Strategic Foresight: The United States Coast Guard Way

I had the opportunity to hear CDR Eric Popiel of the United States Coast Guard (USCG) discuss how the USCG uses strategic foresight to enable better long-range planning. To start off his presentation, he showed the following video, Strategic Foresight TUS4M (Teach Us Something In 4 Minutes), that describes one way of thinking about strategic foresight.

The USCG uses a four-phased approach for doing foresight:

- Immerse participants in scenarios and understand the environments opportunities and challenges.
• Identify implications for the organization and identify future needs.
• Stress-test the strategic needs across all scenarios.
• Inform decision makers.

In essence, CDR Popiel subscribes to the notion that strategic foresight is not about prediction, since that is a “fools game”, rather it is one of “comparison planning”, as outlined in the video. For the USCG, strategic foresight is a tool to plan for various potential future operating environments. For example, CDR Popiel described three potential scenarios related to the annual “Fall Haul”, that is the annual process of retrieving 735 navigational buoys from the Great Lakes before ice forms.

Each spring they replace the buoys. This past year, the USCG fleet was faced with actual and potential casualties to two of the buoy tenders; CGC MACKINAW, and CGC BRISTOL BAY. To stave off costly disorganization and operational surprises, the fleet prepared a set of scenarios to enable CGC ALDER, CGC HOLLYHOCK, CGC BRISTOL BAY, and CGC MOBILE BAY to develop multiple operational plans well in advance. The three were “walk in the park”, “fade to black”, and “apocalypse? Must be Tuesday”. CDR Popiel believes in giving specific, if not pithy, names to aid in the immersion of the participants. These scenarios encompass simple redistributions of potentially stricken units’ buoys to other cutters on basis of geography and unit capability, which is all the information unit Operations Officers need to begin their detailed plans.

In the case above, the strategic needs were the availability and capability of other cutters. Planners then performed analysis and tested a variety of redistributions to haul all buoys out of the water as soon as ice began to form on the lakes. They presented their recommendations to leadership and the operational plans were approved.

In another example, CDR Popiel discussed four scenarios for a Federal agency regarding hiring employees. In this example, the two environmental challenges were budget and the attractiveness of Federal employment as shown in the graphic below:
The expected scenario was that Federal Service was very attractive and that budgets were increasing. The “feared” alternative was that budgets were declining and Federal Service was unattractive. The other two were plausible alternatives that could play out. These four scenarios informed the agency’s planners and helped them identify the strategic needs of having a better hiring process, greater employee engagement, and a better performance management system with accountability. From additional analysis, the agency set strategic goals to meet these needs because they all needed to be met regardless of which scenarios played out.

One thing that surprised most attendees was the length of time to go through the four-phased process. CDR Popiel suggested that to do a really thorough job of creating meaningful scenarios and stress testing the needs, one year was needed. The USCG tries to go through this process every few years, each time, building on the previous iteration’s analysis. The USCG has been practicing strategic foresight for over twenty years and continually improve the process to better meet their mission. A good recommendation for all of us: continually seek better ways to plan.

Jim Stockmal  
President, ASP

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GLOBAL WEBINARS
Supercharge Strategy Execution with OKR

Date: February 13, 2018  Time: 1:00 - 2:00 PM EST
Presented by Dan Montgomery, Managing Director at Agile Strategies

FREE for ASP Members!

OKR (Objectives and Key Results) is an agile goal setting and strategy execution practice that has emerged from Silicon Valley in the past 5 years. It’s a simple, easily teachable model. Objectives are qualitative stretch goals, while Key Results are specific, measurable outcomes. OKRs are created, implemented, and evaluated every quarter, much more quickly than traditional strategic goals and metrics. Each team only commits to 1-2 objectives at a time. In a typical OKR environment, at least 60% of the goals are set by teams themselves, in what’s termed a “loose coupling” with enterprise goals. OKR is the strategy execution system that built Google, and has been credited with fueling rapid transformations at Intuit and Adobe. More recently, the practice has spread to the retail, banking, publishing and government sectors. OKR builds agility throughout the enterprise and has proven to be a faster, more adaptive and engaging way to execute strategy.

Register >

Upcoming Global Webinar

Global Webinars Presents: Next Generation Strategic Planning: Defining, Forecasting & Managing Uncertainty

Date: March 13, 2018
Time: 1:00 - 2:00 PM (EST)
Speaker: Jim McComb, Managing Director of Wild Card Strate
FREE for ASP Members!  
First 20 Nonmembers get in for FREE!

