are task areas calculated as “Somewhat important” indicated by a mean rating less than 3.0. The JTA Team reviewed these task areas and decided not to remove any. Discussion comments on specific duty and task areas are as follows, with Team consensus to keep these task areas as is.

- *Provide support to unit personnel throughout change cycles.* Strategy professionals are expected to possess knowledge and cultural acumen to support implementations.
- *Design and deliver organization-wide training programs aligned with the strategic direction.* Strategy professionals ensure training programs are relevant; whether they provide training is a company decision.
- *Collaborate with marketing function to analyze customer segments and share findings.* Strategy professionals' objectivity is necessary to understand the importance of relevant customer data, which can be challenging to collect and interpret.
- *Assist in preparing plans to communicate environmental metrics to teams. (metrics determine by client – base org).* Strategy professionals are expected to clearly communicate relevant data.

The JTA Team acknowledged the frequency ratings below 3.0, Sometimes perform, and noted that many tasks rated as Important were also rated as Sometimes perform. Team consensus was that these tasks, while not performed regularly, represent critical or high-impact activities that must remain in the role definition due to their importance when they do occur.

Table 10. Mean, standard deviation, and standard error of the mean for each content areas area by knowledge area rating scale						
Knowledge area	Importance			Frequency		
	Mean	SD	SEM	Mean	SD	SEM
1A CULTURE OF STRATEGIC MANAGEMENT AND AGILITY						
Lead tactical and project planning efforts within a business unit, ensuring alignment with the strategic plan.	3.42	0.82	0.10	2.64	0.90	0.13
Cultivate a mindset of strategic leadership, agility and ownership.	3.61	0.58	0.07	3.30	0.74	0.10
Facilitate the development of unit plans across all organizational levels.	3.29	0.86	0.11	2.76	0.89	0.13
Provide support to unit personnel throughout change cycles.	2.97	0.87	0.11	2.71	1.02	0.15
Lead processes to identify and decide upon strategic options.	3.60	0.68	0.08	3.38	0.70	0.10
Lead strategic planning reviews to foster continuous enhancement of business and departmental planning.	3.57	0.72	0.09	3.16	0.91	0.13
Design and deliver organization-wide training programs aligned with the strategic direction.	2.88	0.91	0.11	2.34	0.92	0.13
Develop a strategy evaluation and improvement process that is continuous.	3.53	0.63	0.08	2.96	0.92	0.13
1B PLANNING TEAM EXPECTATIONS						

Table 10. Mean, standard deviation, and standard error of the mean for each content areas area by knowledge area rating scale						
Knowledge area	Importance			Frequency		
	Mean	SD	SEM	Mean	SD	SEM
Facilitate a corporate planning team to ensure the effective integration of planning and strategic management knowledge, timing, outcomes, processes, and infrastructures organization-wide.	3.63	0.70	0.09	3.06	1.08	0.15
Orient assembled planning team to the planning process.	3.39	0.82	0.10	3.14	1.01	0.14
Provide actionable feedback to support planning team members in maximizing their individual and team performance.	3.27	0.78	0.10	2.98	0.91	0.13
Advise leaders on strategies to engage staff and communicate the value of change to mitigate resistance.	3.29	0.80	0.10	3.06	0.87	0.12
2A INTERNAL AND EXTERNAL ENVIRONMENTAL SCAN						
Collect and share resource data to support strategy planning by organizational teams.	3.26	0.80	0.10	3.14	0.86	0.12
Support process evaluations by gathering insights and contributing recommendations.	3.13	0.86	0.10	2.94	0.84	0.12
Gather and assess data on internal and external factors to inform strategy decisions.	3.61	0.60	0.07	3.32	0.77	0.11
Collaborate with marketing function to analyze customer segments and share findings. (leveraging functions)	2.96	0.86	0.11	2.42	0.99	0.14
Assist in preparing plans to communicate environmental metrics to teams. (metrics determine by client – base org).	2.94	0.86	0.10	2.58	0.93	0.13
Research and share benchmarking data to guide strategy discussions.	3.00	0.80	0.10	2.74	0.99	0.14
Analyze and summarize customer data to support strategic follow-through.	3.25	0.77	0.09	2.76	0.92	0.13
Support change readiness assessments by providing data and suggestions.	3.00	0.86	0.10	2.59	1.04	0.15
Present data clearly to help teams apply insights effectively.	3.54	0.68	0.08	3.22	0.86	0.12
2B STRATEGY DESIGN AND FORMULATION						
Contribute to identifying core competencies and value propositions to support competitive strategy	3.55	0.68	0.08	3.29	0.84	0.12
Collaborate with leadership to draft and refine vision and mission statements.	3.65	0.72	0.09	3.42	0.88	0.12
Assist with economic and portfolio analyses to evaluate strategic options.	3.06	0.90	0.11	2.66	1.10	0.16
Support analyses of industry trends and organizational structures to align with strategy.	3.32	0.78	0.09	3.00	1.03	0.15
Contribute to evaluating options for revenue growth and cost efficiency.	3.04	0.86	0.10	2.72	1.16	0.16
Contribute to designing feedback systems to assess strategy effectiveness.	3.41	0.65	0.08	2.96	0.90	0.13
3A ALIGNMENT OF THE ORGANIZATION DESIGN WITH STRATEGY						
Educate managers in the organization design/ redesign principles and their relationship to the success of strategy execution and management.	3.33	0.79	0.10	2.77	0.99	0.14
Identify organization structures affected by the proposed strategy.	3.42	0.68	0.09	2.83	0.87	0.13
Contribute to the redesign of the organization and alignment with the new strategy.	3.35	0.79	0.10	2.69	0.93	0.13
Plan and sequence changes transpired from organizational redesign.	3.19	0.77	0.10	2.32	0.96	0.14
Enable employee engagement and attunement of their hearts and minds in support of the strategic direction.	3.19	0.85	0.11	2.65	0.91	0.13
Assess the impact of organization design to corporate culture and recommend mitigation for gaps.	3.18	0.85	0.11	2.60	0.87	0.13
3B ALIGNMENT OF OPERATIONS WITH STRATEGY						
Facilitate the alignment of enterprise-wide operational plans with the organization's strategy.	3.50	0.66	0.09	2.94	0.96	0.14
Assess internal operational processes to identify actions necessary to close the gap between the current state and the desired state.	3.34	0.77	0.10	2.77	0.94	0.14
Assess what capital resources, technology or capabilities are needed to implement the strategy.	3.48	0.66	0.09	2.79	0.88	0.13

