The Strategic Edge

ASP’s monthly update on strategy news, tools, resources and upcoming events

November 2017

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THE PRESIDENTIAL PERSPECTIVE

Stumbling and Fumbling with Purpose
I recently saw a post on LinkedIn referencing what I thought was a new perspective on strategic planning. Digging deeper, the article was originally posted in 2013. At least I felt better about keeping up with my professional reading! The original article was a slight twist on a well-known consulting firm’s approach to strategy within the context of addressing a social challenge: setting a vision of how a social entrepreneur will make a difference in the future, deciding on which part of the problem to focus, determining activities, a business model and measures of success, and finally what capabilities (knowledge and skills) the firm will need. The overall approach suggested that a more emergent or adaptive strategic planning approach works better than a classical more static one. The authors argued that the dynamics of today (2013) demanded a different approach. Instead of predicting the future by past data, do more experiments and learn from them. Instead of crunching numbers through data analysis, look for patterns using emerging pattern recognition techniques. We were encouraged to look for the “patterns in the stream of decisions”. Instead of leading the execution of the strategy from the top, execute by the “whole” of the organization. I have written on ways to do this in *The Strategic Edge* in 2013.

After reading the article and much of the commentary to the LinkedIn post, I dug out the old 1994 classic by Henry Mintzberg, “The Fall and Rise of Strategic Planning” (Harvard Business Review, Winter 1994). What a great read. In the article, Mintzberg contrasts “deliberate planning” versus what he first termed as “emergent planning”. He highlights three fallacies of strategic planning. The fallacy of prediction – that is the impossibility of predicting discontinuities or in today’s parlance du jour, disruptions. The fallacy of detachment – the importance of connecting with what is actually taking place within and across the organization. He suggests that planners and leaders need to pay heed to all the “soft scraps of information” including gossip and hearsay. He further emphasizes that “hard data may inform the intellect, it is largely soft data that generates wisdom.” Real planners, he suggests, “gets their hands dirty digging for ideas, and real strategies are
built from the nuggets they uncover.” The fallacy of formalization – implies that there is “a rational sequence, from analysis through administrative procedure to eventual action.”

Mintzberg suggests that learning can happen in the opposite direction as well. “We think in order to act, to be sure, but we also act in order to think”, he writes. The importance of trying things in order to develop better, emergent strategies. Strategic planning must be a learning process. Mintzberg goes on to reframe planning as programming – that is the codification, elaboration, and conversion of strategies. Codification in Mintzberg’s mind means clarifying and expressing strategy sufficiently to support formal operationalization. Perhaps one of the gaps that will be explored during ASP’s upcoming conference in Chicago May 10 – 11, 2018.

To me this means getting everyone on board through communication and engagement, just as suggested by the authors of the article – “execute by the whole”. Elaboration to Mintzberg means breaking down the strategy in to “substrategies, and ad hoc programs as well as overall action plans…” to specifically articulate “…what must be done to realize each strategy.” Conversion refers to the effects of the changes on the organization, which also must be articulated in terms of budgets, performance controls and the like. In this context, Mintzberg’s programming of strategy is important to coordinate resources and get everyone pulling in the same direction.

Re-reading this portion of the article reminded me of the intent behind Robert McNamara’s “planning, programming, budgeting, and execution” or PPBE process his "whiz kids" implemented across the US Department of Defense in the late 1960s and 1970s and is still used today. But in order for this programmed strategy to be successful, Mintzberg also argues for adaptability. In order to promote emergence and adaptability, strategies must be broad he suggests, “a big picture is painted with little strokes.” It is a balancing act for sure, as he tells us that “management is above all a practice where art, science and craft” must come together.

So, to me the lesson is that we could stumble and fumble – that is experiment and learn – only if driven by purpose and vision that touches the hearts and minds of everyone in the organization. The other re-learning for me is that what might be seen as a new discovery in 2017 about an approach written about four years earlier is really grounded in a seminal work nearly a quarter of a century old. A testament to Mintzberg’s legacy.