* PLEASE NOTE - this webinar will only be offered as a LIVE presentation. No recording will be available following the webinar.  *

If you would like to host a webinar, please reach out to jennie@strategyassociation.org, we would love to hear from you!

Missed a webinar? Click here to view our recorded archives.

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CHAPTER EVENTS & WEBINARS

NPCE Presents: Strategic Foresight: Navigating Uncertainty with Purpose

Date: February 5, 2018  
Time: 4:00 - 5:00 PM (EST)

[Register >]

ASP Chicago Presents: The Role of the Leader in Strategy Execution

Date: February 12, 2018  
Time: 5:30 - 7:30 PM (CST)

[Register >]

ASP Global Webinar Presents: Supercharge Strategy Execution with OKR

Date: February 13, 2018  
Time: 1:00 - 2:00 PM (EST)

[Register >]
ARTICLES FROM MEMBERS

Creating Strategy in a VUCA World
By Yvette Montero Salvatico (MBA) and Frank Spencer (MA)

The ideas that have historically guided us — hierarchical structures of society and organizations, top-down governance, segmented industries, intellectual property, personal ownership — are becoming increasingly irrelevant. We have never seen the volatility, uncertainty, complexity and ambiguity (VUCA) that we are seeing today. As innovation pioneer Peter Diamandis has noted, “The first technological steps — sharp edges, fire, the wheel — took tens of thousands of years. Now, paradigm shifts occur in only a few years’ time.” And, technology isn’t the only arena experiencing rapid change: the unprecedented shifts seen in experiential consumption, the generational workforce, globalization and many other areas are transforming the way organizations operate and evolve.

Click here to read more.

ASP'S PARTNER EVENTS

IAF North America & Caribbean Conference 2018: Ottawa, Canada
Date: May 2 - 3, 2018 - Pre-Conference Executive Program
May 4 - 5, 2018 - Conference

ANNOUNCEMENTS

Opportunity to Serve - ASP Chicago

Are you located in the Greater Chicagoland Region?
Are you looking for an opportunity to be more involved with the Association for Strategic Planning?
Would you like to increase your visibility within the Chicagoland strategy management community?

If the answers to these three questions are “yes” please let us know.

Beginning in July 2018 ASP Chicago is looking to carefully transition the leadership of the ASP Chicago Chapter to a new set of leaders (President, VP Programs, VP Membership and Marketing, and Treasurer). Much progress has been made these past few years to position and build the Chicago Chapter. Here are a few of the primary developments:

- Secured the support of Archer Daniels Midland to host our regularly scheduled panel discussions. (Thank you, Ismael Roig).
- Held a two-year series of 8 successful panel discussions on topics related to formulating, implementing and evaluating strategy. Upcoming programs:
  - 2/12 Role of the Leader in Strategy Execution
  - 4/10 Role of the Mid-Level Manager in Strategy Execution
- Built a strong and growing partnership with PMI Chicagoland.
- Established a formal relationship with the Midwest Chapter of the Association for Strategic Alliance Professionals.
- In process of developing collaborative relationships with the Chicagoland chapters of ATD and SHRM.
- Hosting the ASP 2018 Conference in May 2018 – Bridging the Strategy Execution Gap.

Thank you in advance for considering this opportunity. If you are interested in exploring this opportunity to serve, please reach out to Randall Rollinson, President, ASP Chicago at rrollinson@lblstrategies.com or 773-758-6921.

ASP Nonprofit Center for Excellence First Mondays Series Presents: Launching and Guiding Strategic Transformation: A Case Study
Date & Time: March 5, 2018, 4:00 - 5:00 PM (EST)
Facilitated by: Blair Dimock, VP
Partnerships and Knowledge, Ontario Trillium Foundation

The field of philanthropy has been challenged in recent years to become more transparent and accountable to its stakeholders, and to demonstrate more effectively the ultimate impact of the investments being made to address society’s most pressing problems. There has been much discussion of the need for a more evidence-based, outcomes-oriented approach to achieving impact, but overall a lack of visible progress in getting there.

In this session, Blair Dimock will provide a first-hand account of the story of transformational change at one of Canada’s largest grantmaking foundations, the Ontario Trillium Foundation (OTF). With annual investments of over $135 million in community-based initiatives across Ontario, OTF plays a leading role in supporting the development and evolution of the nonprofit sector in Canada’s largest province (population 11 million).