Table 10. Mean, standard deviation, and standard error of the mean for each content areas area by knowledge area rating scale						
Knowledge area	Importance			Frequency		
	Mean	SD	SEM	Mean	SD	SEM
Promote the value of organizational changes that support strategy development and execution.	3.32	0.69	0.09	3.09	0.88	0.13
3C OPERATIONAL PLANNING FOR IMPLEMENTATION						
Assist the management team in developing a clear strategic change agenda, common framework, and language.	3.62	0.59	0.08	3.19	0.79	0.11
Facilitate the development of an actionable plan from the organization's strategies.	3.69	0.54	0.07	3.44	0.71	0.10
Identify specific activities and resources needed to realize the organization's strategies.	3.64	0.59	0.08	3.27	0.84	0.12
Help build and create management ownership of a viable operational plan for change.	3.56	0.60	0.08	3.13	0.79	0.11
Determine and allocate resources, finances, and timelines for each activity.	3.04	0.92	0.12	2.56	1.11	0.16
Integrate, communicate, and cascade all the strategic planning components into an annual planning and budgeting process across and down the entire organization.	3.44	0.71	0.10	2.71	1.05	0.15
Leverage, align, and cascade the business strategy into multi-year business plans for departments and major functional areas.	3.35	0.89	0.12	2.60	1.16	0.17
Identify desired outcomes for each activity.	3.60	0.66	0.09	3.17	0.86	0.12
4A STRATEGY EXECUTION AND TRANSFORMATION						
Facilitate development of strategy-aligned projects and annual plans	3.46	0.69	0.09	3.10	0.83	0.12
Engage with critical stakeholders, both internal and external	3.61	0.62	0.08	3.56	0.71	0.10
Help develop organization-wide strategic and transition planning activities	3.45	0.76	0.10	3.23	0.78	0.11
Assist in developing and implementing a change management program that informs and engages stakeholders.	3.05	0.80	0.11	2.69	0.85	0.12
Recommend a portfolio management system to support selection, execution and monitoring of strategy plan initiatives	3.00	0.94	0.13	2.46	1.09	0.16
Serve as the trusted advisor to project and change management teams as they implement the strategic initiatives.	3.35	0.78	0.10	2.94	0.98	0.14
Assist management in developing and executing an annual implementation and review process that drives continuous improvement.	3.34	0.72	0.10	3.02	0.96	0.14
Promote teamwork, change management, and project management skills throughout the strategy implementation effort	3.27	0.75	0.10	3.17	0.86	0.12
Anticipate changes that could impact successful execution of the strategy.	3.57	0.60	0.08	3.23	0.78	0.11
4B GOVERNANCE AND DECISION MAKING						
Contribute to the creation of a governance plan	3.33	0.91	0.13	2.74	1.10	0.16
Validate coherence and alignment of modifications to the governance plan	3.29	0.92	0.12	2.46	1.15	0.17
4C STRATEGIC PERFORMANCE MANAGEMENT						
Facilitate management in identifying the performance metrics and targets for strategic initiatives.	3.64	0.59	0.08	3.33	0.78	0.11
Design and report strategy performance dashboards and identify information sources.	3.32	0.74	0.10	2.87	1.07	0.16
Facilitate strategy review meetings.	3.43	0.83	0.11	3.04	1.07	0.15
Support communications to managers and employees about progress being made towards achieving the strategy.	3.38	0.80	0.11	2.94	0.95	0.14
Evaluate the KPI data and trends to determine if strategies are on track and identify improvements	3.36	0.77	0.10	2.73	1.16	0.17
Evaluate the change management effectiveness.	3.11	0.87	0.12	2.56	1.07	0.15

OVERALL RATING SCALE

The ratings of importance and frequency were combined for an overall rating, where the rating is defined as twice the importance plus frequency⁽²⁾:

$$R = 2*I + F$$

where,

R = Rating

I = Importance

F = frequency

Ref (2): Adrienne W. Cadle (2012), *The Relationship between Rating Scales used to Evaluate Tasks from Task Inventories for Licensure and Certification Examinations*, University of South Florida.

The overall rating is used to calculate the percent weight for each knowledge area and from these, the percent weight of each task area. The computed ratings and weights for knowledge areas are shown in Table 8. Percent weighting was calculated by dividing individual ratings by the total rating value. Using the computed percent weighting for each task area, a draft content outline is provided in Appendix J.

Table 11. Overall task area rating and percent weighting		
Task area	Overall rating	Percent weighting
1A CULTURE OF STRATEGIC MANAGEMENT AND AGILITY		12.93%
Lead tactical and project planning efforts within a business unit, ensuring alignment with the strategic plan.	9.48	1.59%
Cultivate a mindset of strategic leadership, agility and ownership.	10.52	1.77%
Facilitate the development of unit plans across all organizational levels.	9.34	1.57%
Provide support to unit personnel throughout change cycles.	8.65	1.45%
Lead processes to identify and decide upon strategic options.	10.57	1.78%
Lead strategic planning reviews to foster continuous enhancement of business and departmental planning.	10.29	1.73%
Design and deliver organization-wide training programs aligned with the strategic direction.	8.10	1.36%
Develop a strategy evaluation and improvement process that is continuous.	10.02	1.68%
1B PLANNING TEAM EXPECTATIONS		6.62%
Facilitate a corporate planning team to ensure the effective integration of planning and strategic management knowledge, timing, outcomes, processes, and infrastructures organization-wide.	10.32	1.73%
Orient assembled planning team to the planning process.	9.93	1.67%
Provide actionable feedback to support planning team members in maximizing their individual and team performance.	9.53	1.60%
Advise leaders on strategies to engage staff and communicate the value of change to mitigate resistance.	9.64	1.62%

Table 11. Overall task area rating and percent weighting		
Task area	Overall rating	Percent weighting
2A INTERNAL AND EXTERNAL ENVIRONMENTAL SCAN		13.95%
Collect and share resource data to support strategy planning by organizational teams.	9.67	1.62%
Support process evaluations by gathering insights and contributing recommendations.	9.20	1.54%
Gather and assess data on internal and external factors to inform strategy decisions.	10.54	1.77%
Collaborate with marketing function to analyze customer segments and share findings	8.33	1.40%
Assist in preparing plans to communicate environmental metrics to teams. (metrics determine by client – base org).	8.46	1.42%
Research and share benchmarking data to guide strategy discussions.	8.74	1.47%
Analyze and summarize customer data to support strategic follow-through.	9.25	1.55%
Support change readiness assessments by providing data and suggestions.	8.59	1.44%
Present data clearly to help teams apply insights effectively.	10.29	1.73%
2B STRATEGY DESIGN AND FORMULATION		9.76%
Contribute to identifying core competencies and value propositions to support competitive strategy	10.39	1.74%
Collaborate with leadership to draft and refine vision and mission statements.	10.72	1.80%
Assist with economic and portfolio analyses to evaluate strategic options.	8.78	1.47%
Support analyses of industry trends and organizational structures to align with strategy.	9.64	1.62%
Contribute to evaluating options for revenue growth and cost efficiency.	8.81	1.48%
Contribute to designing feedback systems to assess strategy effectiveness.	9.77	1.64%
3A ALIGNMENT OF THE ORGANIZATION DESIGN WITH STRATEGY		9.27%
Educate managers in the organization design/ redesign principles and their relationship to the success of strategy execution and management.	9.44	1.58%
Identify organization structures affected by the proposed strategy.	9.67	1.62%
Contribute to the redesign of the organization and alignment with the new strategy.	9.39	1.58%
Plan and sequence changes transpired from organizational redesign.	8.71	1.46%
Enable employee engagement and attunement of their hearts and minds in support of the strategic direction.	9.03	1.52%
Assess the impact of organization design to corporate culture and recommend mitigation for gaps.	8.96	1.50%
3B ALIGNMENT OF OPERATIONS WITH STRATEGY		6.53%
Facilitate the alignment of enterprise-wide operational plans with the organization's strategy.	9.94	1.67%
Assess internal operational processes to identify actions necessary to close the gap between the current state and the desired state.	9.44	1.59%
Assess what capital resources, technology or capabilities are needed to implement the strategy.	9.75	1.64%
Promote the value of organizational changes that support strategy development and execution.	9.73	1.63%
3C OPERATIONAL PLANNING FOR IMPLEMENTATION		13.42%
Assist the management team in developing a clear strategic change agenda, common framework, and language.	10.42	1.75%
Facilitate the development of an actionable plan from the organization's strategies.	10.82	1.82%
Identify specific activities and resources needed to realize the organization's strategies.	10.54	1.77%
Help build and create management ownership of a viable operational plan for change.	10.25	1.72%
Determine and allocate resources, finances, and timelines for each activity.	8.64	1.45%
Integrate, communicate, and cascade all the strategic planning components into an annual planning and budgeting process across and down the entire organization.	9.58	1.61%
Leverage, align, and cascade the business strategy into multi-year business plans for departments and major functional areas.	9.30	1.56%
Identify desired outcomes for each activity.	10.37	1.74%

