



Certification Competencies

SPP & SMP

Exam Content Outline

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Domain 1 - Engagement,
Exam Percentage: SPP: (15-19%), SMP: (17-21%)



Domain 2 - Strategy Formulation,
Exam Percentage: SPP: (24-28%), SMP: (25-29%)



Domain 3 - Preparation for Strategy Transformation,
Exam Percentage: SPP: (27-31%), SMP: (23-27%)



Domain 4 - Strategy Execution, Governance and Evaluation,
Exam Percentage: SPP: (26-30%), SMP: (27-31%)

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

DOMAIN 1: ENGAGEMENT

ENGAGEMENT: The purpose of the group of activities that make up the ENGAGEMENT domain is to build employee commitment and remove barriers to all strategy activities. Leaders are called upon to: explain the strategy; report on initiatives that will be carried out; identify current priorities; highlight progress made; describe cascading objectives; and, reward people for their achievements. It also requires leaders to take account of feedback offered up by employees throughout the organization.

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1A CULTURE OF STRATEGY MANAGEMENT AND AGILITY

1A1	Drive tactical and project planning within a business unit in alignment with the overall strategic plan.	1A1	Coach organizational leadership working from a shared vision toward organizational performance-driven alignment and accountability to a strategic plan.
1A2	Support a culture of strategic management, agility, and accountability.	1A2	Design processes and drive a culture of strategic management and agility enterprise-wide and at all levels of the organization using a whole system approach.
1A3	Facilitate the creation of unit planning at all levels.	1A3	Provide leadership and facilitate organizational capacity-building.
1A4	Support unit personnel through cycles of change.	1A4	Establish and manage a strategic management function to guide the strategic thinking, planning, and implementation processes.
1A5	Facilitate processes to identify and agree upon strategic option	1A5	Facilitate processes that encourage innovation and identify and agree upon strategic options.
1A6	Facilitate strategic planning reviews to continuously improve the business and department planning processes.	1A6	Model and guide effective sourcing, application, and sharing of knowledge and learning enterprise-wide.
1A7	Design and deliver enterprise-wide training to support the strategic direction.	1A7	Build necessary relationships across country cultures, languages and geography with awareness and sensitivity.
1A8	Design strategy evaluation and improvement to be a continuous rather than periodic process.		

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1B PLANNING TEAM EXPECTATIONS

1B1 Assist a corporate planning team to ensure that the knowledge, timing, outcomes, processes, and infrastructures of planning and strategic management achieve organization-wide integration.

1B2 Orient assembled planning team to the planning process.

1B3 Provide actionable feedback to support planning team members so team members perform optimally individually and as a unit.

1B4 Advise leaders on how to involve and communicate the value of change to staff to minimize resistance.

1B1 Establish a top management planning team process led by the chief executive that involves key internal and external stakeholders.

1B2 Orient assembled top management planning team to planning process.

1B3 Tailor the planning process to the needs of the organization.

1B4 Support executive sponsorship efforts among senior management and key stakeholders to gain their advocacy for strategic change.

1B5 Mentor and coach executive sponsors on strategic planning and management processes.

1B6 Advise leaders on how to involve and communicate the value of change to staff to minimize resistance.

DOMAIN 2: STRATEGY FORMULATION

STRATEGY FORMULATION: The purpose of this group of activities is to devise a new strategy, or make adjustments to an existing one. This entails: analyzing the external and internal environments; formulating and analyzing several strategy alternatives; and, selecting the most appropriate.