Beginning with a strategy review launched in 2013-14, OTF has reinvented itself from being a reactive to a proactive funder, introducing an outcomes-based model grounded in a data-driven approach to every aspect of its work. OTF’s decision to transform what it funds and how it funds was a direct response to the disruptions in the environment facing the nonprofit sector in Ontario, from the slow growth economy and government austerity to demographic change and the increasingly complex nature of the social and environmental challenges facing communities today.

Join Blair for a mini case study of the OTF experience across four key dimensions of the transformation process:

- Strategic Clarity – the “what we do” of an evidence-based approach.
- Simple and Fair Processes – the “how we do it” of an evidence-based approach.
- Open, Transparent Accountability – the “so what” of an evidence-based approach.
- Commitment to a Learning Culture – the “who we are” of an evidence-based approach.

Join Blair and other participants in a dialogue about the challenges and opportunities of adopting an evidence-based approach for your organization. The session will include practical tips and tools on how to approach a strategic transformation, and a glimpse at the early results of OTF’s new investment model.
Participation in First Mondays is free but registration is required to participate. We anticipate a large crowd for this discussion so we encourage you to reserve your seat quickly. Registrants will receive an email with connection information on the day of the discussion.

Strategy Magazine - Call for Article Submissions

The ASP Thought Leadership Committee is looking for contributors to an upcoming issue of Strategy Magazine, currently a publication of the Strategic Planning Society (SPS). We are looking for well researched, insightful, globally applicable articles for publication. Content should be oriented towards Strategy and Strategic Planning (Lead, Think, and Plan aspects of the ASP BOK). Editorial policy and submission guidelines follow.

Strategy Magazine is dedicated to helping executives and strategy professionals improve their strategy formulation and strategic planning. The magazine includes a stimulating and informative mix of articles and case studies exploring strategy in practice.

The magazine is circulated to senior strategists globally from across all industry sectors, including members of the Association for Strategic Planning (ASP) and the Strategic Planning Society (SPS) and other subscribers. Articles may also be highlighted in ASP newsletters. This is a unique opportunity for authors to share their experience with an unparalleled audience of strategy professionals and strategic decision makers.

Editorial policy and guidelines

We actively encourage members and non-members to submit articles for consideration. All submissions are peer-reviewed by an editorial review board consisting of SPS Fellows and against the objectives of the magazine and the following criteria:

Practical implications
Articles should focus on strategy development and strategic planning – in practice. You should be explicit about how your ideas can be applied in organisations.

Objectivity

You should demonstrate your expertise to readers through objective analysis and commentary. It is editorial policy that authors do not mention their company name, services or products within articles – however, full credit is given to authors and contact details are provided after each article.

Authority

Wherever possible you should provide research evidence, case examples, quotes from practitioners and hard numbers to back-up your argument; readers are rarely interested in unsubstantiated opinions. Appropriate attribution and references should be included and carefully considered.

Clarity and brevity

Be clear and explicit about your key messages: do not expect readers to ‘read between the lines’. Use headings and bullet lists to emphasise main points. Length is not the same as depth; if you can express an idea in 500 words rather than 1,000, you will be providing more value to busy readers.

Submitting an article

To have your article considered, please send a draft, or a synopsis of your proposed article explaining the following:

- What is the idea or concept? Is the idea new or a counter argument for an existing idea?
- Who is the article aimed at?
- Why is this an important issue for target readers? How will they benefit from this article? What impact will your idea have on organisations? Is it a breakthrough? How can it be applied?
- What research have you carried out? What professional experience do you have to qualify it?
- What key messages should readers understand?

Articles are generally around 2,000 words. Submission deadline is March 2, 2018.

Please supply your text in MS Word. Illustrations may be supplied in whatever format enables you to communicate your ideas most effectively to our designers (a rough sketch is fine).
To submit an article, or for more information, please contact Chris Hafner at c.hafner@traversantstrategy.com.

ASP Member Spotlight

We want to let ASP members know who you are! To be featured in our member spotlight in a future issue, on the ASP website and LinkedIn. To be considered, please answer any three questions from the following list, provide a photo of yourself (head shot), and be sure to include your name, title and organization.

- What is your biggest achievement to date – personal or professional?
- What are your biggest professional challenges?
- What do you value most about ASP?
- What are you proudest of?
- How can other ASP members help you?
- How can you help other ASP members?
- What book would you recommend for other ASP members to read?
- What do you like most about your current role?
- What are your career aspirations?
- What are three words that describe you?
- What do you do?
- If you are not at work, you are...?