Table 11. Overall task area rating and percent weighting		
Task area	Overall rating	Percent weighting
4A STRATEGY EXECUTION AND TRANSFORMATION		14.71%
Facilitate development of strategy-aligned projects and annual plans	10.03	1.68%
Engage with critical stakeholders, both internal and external	10.78	1.81%
Help develop organization-wide strategic and transition planning activities	10.12	1.70%
Assist in developing and implementing a change management program that informs and engages stakeholders.	8.80	1.48%
Recommend a portfolio management system to support selection, execution and monitoring of strategy plan initiatives	8.46	1.42%
Serve as the trusted advisor to project and change management teams as they implement the strategic initiatives.	9.63	1.62%
Assist management in developing and executing an annual implementation and review process that drives continuous improvement.	9.70	1.63%
Promote teamwork, change management, and project management skills throughout the strategy implementation effort	9.70	1.63%
Anticipate changes that could impact successful execution of the strategy.	10.37	1.74%
4B GOVERNANCE AND DECISION MAKING		3.10%
Contribute to the creation of a governance plan	9.41	1.58%
Validate coherence and alignment of modifications to the governance plan	9.04	1.52%
4C STRATEGIC PERFORMANCE MANAGEMENT		9.73%
Facilitate management in identifying the performance metrics and targets for strategic initiatives.	10.62	1.78%
Design and report strategy performance dashboards and identify information sources.	9.51	1.60%
Facilitate strategy review meetings.	9.90	1.66%
Support communications to managers and employees about progress being made towards achieving the strategy.	9.69	1.63%
Evaluate the KPI data and trends to determine if strategies are on track and identify improvements	9.44	1.59%
Evaluate the change management effectiveness.	8.78	1.47%

SUMMARY

This report documents a survey, or job task analysis, to validate the Strategy Planning Professional Job Description. The job task analysis utilized the expertise of subject matter experts – the JTA Team – to prepare a comprehensive list of activities associated with the job duties performed by the Strategy Planning Professional. Table 12 provides a summary of content domains and their percent contribution to Strategy Planning job duties. Periodic job task analyses are necessary for the maintenance of certification programs. The job task analysis can also provide the basis for textbook and curriculum development in support of strategy planning professionals. Additionally, the data herein can support gap analyses of current education offerings and current publications.

Table 12. Summary of content domains	
Domain	Percent weight

1A CULTURE OF STRATEGIC MANAGEMENT AND AGILITY	12.9%
1B PLANNING TEAM EXPECTATIONS	6.6%
2A INTERNAL AND EXTERNAL ENVIRONMENTAL SCAN	14.0%
2B STRATEGY DESIGN AND FORMULATION	9.8%
3A ALIGNMENT OF THE ORGANIZATION DESIGN WITH STRATEGY	9.3%
3B ALIGNMENT OF OPERATIONS WITH STRATEGY	6.5%
3C OPERATIONAL PLANNING FOR IMPLEMENTATION	13.4%
4A STRATEGY EXECUTION AND TRANSFORMATION	14.7%
4B GOVERNANCE AND DECISION MAKING	3.1%
4C STRATEGIC PERFORMANCE MANAGEMENT	9.7%

APPENDIX LISTING

- Appendix A – Job Task Analysis Team activities
- Appendix B – Qualitative: DACUM for tasks areas
- Appendix C – Validation survey
- Appendix D – Specific work roles
- Appendix E – Membership in a national or regional association
- Appendix F – Credentials and certifications
- Appendix G – Continuing education/conferences
- Appendix H – Reference materials/regulations
- Appendix I – Other task areas
- Appendix J – SPP Content Outline

Appendix A

Job Task Analysis Strategy Planning Professional (SPP) Strategy Management Professional (SMP)

The Job Task Analysis utilizes the knowledge of subject matter experts (SMEs) to prepare a comprehensive list of activities associated with the job duties performed by a Strategy Planning Professional and a Strategy Management Professional. This is accomplished through systematic dialog with SMEs via teleconferences and other correspondence. Once this job duties list is fully vetted with the Certification Commission, an online survey will be used to confirm the content of the JTA. The survey results will be used to determine the weighting of tasks for the SPP and SMP credential blueprint. This blueprint becomes the deliverable for this practice analysis project. The Certification Commission, SMEs, and Staff will be apprised of progress throughout project activities. The following tasks, shown below, implement the scope of work.

Program Review—This task will review the relevant SPP and SMP program background, which are the program's governing documents.

Qualitative job duties analysis through SMEs – Critical to this Practice Analysis is utilizing the knowledge of SMEs to prepare a comprehensive list of activities associated with the job duties performed by SPP and SMP. This is accomplished through systematic dialog with identified SMEs via teleconferences and other correspondence. **Deliverable:** Meeting minutes, Qualitative Job Duties Report.

JTA survey development – An online survey will be created to validate the job duties described in the Qualitative Job Duties Report. The survey will be made using an Internet survey software system. **Deliverable:** Draft JTA Survey.

Validation survey distribution – The survey will gather statistics on duties and tasks via the Internet survey software. Sources of potential respondents will be solicited from SPP and SMP certificants, IASP members, and other interested parties as identified. Once the survey is delivered, it will be open for responses for approximately one month. **Deliverable:** Survey distribution and response report.

Analysis of JTA survey results – The results of the JTA survey will be used to determine the weighting of tasks identified within the Qualitative Job Duties Report. Using the study accumulated scale ratings, the mean, standard deviation, and standard error of the mean rating for each task area will be calculated and discussed with the SME group to determine if any areas should be modified or removed. Once risk values are estimated, task areas can be weighted to establish the blueprint reflecting the skills, knowledge, and abilities required for competent job performance. **Deliverable:** Evaluation of task areas; estimates of risk.

Confirmation of JTA survey results – The JTA analysis results are the basis for revising the draft content outline for the SSP and SMP. The draft JTA analysis will be presented to leadership for review and comment. **Deliverable:** Presentation on JTA analysis.

Development of draft JTA report—The JTA report documents the qualitative analysis, results from the SME activities, and the quantitative analysis of survey results and documents the development of the standard job description. It contains sections on methodology, survey respondents' demographics, duties and tasks' evaluation, and risk values estimates. **Deliverable:** Draft JTA analysis report.