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2A INTERNAL AND EXTERNAL ENVIRONMENTAL SCAN

2A1	Collect and disseminate information about the organization's resources to assist with the development of the strategy plan.	2A1	Organize systematic trend-spotting in sectors external to the organization and throughout the organization.
2A2	Facilitate analysis of internal processes for efficiency and effectiveness.	2A2	Gather, analyze, and interpret environmental trends.
2A3	Monitor and assess the current internal and external environments.	2A3	Monitor and assess early indicators of external trends in change drivers that could lead to disruption of the organization.
2A4	Identify relevant customer segmentation attributes in collaboration with appropriate marketing personnel.	2A4	Identify the key environmental indicators at play.
2A5	Contribute to plans for how the key environmental indicators are communicated.	2A5	Synthesize internal and external environmental data as appropriate to the context of the organization.
2A6	Provide benchmarking and best practice research.	2A6	Identify future customers/clients and the likely alignment with currently relevant products and services.
2A7	Review and analyze customer satisfaction data and intelligence regarding wants, needs, loyalty and retention.	2A7	Analyze both the current and the future environment and create a range of scenarios which are the most likely and relevant.
2A8	Assist in evaluating readiness or capacity for change and ensure recommended changes are informed by findings.	2A8	Evaluate readiness or capacity for change and ensure recommended changes are informed by findings.
2A9	Communicate data, both written and orally, to create actionable understanding.	2A9	Communicate data, both written and orally, to create actionable understanding.

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2B STRATEGY DESIGN AND FORMULATION

- 2B1** Support creation of and articulate the organization's distinctive core competencies and value proposition that result in a competitive differentiation.
- 2B2** Assist in the formulation of the vision and mission statements to be clear in defining the organization's purpose.
- 2B3** Support comprehensive economic and portfolio analysis of tentative/alternative strategic directions to ensure their viability, growth, and sustainability.
- 2B4** Assist with industry and organizational structural analysis.
- 2B5** Advise on options to grow top line revenue and lower costs to improve cash flow and increase profit margins.
- 2B6** Assist in the development of appropriate feedback loops to validate strategy options.

- 2B1** Create alternative strategic directions that create value for stakeholders and a competitive differentiation for the organization.
- 2B2** Articulate to senior management the importance of the organization's distinctive core competencies and the strategies that result in competitive differentiation.
- 2B3** Facilitate the crafting of vision and mission statements that clearly articulate the organization's purpose.
- 2B4** Assist senior management with the identification of business models that drive value for stakeholders and achieve the expected performance outcomes.
- 2B5** Facilitate leadership in the identification and selection of the organization's objectives, core strategies, and key results.
- 2B6** Anticipate changes that can impact or support the successful execution of the strategy.
- 2B7** Assess the potential impact of competitor activities, macro changes and regulatory policies on strategic direction.
- 2B8** Assess and advise on options to enhance value proposition and to improve return on investment.
- 2B9** Develop appropriate feedback loops to validate strategy options.

DOMAIN 3: PREPARATION FOR STRATEGY TRANSFORMATION

PREPARATION FOR STRATEGY TRANSFORMATION: The purpose of this group of activities is to align the operating model (i.e., how the organization functions) to the new strategy. This entails identifying, determining the scope of and executing the required transformation projects.

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3A ALIGNMENT OF THE ORGANIZATION DESIGN WITH STRATEGY

3A1	Educate middle management on organization design/ redesign principles and its relationship to the success of strategy execution and management.	3A1	Educate senior management on organization design/ redesign principles and its relationship to the success of strategy execution and management.
3A2	Identify organization structures affected by the proposed strategy.	3A2	Select the organization design framework in consultation with management and organization design professionals.
3A3	Support organization design professionals and middle management to redesign the organization and align it with the new strategy.	3A3	Design plan for implementation, including how organization structure should be modified enterprise-wide.
3A4	Plan and sequence changes transpired from organizational redesign.	3A4	Advocate for and coach senior management on change management plan for organizational design effort.
3A5	Enable employee engagement and attunement of their hearts and minds in support of the strategic direction.	3A5	Promote ethical consideration and communicate with employees on the minimum nonnegotiable behaviors through the organization code of conduct.
3A6	Assess the impact of organization design to corporate culture and recommend mitigation for gaps.	3A6	Analyze the current and required corporate cultural components and identify the core values that support or hinder the strategy execution.
		3A7	Assemble change leadership team(s) to monitor and assure movement in strategy development and execution

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3B ALIGNMENT OF OPERATIONS WITH STRATEGY

3B1	Facilitate the alignment of enterprise-wide operational plans with the organization strategy.	3B1	Assess internal organizational cross-functional capabilities to close the gap between the current and desired state.
3B2	Assess internal operational processes to identify actions necessary to close the gap between the current state and desired state.	3B2	Facilitate analysis of the organization's functional components to identify impacts of and risks to implementation of the strategic plan.
3B3	Assess what capital resources, technology or capabilities are needed to implement the strategy.	3B3	Identify and sequence the transformation projects that must be executed to improve the organization's ability to execute its strategy.
3B4	Promote the value of organizational changes that support strategy development and execution.	3B4	Create transformation plan(s).