Please email your answers, photo and information to membership@strategyassociation.org.

ASP Nonprofit Center Launches Update to National Research on Nonprofit Planning

ASP’s Nonprofit Center for Excellence is partnering with Dr. Margaret Reid, Department of Political Science, University of Arkansas, and Dr. Crystal Evans, College of Business and Economics, Regis University, Denver, to conduct a follow up to its 2012 landmark national research on strategic planning practices in the nonprofit sector. Click here to access the 2012 survey results report.

According to Denise McNerney, chair of the ASP Nonprofit Center for Excellence, the 2018 research will analyze responses to a comprehensive survey intended to further refine our understanding of successful planning practices. The
researchers will use this data to pinpoint correlations between those practices and the overall capacity and success of an organization in fulfilling its mission. “The original survey asked respondents to self-rate organizational success. This new version will use a validated tool to examine the organization’s capacity to successfully design and implement strategic practices, and this data will be used as our ‘level of success’ differentiator.”

McNerney indicated the link to the survey will go live in the near future. ASP and the Nonprofit Center for Excellence will be sending emails and news updates with the survey link embedded in the coming weeks. As an incentive to participate, everyone who completes the survey will be able to request a copy of the research results, which will include the overall capacity rating for their own organization.

**ASP Wants to Hear from You!**

Want to get published in the Strategic Edge newsletter? If so, we would love to hear from you! ASP members are encouraged to submit strategy-related news, articles and content for publishing. If you have any content to share for our next issue, please email it to Jennie at jennie@strategyassociation.org.

Next submission deadline is Thursday, February 22.

**Members At Work**

It is always interesting to hear from members and their activities. Let us know what moves you are making, articles you are writing, and presentations you are giving in the area of strategy and strategic planning.

To send us an update for "Members at Work", please contact membership@strategyassociation.org.

**CERTIFICATION CORNER**
Why Should You Submit an Application for the ASP Certification Program?

- Are you working in strategy planning, execution, or change management?
- Do you have confidence that your knowledge and competence is up-to-date?
- Would you like a credential that testifies to your expertise and competence in this critically important discipline?

Submit your application today by visiting our website here or contacting certification@strategyassociation.org.

What is the Process for Applying?

ASP has a two-part application process that includes review of Applicant's ASP Qualifying Application followed by processing of the PTC Test Center Application. It is strongly recommended that Applicants submit their completed Qualifying Application at least TWO TO FOUR WEEKS IN ADVANCE OF THE DEADLINE to assure sufficient time to revise any additional information is needed. The four key components are:

- Qualifying Application Form: a writable/savable pdf application form (downloadable here).
- Case Study: Up to 1,000 words or two standard pages, following a set format outlined in the application.
- Professional References: Three (3) references for SMP and two (2) for SPP. At least one must speak to Applicant's ethics.
- Career Bio: Current professional resume, career bio, curriculum vitae or other description of professional education and experience, especially that related to strategy work.

The next cycle and important deadlines are coming up! Submit your qualifying application today!

Qualifying Certification Application Deadline(s):
Friday, February 2, 2018 Applicants outside of the US and Canada
Friday, February 23, 2018 Applicants in US and Canada

Testing Center Application Deadline(s):
Friday, March 2, 2018 Candidates testing outside of the US or Canada
MEMBERSHIP CORNER

Welcome to new members who joined in January 2018!

Boston Chapter

- Tim Gillis, MathWorks

Chicago Chapter

- Stephen Lenz, Perkins+Will
- Joseph Nobile

Members at Large

- David Kamenir, Novo Nordisk, Inc.
- Adam Burritt, American Red Cross
- Sami Aldejwi, The Center for Studies and Media Affairs
- Dwayne Hawkins, DAH Consulting
- Guerdy Regilus, Regent University
- Hallie Kammeyer, Mutual of Omaha
- Dianna Renz, Western Wyoming Community College
- Cynthia Greenberg, NASCO
- Kevin Cooper, University of North Dakota
- Candice Williams, Development Bank of Jamaica
- Perna Pierre
- Ventaraman Ayyer
- Danielle Figura, Sturgeon County
- Louy Theeuwen, Great River Energy

National Capital Area Chapter

- Richard Goodall, Engility LLC
- Camron Doss, Office of the Comptroller of the Currency
- Ben Bloschock

Northern California Chapter

- LeeAnne Giblin, KeyPoint Credit Union