Appendix B

Draft SPP Certification Outline 2025

Domain 1	ENGAGEMENT
1A	CULTURE OF STRATEGIC MANAGEMENT AND AGILITY
1A1	Lead tactical and project planning efforts within a business unit, ensuring alignment with the strategic plan.
1A2	Cultivate a mindset of strategic leadership, agility and ownership.
1A3	Facilitate the development of unit plans across all organizational levels.
1A4	Provide support to unit personnel throughout change cycles.
1A5	Lead processes to identify and decide upon strategic options.
1A6	Lead strategic planning reviews to foster continuous enhancement of business and departmental planning.
1A7	Design and deliver organization-wide training programs aligned with the strategic direction.
1A8	Develop a strategy evaluation and improvement process that is continuous.
1B	PLANNING TEAM EXPECTATIONS
1B1	Facilitate a corporate planning team to ensure the effective integration of planning and strategic management knowledge, timing, outcomes, processes, and infrastructures organization-wide.
1B2	Orient assembled planning team to the planning process.
1B3	Provide actionable feedback to support planning team members in maximizing their individual and team performance.
1B4	Advise leaders on strategies to engage staff and communicate the value of change to mitigate resistance.
Domain 2	STRATEGY FORMULATION
2A	INTERNAL AND EXTERNAL ENVIRONMENTAL SCAN
2A1	Collect and share resource data to support strategy planning by organizational teams.
2A2	Support process evaluations by gathering insights and contributing recommendations.
2A3	Gather and assess data on internal and external factors to inform strategy decisions.
2A4	Collaborate with marketing function to analyze customer segments and share findings. (leveraging functions)
2A5	Assist in preparing plans to communicate environmental metrics to teams. (metrics determine by client – base org)
2A6	Research and share benchmarking data to guide strategy discussions.
2A7	Analyze and summarize customer data to support strategic follow-through.
2A8	Support change readiness assessments by providing data and suggestions.
2A9	Present data clearly to help teams apply insights effectively.
2B	STRATEGY DESIGN AND FORMULATION
2B1	Contribute to identifying core competencies and value propositions to support competitive strategy.
2B2	Collaborate with leadership to draft and refine vision and mission statements.
2B3	Assist with economic and portfolio analyses to evaluate strategic options.
2B4	Support analyses of industry trends and organizational structures to align with strategy.

Draft SPP Certification Outline 2025

2B5	Contribute to evaluating options for revenue growth and cost efficiency.
2B6	Contribute to designing feedback systems to assess strategy effectiveness.
Domain 3	PREPARATION FOR STRATEGY INTEGRATION
3A	ALIGNMENT OF THE ORGANIZATION DESIGN WITH STRATEGY
3A1	Educate managers in the organization design/ redesign principles and their relationship to the success of strategy execution and management.
3A2	Identify organization structures affected by the proposed strategy.
3A3	Contribute to the redesign of the organization and alignment 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 build and create management ownership of a viable operational plan for change.
3C5	Determine and allocate 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 AND EVALUATION
4A	STRATEGY EXECUTION AND TRANSFORMATION
4A1	Facilitate development of strategy-aligned projects and annual plans
4A2	Engage with critical stakeholders, both internal and external
4A3	Help develop organization wide strategic and transition planning activities
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 selection, execution and monitoring of strategy plan initiatives
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	Promote teamwork, change management and project management skills throughout the strategy implementation effort

Draft SPP Certification Outline 2025

4A9	Anticipate changes that could impact successful execution of the strategy
4B	GOVERNANCE AND DECISION MAKING
4B1	OK: Contribute to the creation of a governance plan
4B2	OK: Validate coherence and alignment of modifications to the governance plan
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.

Appendix C

Strategy Planning Job Task Analysis Survey

Introduction

Survey Objective: To determine the essential duties and tasks required for a competent strategy planning professional.

While strategy professionals work in a variety of settings and specialties, this survey depends on your perspectives regarding the role of a strategy planning professional.

The survey takes approximately 20 minutes to complete and is divided into three (3) sections:

1. Task ratings - Domains and content outlines pertaining to Strategy Planning Professionals are separated into two parts:

- a. Importance - notwithstanding the amount of time required to address them, how important are these content areas, or tasks, to the function of strategy planning?
- b. Frequency - estimate how often strategic planning professionals use these content areas

2. Additional Comments - If you feel there are areas that were not included, you will have an opportunity to provide feedback.

3. Demographic information - The information you provide in this section will be used to ensure a representative sample.

Your individual responses will be kept confidential. We appreciate your assistance. If you have any difficulty responding to the survey, please contact Dean Black at certificationdirector@strategyassociation.org or phone Dean at 613-612-7223 (WhatsApp)

* 1. Validation: Which areas do you focus on in the strategy shaping process? (check all that apply)?

- ☐ Macro-environment Analysis
- ☐ Industry and Sector Analysis
- ☐ Resources and Capabilities Analysis
- ☐ Purpose, Mission and Stakeholder Engagement
- ☐ Culture, Organizational Climate and Values
- ☐ Performance Measurement, Management, Monitoring and Improvement
- ☐ Project Prioritization
- ☐ Risk Management
- ☐ Collaboration, Communication, Mergers and Alliances
- ☐ None of the above

Strategy Planning Job Task Analysis Survey

Thank you for your interest in this important study. At this time, however, you do not yet meet the study criteria.

Strategy Planning Job Task Analysis Survey

Strategy planning professional Domain and Content Outlines - IMPORTANCE RATING

Importance: Importance is defined as the degree to which knowledge of this subject is essential to the role of a competent strategy planning professional.

Please indicate how important each knowledge area is based on the following rating scale: 1. Not important 2. Somewhat important 3. Important 4. Very important

Remember: Strategy professionals work in a variety of settings and specialties. This survey depends on your individual experience relating to your current role within the strategy planning profession.

What follows are 10 Domains with their related content areas; please rate the Importance of each knowledge area.

2. DOMAIN 1A: CULTURE OF STRATEGIC MANAGEMENT AND AGILITY

	Not important	Somewhat importance	Important	Very Important
Lead tactical and project planning efforts within a business unit, ensuring alignment with the strategic plan.	☐	☐	☐	☐
Cultivate a mindset of strategic leadership, agility and ownership.	☐	☐	☐	☐
Facilitate the development of unit plans across all organizational levels.	☐	☐	☐	☐
Provide support to unit personnel throughout change cycles.	☐	☐	☐	☐
Lead processes to identify and decide upon strategic options.	☐	☐	☐	☐
Lead strategic planning reviews to foster continuous enhancement of business and departmental planning.	☐	☐	☐	☐
Design and deliver organization-wide training programs aligned with the strategic direction.	☐	☐	☐	☐
Develop a strategy evaluation and improvement process that is continuous.	☐	☐	☐	☐

3. DOMAIN 1B PLANNING TEAM EXPECTATIONS

	Not important	Somewhat importance	Important	Very Important
Facilitate a corporate planning team to ensure the effective integration of planning and strategic management knowledge, timing, outcomes, processes, and infrastructures organization-wide.	☐	☐	☐	☐
Orient assembled planning team to the planning process.	☐	☐	☐	☐
Provide actionable feedback to support planning team members in maximizing their individual and team performance.	☐	☐	☐	☐
Advise leaders on strategies to engage staff and communicate the value of change to mitigate resistance.	☐	☐	☐	☐