3C OPERATIONAL PLANNING FOR IMPLEMENTATION

3C1	Assist the management team in developing a clear strategic change agenda, common framework, and language.	3C1	Facilitate the development of an implementation plan that supports the organization's strategies.
3C2	Facilitate the development of an actionable plan from the organization's strategies.	3C2	Identify specific activities and resources needed to realize the organization's strategies.
3C3	Identify specific activities and resources needed to realize the organization's strategies.	3C3	Determine and assist senior management in assigning and allocating resources, finances, timelines, and desired outcomes for each activity.
3C4	Help to build and create management ownership of a viable operational plan for change.	3C4	Foster senior management ownership of a viable operational plan for change.
3C5	Determine and recommend allocation of resources, finances and timelines for each activity.	3C5	Use specific frameworks and structures to build and evaluate the multi-year business plan and the links between the corporate strategic plan.
3C6	Integrate, communicate, and cascade all the strategic planning components into an annual planning and budgeting process across and down the entire organization.	3C6	Monitor the selection, and execution of strategic plan initiatives and projects, communicating issues and risks to senior management.
3C7	Leverage, align, and cascade the business strategy into multi-year business plans for departments and major functional areas.	3C7	Develop an enterprise-wide communication plan to disseminate information about strategy and implementation.
3C8	Identify desired outcomes for each activity.		

DOMAIN 4: STRATEGY EXECUTION, GOVERNANCE AND EVALUATION

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

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4A STRATEGY EXECUTION AND TRANSFORMATION

4A1	Facilitate the development of annual and project plans that align with the strategy.	4A1	Facilitate the development of annual and project plans that align with the strategy.
4A2	Engage with critical internal and external stakeholders in the strategy execution process.	4A2	Educate and coach senior leadership on change management.
4A3	Guide development of strategic and transition planning activities throughout the organization.	4A3	Cultivate executive sponsorship of senior management to lead and support the strategic change.
4A4	Assist in the development and implementation of a change management program that informs and engages stakeholders.	4A4	Collaborate on executive communications that facilitate a high-performance culture.
4A5	Recommend a portfolio management system to support the process by which strategic plan initiatives are selected, executed, and monitored.	4A5	Lead the strategy management function to execute the strategy implementation process.
4A6	Serve as the trusted advisor to project teams and change management teams as they implement the strategic initiatives.	4A6	Serve as the trusted advisor to senior management as the strategy is executed.
4A7	Assist management in developing and executing an annual implementation and review process that drives continuous improvement.	4A7	Facilitate development of performance-based systems that motivate and incentivize people to change.
4A8	Teach and coach teamwork, change management, and project management skills to support strategy implementation.		
4A9	Anticipate changes that can impact or support the successful execution of the strategy.		

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4B GOVERNANCE AND DECISION MAKING

- 4B1** Support creation of a governance plan.
- 4B2** Guide management to adhere to the established governing structure and decision hierarchy for modifications in their plans.

- 4B1** Identify with senior management the strategy evaluation criteria, steps, and procedures for decision-making.
- 4B2** Create a governance plan for decision-making regarding strategic plan execution.
- 4B3** Communicate the governance structure and decision hierarchy modifications in their plans.
- 4B4** Assess performance of current governance structures and decision hierarchy.

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.

- 4C1** Facilitate senior management in identifying the performance metrics and targets for strategic objectives.
- 4C2** Oversee the operation of a monitoring and accountability process to track implementation of the change.
- 4C3** Recommend corrective action based on opportunities, issues, risks and lessons learned affecting strategy implementation and execution.
- 4C4** Measure and monitor organizational health and take corrective actions.



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