4. DOMAIN 2A INTERNAL AND EXTERNAL ENVIRONMENTAL SCAN

	Not important	Somewhat importance	Important	Very important
Collect and share resource data to support strategy planning by organizational teams.	☐	☐	☐	☐
Support process evaluations by gathering insights and contributing recommendations.	☐	☐	☐	☐
Gather and assess data on internal and external factors to inform strategy decisions.	☐	☐	☐	☐
Collaborate with marketing function to analyze customer segments and share findings. (leveraging functions)	☐	☐	☐	☐
Assist in preparing plans to communicate environmental metrics to teams. (metrics determine by client – base org)	☐	☐	☐	☐
Research and share benchmarking data to guide strategy discussions.	☐	☐	☐	☐
Analyze and summarize customer data to support strategic follow-through.	☐	☐	☐	☐
Support change readiness assessments by providing data and suggestions.	☐	☐	☐	☐
Present data clearly to help teams apply insights effectively.	☐	☐	☐	☐

5. DOMAIN 2B STRATEGY DESIGN AND FORMULATION

	Not important	Somewhat importance	Important	Very important
Contribute to identifying core competencies and value propositions to support competitive strategy.	☐	☐	☐	☐
Collaborate with leadership to draft and refine vision and mission statements.	☐	☐	☐	☐
Assist with economic and portfolio analyses to evaluate strategic options.	☐	☐	☐	☐
Support analyses of industry trends and organizational structures to align with strategy.	☐	☐	☐	☐
Contribute to evaluating options for revenue growth and cost efficiency.	☐	☐	☐	☐
Contribute to designing feedback systems to assess strategy effectiveness.	☐	☐	☐	☐

Strategy Planning Job Task Analysis Survey

Strategy Planning Professional Domain and Content Outlines - IMPORTANCE RATING

Remember: Strategy professionals work in a variety of settings and specialties. This survey depends on your individual experience relating to your current role within the strategy planning profession.

Importance: Importance is defined as the degree to which knowledge of this subject is essential to the role of a competent strategy planning professional.

Please indicate how important each knowledge area is based on the following rating scale: **1. Not important 2. Somewhat important 3. Important 4. Very important**

6. DOMAIN 3A ALIGNMENT OF THE ORGANIZATION DESIGN WITH STRATEGY

	Not important	Somewhat importance	Important	Very Important
Educate managers in the organization design/ redesign principles and their relationship to the success of strategy execution and management.	☐	☐	☐	☐
Identify organization structures affected by the proposed strategy.	☐	☐	☐	☐
Contribute to the redesign of the organization and alignment with the new strategy.	☐	☐	☐	☐
Plan and sequence changes transpired from organizational redesign.	☐	☐	☐	☐
Enable employee engagement and attunement of their hearts and minds in support of the strategic direction.	☐	☐	☐	☐
Assess the impact of organization design to corporate culture and recommend mitigation for gaps.	☐	☐	☐	☐

7. DOMAIN 3B ALIGNMENT OF OPERATIONS WITH STRATEGY

	Not important	Somewhat importance	Important	Very Important
Facilitate the alignment of enterprise-wide operational plans with the organization's strategy.	☐	☐	☐	☐
Assess internal operational processes to identify actions necessary to close the gap between the current state and the desired state.	☐	☐	☐	☐
Assess what capital resources, technology or capabilities are needed to implement the strategy.	☐	☐	☐	☐
Promote the value of organizational changes that support strategy development and execution.	☐	☐	☐	☐

8. DOMAIN 3C OPERATIONAL PLANNING FOR IMPLEMENTATION

	Not important	Somewhat importance	Important	Very Important
Assist the management team in developing a clear strategic change agenda, common framework, and language.	☐	☐	☐	☐
Facilitate the development of an actionable plan from the organization's strategies.	☐	☐	☐	☐
Identify specific activities and resources needed to realize the organization's strategies.	☐	☐	☐	☐
Help build and create management ownership of a viable operational plan for change.	☐	☐	☐	☐
Determine and allocate resources, finances, and timelines for each activity.	☐	☐	☐	☐
Integrate, communicate, and cascade all the strategic planning components into an annual planning and budgeting process across and down the entire organization.	☐	☐	☐	☐
Leverage, align, and cascade the business strategy into multi-year business plans for departments and major functional areas.	☐	☐	☐	☐
Identify desired outcomes for each activity.	☐	☐	☐	☐

9. DOMAIN 4A STRATEGY EXECUTION AND TRANSFORMATION

	Not important	Somewhat importance	Important	Very Important
Facilitate development of strategy-aligned projects and annual plans	☐	☐	☐	☐
Engage with critical stakeholders, both internal and external	☐	☐	☐	☐
Help develop organization-wide strategic and transition planning activities	☐	☐	☐	☐
Assist in developing and implementing a change management program that informs and engages stakeholders.	☐	☐	☐	☐
Recommend a portfolio management system to support selection, execution and monitoring of strategy plan initiatives	☐	☐	☐	☐
Serve as the trusted advisor to project and change management teams as they implement the strategic initiatives.	☐	☐	☐	☐
Assist management in developing and executing an annual implementation and review process that drives continuous improvement.	☐	☐	☐	☐
Promote teamwork, change management, and project management skills throughout the strategy implementation effort	☐	☐	☐	☐
Anticipate changes that could impact successful execution of the strategy.	☐	☐	☐	☐

10. DOMAIN 4B GOVERNANCE AND DECISION MAKING

	Not important	Somewhat importance	Important	Very Important
Contribute to the creation of a governance plan	☐	☐	☐	☐
Validate coherence and alignment of modifications to the governance plan	☐	☐	☐	☐

11. DOMAIN 4C STRATEGIC PERFORMANCE MANAGEMENT

	Not important	Somewhat importance	Important	Very Important
Facilitate management in identifying the performance metrics and targets for strategic initiatives.	☐	☐	☐	☐
Design and report strategy performance dashboards and identify information sources.	☐	☐	☐	☐
Facilitate strategy review meetings.	☐	☐	☐	☐
Support communications to managers and employees about progress being made towards achieving the strategy.	☐	☐	☐	☐
Evaluate the KPI data and trends to determine if strategies are on track and identify improvements	☐	☐	☐	☐
Evaluate the change management effectiveness.	☐	☐	☐	☐

Strategy Planning Job Task Analysis Survey

Half way

You completed half of the survey - Thank You

What follows is to rate the knowledge areas with regard to **FREQUENCY**

Definitions - Frequency according to the following rating scales:

Frequency: The frequency of the performance tasks refers to the time the strategy planning professionals use these knowledge areas. You are asked to estimate how often you need this information in your current position.

1. Never perform 2. Sometimes perform 3. Often perform 4. Always perform

Remember: Strategy professionals work in a variety of settings and specialties. This survey depends on your individual experience relating to your current role within the strategy planning profession.

What follows are four domains with their related content areas; please rate the FREQUENCY of each knowledge area.

12. DOMAIN 1A: CULTURE OF STRATEGIC MANAGEMENT AND AGILITY

	Never perform	Sometimes perform	Often perform	Always perform
Lead tactical and project planning efforts within a business unit, ensuring alignment with the strategic plan.	☐	☐	☐	☐
Cultivate a mindset of strategic leadership, agility and ownership.	☐	☐	☐	☐
Facilitate the development of unit plans across all organizational levels.	☐	☐	☐	☐
Provide support to unit personnel throughout change cycles.	☐	☐	☐	☐
Lead processes to identify and decide upon strategic options.	☐	☐	☐	☐
Lead strategic planning reviews to foster continuous enhancement of business and departmental planning.	☐	☐	☐	☐
Design and deliver organization-wide training programs aligned with the strategic direction.	☐	☐	☐	☐
Develop a strategy evaluation and improvement process that is continuous.	☐	☐	☐	☐

13. DOMAIN 1B PLANNING TEAM EXPECTATIONS

	Never perform	Sometimes perform	Often perform	Always perform
Facilitate a corporate planning team to ensure the effective integration of planning and strategic management knowledge, timing, outcomes, processes, and infrastructures organization-wide.	☐	☐	☐	☐
Orient assembled planning team to the planning process.	☐	☐	☐	☐
Provide actionable feedback to support planning team members in maximizing their individual and team performance.	☐	☐	☐	☐
Advise leaders on strategies to engage staff and communicate the value of change to mitigate resistance.	☐	☐	☐	☐

14. DOMAIN 2A INTERNAL AND EXTERNAL ENVIRONMENTAL SCAN

	Never perform	Sometimes perform	Often perform	Always perform
Collect and share resource data to support strategy planning by organizational teams.	☐	☐	☐	☐
Support process evaluations by gathering insights and contributing recommendations.	☐	☐	☐	☐
Gather and assess data on internal and external factors to inform strategy decisions.	☐	☐	☐	☐
Collaborate with marketing function to analyze customer segments and share findings. (leveraging functions)	☐	☐	☐	☐
Assist in preparing plans to communicate environmental metrics to teams. (metrics determine by client – base org)	☐	☐	☐	☐
Research and share benchmarking data to guide strategy discussions.	☐	☐	☐	☐
Analyze and summarize customer data to support strategic follow-through.	☐	☐	☐	☐
Support change readiness assessments by providing data and suggestions.	☐	☐	☐	☐
Present data clearly to help teams apply insights effectively.	☐	☐	☐	☐

15. DOMAIN 2B STRATEGY DESIGN AND FORMULATION

	Never perform	Sometimes perform	Often perform	Always perform
Contribute to identifying core competencies and value propositions to support competitive strategy.	☐	☐	☐	☐
Collaborate with leadership to draft and refine vision and mission statements.	☐	☐	☐	☐
Assist with economic and portfolio analyses to evaluate strategic options.	☐	☐	☐	☐
Support analyses of industry trends and organizational structures to align with strategy.	☐	☐	☐	☐
Contribute to evaluating options for revenue growth and cost efficiency.	☐	☐	☐	☐
Contribute to designing feedback systems to assess strategy effectiveness.	☐	☐	☐	☐

Strategy Planning Job Task Analysis Survey

Strategy Planning Professional Domain and Content Outlines - FREQUENCY RATING

Remember: Strategy professionals work in a variety of settings and specialties. This survey depends on your individual experience relating to your current role within the strategy planning profession.

Frequency - estimate how often strategy planning professionals use these content areas

Please indicate how important each knowledge area is based on the following rating scale:

1. Never perform 2. Sometimes perform 3. Often perform 4. Always perform

16. DOMAIN 3A ALIGNMENT OF THE ORGANIZATION DESIGN WITH STRATEGY

	Never perform	Sometimes perform	Often perform	Always perform
Educate managers in the organization design/ redesign principles and their relationship to the success of strategy execution and management.	☐	☐	☐	☐
Identify organization structures affected by the proposed strategy.	☐	☐	☐	☐
Contribute to the redesign of the organization and alignment with the new strategy.	☐	☐	☐	☐
Plan and sequence changes transpired from organizational redesign.	☐	☐	☐	☐
Enable employee engagement and attunement of their hearts and minds in support of the strategic direction.	☐	☐	☐	☐
Assess the impact of organization design to corporate culture and recommend mitigation for gaps.	☐	☐	☐	☐

17. DOMAIN 3B ALIGNMENT OF OPERATIONS WITH STRATEGY

	Never perform	Sometimes perform	Often perform	Always perform
Facilitate the alignment of enterprise-wide operational plans with the organization's strategy.	☐	☐	☐	☐
Assess internal operational processes to identify actions necessary to close the gap between the current state and the desired state.	☐	☐	☐	☐
Assess what capital resources, technology or capabilities are needed to implement the strategy.	☐	☐	☐	☐
Promote the value of organizational changes that support strategy development and execution.	☐	☐	☐	☐

18. DOMAIN 3C OPERATIONAL PLANNING FOR IMPLEMENTATION

	Never perform	Sometimes perform	Often perform	Always perform
Assist the management team in developing a clear strategic change agenda, common framework, and language.	☐	☐	☐	☐
Facilitate the development of an actionable plan from the organization's strategies.	☐	☐	☐	☐
Identify specific activities and resources needed to realize the organization's strategies.	☐	☐	☐	☐
Help build and create management ownership of a viable operational plan for change.	☐	☐	☐	☐
Determine and allocate resources, finances, and timelines for each activity.	☐	☐	☐	☐
Integrate, communicate, and cascade all the strategic planning components into an annual planning and budgeting process across and down the entire organization.	☐	☐	☐	☐
Leverage, align, and cascade the business strategy into multi-year business plans for departments and major functional areas.	☐	☐	☐	☐
Identify desired outcomes for each activity.	☐	☐	☐	☐

Strategy Planning Job Task Analysis Survey

19. DOMAIN 4A STRATEGY EXECUTION AND TRANSFORMATION

	Never perform	Sometimes perform	Often perform	Always perform
Facilitate development of strategy-aligned projects and annual plans	☐	☐	☐	☐
Engage with critical stakeholders, both internal and external	☐	☐	☐	☐
Help develop organization-wide strategic and transition planning activities	☐	☐	☐	☐
Assist in developing and implementing a change management program that informs and engages stakeholders.	☐	☐	☐	☐
Recommend a portfolio management system to support selection, execution and monitoring of strategy plan initiatives	☐	☐	☐	☐
Serve as the trusted advisor to project and change management teams as they implement the strategic initiatives.	☐	☐	☐	☐
Assist management in developing and executing an annual implementation and review process that drives continuous improvement.	☐	☐	☐	☐
Promote teamwork, change management, and project management skills throughout the strategy implementation effort	☐	☐	☐	☐
Anticipate changes that could impact successful execution of the strategy.	☐	☐	☐	☐

20. DOMAIN 4B GOVERNANCE AND DECISION MAKING

	Never perform	Sometimes perform	Often perform	Always perform
Contribute to the creation of a governance plan	☐	☐	☐	☐
Validate coherence and alignment of modifications to the governance plan	☐	☐	☐	☐

21. DOMAIN 4C STRATEGIC PERFORMANCE MANAGEMENT

	Never perform	Sometimes perform	Often perform	Always perform
Facilitate management in identifying the performance metrics and targets for strategic initiatives.	☐	☐	☐	☐
Design and report strategy performance dashboards and identify information sources.	☐	☐	☐	☐
Facilitate strategy review meetings.	☐	☐	☐	☐
Support communications to managers and employees about progress being made towards achieving the strategy.	☐	☐	☐	☐
Evaluate the KPI data and trends to determine if strategies are on track and identify improvements	☐	☐	☐	☐
Evaluate the change management effectiveness.	☐	☐	☐	☐

Strategy Planning Job Task Analysis Survey

If you feel that there are knowledge areas that were not included in this survey that are important to strategy planning, please address them here so they can be reviewed and added where appropriate.

22. Are there missing domains or content areas you want to see included in this survey?

- ☐ Yes
- ☐ No
- ☐ If yes (please specify)

23. Would you like to provide additional comments?

- ☐ Yes
- ☐ No
- ☐ If yes (please specify)

Strategy Planning Job Task Analysis Survey

DEMOGRAPHICS OF RESPONDENTS

Please tell us about yourself.

24. How many years of experience do you have in the field of Strategy Planning?

- ☐ Less than 3 years
- ☐ 3 - 5 years
- ☐ 6 - 10 years
- ☐ 11 - 15 years
- ☐ 15 + years

25. Which of the following best describes your current job level?

- ☐ Executive/C-Level
- ☐ Senior Management
- ☐ Intermediate
- ☐ Entry Level
- ☐ Owner Consultant
- ☐ Other (please specify)

26. Which Region have you worked in the field of Strategy Planning (choose all that apply)?

- ☐ North America
- ☐ Central America and the Caribbean
- ☐ South America
- ☐ Europe
- ☐ Asia
- ☐ Sub-Saharan Africa
- ☐ Australia and Oceania
- ☐ Middle East, North Africa, and Greater Arabia

27. What is the highest degree or level of school you have completed?

- ☐ Associates degree
- ☐ Bachelor's degree
- ☐ Master's degree
- ☐ Doctoral degree
- ☐ Other (please specify)

28. Do you hold any personal certifications and/or certificates (check all that apply)?

- ☐ Strategy Planning Professional (SPP)
- ☐ Certified Association Executive (CAE)
- ☐ Certified Volunteer Administrator (CVA)
- ☐ Certified Change Management Professional (CCMP)
- ☐ Project Management Professional (PMP):
- ☐ PMI Agile Certified Practitioner (PMI-ACP):
- ☐ Certified in Management (CIM)
- ☐ Certified Supply Chain Professional (CSCP)
- ☐ Certified Public Accountant (CPA)
- ☐ Other certifications and/or certificates (please specify)

29. What is your age?

- ☐ Under 25
- ☐ 25-34
- ☐ 35-44
- ☐ 45-54
- ☐ 55-64
- ☐ Over 65

30. Membership in a national or regional association (check all that apply)?

- ☐ American Society of Association Executives
- ☐ International Association for Strategy Professionals
- ☐ Council for Certification in Volunteer Administration
- ☐ The International Council of Management Consulting Institutes
- ☐ Association of Change Management Professionals
- ☐ Strategic Management Society
- ☐ Other (please specify)

31. Which reference materials/regulations do you use regularly (check all that apply)?

- ☐ **Strategy In The 21st Century** by Randall Rollinson and Earl Young
- ☐ **IASP Body of Knowledge (BoK) 3.0 September 2024**
- ☐ **Is this Strategy Working?: The Essential Guide to Strategy Development, Evaluation, and Goal Achievement** by Dr Lewis Atkinson and Barbara Collins
- ☐ **The Institute Way: Simplify Strategic Planning and Management with the Balanced Scorecard** by Howard Rohm, David Wilsey, Gail Stout Perry, and Dan Montgomery
- ☐ **Exploring Strategy** by Whittington, Johnson et al
- ☐ **Strategy: Theory and Practice** Fourth Edition by Clegg et al
- ☐ Other (please specify)

32. What continuing education courses/conferences have you attended (check all that apply)

- ☐ International Association for Strategy Professionals (IASP) Annual Conference
- ☐ American Society of Association Executives (ASAE) Annual Conference
- ☐ Annual Conference for the Association for Research of Non-profit Organizations and Volunteer Action (ARNOVA)
- ☐ Association of Association Executives (AAE) - Europe
- ☐ World Business Forum
- ☐ International Conference on Business Management, Economics, and Information Systems
- ☐ Strategy World
- ☐ Annual Conference Strategic Management Society (SMS)
- ☐ Change Management Global Connect (ACMP) Annual Conference
- ☐ Other (please specify)

Strategy Planning Job Task Analysis Survey

You have completed the survey. Thank you! Your input is critical to the relevance of the strategy planning professionals. On behalf of the International Association for Strategy Professionals, thank you for taking the time to respond to this survey.

33. The International Association for Strategy Professionals will award ten content hours of governance participation. Please provide an email address to receive a participation certificate.

First, Last name

Email

34. Do you have an interest in certification development with IASP, such as participating in a focus group, developing items, program governance, etc.? Can we contact you?

☐ No

☐ Yes, Please provide name and email

Appendix D

Which of the following best describes your current job role

Was Chief Strategy Officer, now management consultant
I work in the academic world, belong to two private organizations Boards of Director and perform a intensive work in Strategic Management consulting, mainly in the Strategic Planning area from conceptualization to implementation. As a by-product of this work, normally I cooperate in the redesign of the organization structure, in order to align it with the strategy.
Although now an owner consultant, my experience also includes more than 25 years of experience at the executive/C-level and the senior management level in both the Fortune 100and Fortune 500 environments. The 15 years indicated above is in the consulting arena.
Intermittent government employee serving in several roles in a training organization.

Appendix E

Membership in a national or regional association

Canadian College of Health Leaders
American College of Healthcare Executives
Ontario Association of Registered Social Workers
Member of the IASP's Board of Directors
Canadian Institute of Management
Women in Strategy
PMI
Project Management Institute
ICAJ, APF, CIMS, CFI, ICMA

Appendix F

Other credentials/certifications

KPI
CVA
CHE - Canada
CHE - Certified Healthcare Executive
Strategy Management Professional (SMP) from IASP
facilitation/mediation
CMP
Strategy Management Professional
Chartered Manager
Advanced diploma in project management
Strategy Management Professional, PROSCI Change Management Practitioner
CAPM
Strategy Management Professional (SMP)
SMP
CSM
SMP
FCA,CMA,FMVA,FCIMS,CGBA

Appendix G

Attendance at education programs and conferences

IASP webinars
Capacity Canada BootCamp
Modern Board
attend various futurist/foresight conferences
Stratexology
COACHING AND ACCOUNTABILITY MATRIX
Many domain-specific conferences (Aerospace /Defense)
Harvard ManageMentor
Baldrige Quest Conference
ICAJ

Appendix H

Reference materials used regularly

The Profit Zone by Adrian Slywotzky, Discipline of Market Leaders by Treacy & Wiersema, Strategy Maps by Kaplan & Norton, numerous from Harvard Business Review
Emergent Approach to Strategy - Peter Compo
Thompson, Peteraf, Gamble y Strickland (2020). Strategic Management Porter, M. (1980). Competitive Strategy. New York: Free Press. Porter, M. (1985). Competitive Advantage. New York: Free Press. Kaplan and Norton (1996). The Balanced Scorecard Kaplan and Norton (2011). The Strategy Focused Organization Kaplan and Norton (2004). Strategic Maps Kaplan and Norton (2006). Alignment Kaplan and Norton (2008). The Execution Premium Niven: several books Goold, M., Campbell, A. y Alexander, A. (1993). Corporate level strategy. New York: Wiley. Grant 9th Ed - Contemporary Strategy Analysis Harvard Business Review Strategic Management Journal McKinsey Quaterly
Systems Thinking and Strategic Foresight materials
Texts/articles from Strategy Professionals such as Mintzberg
IASP BoK 2.0
Strategic Planning by Abraham
Textbooks <ul style="list-style-type: none"> • Strategy and the Business Landscape by Pankaj Ghemawat • Modern Competitive Strategy by Gordon Walker • Contemporary Strategy Analysis by Robert Grant • Strategic Management by Garth Saloner, Andrea Shepard, and Joel Podolny • Economics of Strategy by David Besanko, David Dranove, and Mark Shanley Strategy & Strategic Thinking <ul style="list-style-type: none"> • HBR Guide to Thinking Strategically • Better, Simpler Strategy by Felix Oberholzer-Gee • Good Strategy/Bad Strategy by Richard Rumelt • Execution the discipline of getting things done

Appendix I

Are there missing domains or content areas you want to see included in this survey?

Suggestion	SPP Content area
I wonder about including aspects of understanding the existing culture of an organization.	1A2 and 3A6
orientation and education of the leadership and board before planning begins to ensure readiness and understanding of strategic planning.	1B, 1B2, 3A1, 2A8
Long-Term Strategy - this is not the same as short-term strategy. The skills are different	3C5
Competitive strategies, either basic or movements. Managers must know about cost leadership, differentiation, Blue Ocean, Strategic Intent (core competencies), hypercompetition, cooptation, and some other steady and transient ways to compete and face the environment.	2B, 2B4, 2B5
Another thing that would be interesting to address is the corporate strategy, in simple terms. Managers should know (I have seen they don't) what a diversification strategy is and when is appropriate to implement it. They should know about vertical and horizontal integration, as well as, related and unrelated diversification.	3A, 3A2, 3B, 3B3, 3B4, 3C3
Strategic Foresight; I don't see anything on Strategic Foresight. I think a link to Performance Excellence would be a great add.	2B3, 4C, 4C1, 4C5
It would be very useful to add questions that identify the current role(s) of the respondent, so the answers regarding frequency can be put in context. A definition of "strategy planning" would be useful, since it's not a commonly used term and seems to have a different meaning than e.g. "strategic planning" or "strategic management"	There are 16 instances of "strategic" in the Outline
Strategy development workshops/offsites (e.g., where to compete, how to operate), board level presentations on progress toward long-term goals, and development of multi-year strategic plans	4C
Capitalizable expense planning and tracking	3B3

Appendix J

SPP Content Outline 2025

		Weight
Domain 1	ENGAGEMENT	19.5%
1A	CULTURE OF STRATEGIC MANAGEMENT AND AGILITY	12.9%
1A1	Lead tactical and project planning efforts within a business unit, ensuring alignment with the strategic plan.	
1A2	Cultivate a mindset of strategic leadership, agility and ownership.	
1A3	Facilitate the development of unit plans across all organizational levels.	
1A4	Provide support to unit personnel throughout change cycles.	
1A5	Lead processes to identify and decide upon strategic options.	
1A6	Lead strategic planning reviews to foster continuous enhancement of business and departmental planning.	
1A7	Design and deliver organization-wide training programs aligned with the strategic direction.	
1A8	Develop a strategy evaluation and improvement process that is continuous.	
1B	PLANNING TEAM EXPECTATIONS	6.6%
1B1	Facilitate a corporate planning team to ensure the effective integration of planning and strategic management knowledge, timing, outcomes, processes, and infrastructures organization-wide.	
1B2	Orient assembled planning team to the planning process.	
1B3	Provide actionable feedback to support planning team members in maximizing their individual and team performance.	
1B4	Advise leaders on strategies to engage staff and communicate the value of change to mitigate resistance.	
Domain 2	STRATEGY FORMULATION	23.7%
2A	INTERNAL AND EXTERNAL ENVIRONMENTAL SCAN	13.95%
2A1	Collect and share resource data to support strategy planning by organizational teams.	
2A2	Support process evaluations by gathering insights and contributing recommendations.	
2A3	Gather and assess data on internal and external factors to inform strategy decisions.	
2A4	Collaborate with marketing function to analyze customer segments and share findings. (leveraging functions)	
2A5	Assist in preparing plans to communicate environmental metrics to teams. (metrics determine by client – base org)	
2A6	Research and share benchmarking data to guide strategy discussions.	
2A7	Analyze and summarize customer data to support strategic follow-through.	
2A8	Support change readiness assessments by providing data and suggestions.	
2A9	Present data clearly to help teams apply insights effectively.	
2B	STRATEGY DESIGN AND FORMULATION	9.76%
2B1	Contribute to identifying core competencies and value propositions to support competitive strategy.	
2B2	Collaborate with leadership to draft and refine vision and mission statements.	

SPP Content Outline 2025

		Weight
2B3	Assist with economic and portfolio analyses to evaluate strategic options.	
2B4	Support analyses of industry trends and organizational structures to align with strategy.	
2B5	Contribute to evaluating options for revenue growth and cost efficiency.	
2B6	Contribute to designing feedback systems to assess strategy effectiveness.	
Domain 3	PREPARATION FOR STRATEGY INTEGRATION	29.2%
3A	ALIGNMENT OF THE ORGANIZATION DESIGN WITH STRATEGY	9.27%
3A1	Educate managers in the organization design/ redesign principles and their relationship to the success of strategy execution and management.	
3A2	Identify organization structures affected by the proposed strategy.	
3A3	Contribute to the redesign of the organization and alignment 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	6.53%
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	13.42%
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 build and create management ownership of a viable operational plan for change.	
3C5	Determine and allocate 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 AND EVALUATION	27.54%
4A	STRATEGY EXECUTION AND TRANSFORMATION	14.71%
4A1	Facilitate development of strategy-aligned projects and annual plans	
4A2	Engage with critical stakeholders, both internal and external	
4A3	Help develop organization wide strategic and transition planning activities	
4A4	Assist in the development and implementation of a change management program	

SPP Content Outline 2025

		Weight
	that informs and engages stakeholders.	
4A5	Recommend a portfolio management system to support selection, execution and monitoring of strategy plan initiatives	
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	Promote teamwork, change management and project management skills throughout the strategy implementation effort	
4A9	Anticipate changes that could impact successful execution of the strategy	
4B	GOVERNANCE AND DECISION MAKING	3.10%
4B1	OK: Contribute to the creation of a governance plan	
4B2	OK: Validate coherence and alignment of modifications to the governance plan	
4C	STRATEGIC PERFORMANCE MANAGEMENT	9.73%
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.	