ASP’s strategy has elements of both deliberate planning and emergent planning. Yes, we do have long term goals to serve you, our members, and yes, we do have a set of
strategic objectives and prioritized initiatives (check out our strategy map [HERE](https://example.com)). But we also purposefully want to try new things. We want to experiment and learn. And we have put investment dollars in our budget to enable such learning. As Mintzberg said, "strategies grow initially like weeds in a garden, they are not cultivated like tomatoes in a hot house." My role, and ASP's Board’s role is to cultivate ideas so we can learn and grow. We know we won’t get everything right, but with proper controls and dedicated volunteers, we won’t stumble and fumble so often. Contact me if you would like to help and get engaged. Peace.

Jim Stockmal
President, ASP

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**ASP'S 2018 ANNUAL CONFERENCE**

![2018 ASP Annual Conference Banner](https://example.com/banner.png)

**2018 ASP Annual Conference**

**Bridging the Strategic Execution Gap**

**Rosemont, Chicago**

**Pre Conference May 8**

**Conference May 10-11**
ASP is delighted to announce Ismael Roig and Dan Totecki as two of our keynotes!

Learn more at [www.strategyassociation.org/page/2018Conference](http://www.strategyassociation.org/page/2018Conference)

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**GLOBAL WEBINARS**

**Executing Your Strategy at the Speed of Change**
Now FREE for all ASP Members!

**Date:** November 14, 2017  **Time:** 1:00 - 2:00 PM EST  
**Price:** FREE for ASP Members; $40 for Non-members  
Presented by Mark Morgan, StratEx Advisors

The idea that a company can annually refresh how they remain relevant and prosperous in their field is simply obsolete. What is needed is an approach that deals with the three realities we face today: **Change**, **Culture** and **Capacity**:

- **Change** because the rate of change is accelerating such that monolithic approaches to strategy development and execution are too slow and too rigid.
• **Culture** because if anything is a constant it is the question of how to deal with organizational inertia.
• **Capacity** because frankly companies often lack the time to deal with their operational reality let alone focus on something that is longer in range.

This webinar describes these three issues and offers concrete alternatives to dealing with all three. Examples will be given on how organizations typically struggle with these issues along with examples of how they can be overcome given the right approach.

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.](#)
NorCal Presents: Tapping Collective Intelligence for Strategic Solutions and Superior Results

Date: November 6, 2017
Time: 5:30 - 8:00 PM (PST)

ASP Chicago Presents: A Sample of Best Practices in Strategy Formulation

Date: November 13, 2017
Time: 5:30 PM - 8:30 PM (CST)

Executing Your Strategy at the Speed of Change

Date: November 14, 2017
Time: 1:00 - 2:00 PM (EST)

ASP NorCal Presents: 2nd Annual Non-Profit Challenge
Date: December 2, 2017  
Time: 11:00 AM - 6:30 PM (EST)

Click here for additional information about upcoming events in your area!

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ANNOUNCEMENTS

ASP Nonprofit Center for Excellence First Mondays Series
Facilitating the People-Side: No More “Meetings-From-Hell”

Facilitated by: Sheridan Barker, Global Managing Partner, Haines Center for Strategic Management

Another “Meeting-From-Hell”? Have you ever been a participant in, or heaven forbid, the facilitator in charge of a strategic planning meeting that “went south”? If you have ever worked on a team, committee or board, you have probably experienced a meeting where chaos reigned, where a bully took over, or where everyone checked out before their bodies arrived in the room.

Effective strategic planning meetings require intentional preparation of processes and structures, aka a clear agenda, defined outcomes, and strategies to gather input, process multiple perspectives, and make decisions. However, many leaders forget to prepare for the people-side of the meeting—a fatal error. People make up meetings—people with conflicting agendas, people with intent to sabotage the outcome, people who hate the “process” of effective problem solving, or people who are “just plain” bullies. The final First
Mondays discussion of 2017 will focus on the art and science of meeting facilitation to ensure productive outcomes. Our discussion will cover the following questions:

1. How does the physical set-up of the room impact people in the meeting?
2. What are the roles and responsibility of the facilitator?
3. What are the roles and responsibilities of participants in an effective meeting?
4. What processes do facilitators use to ensure “good behavior” during a meeting?
5. What strategies do effective facilitators use to handle difficult people in a meeting?
   o the bully
   o the negative objector
   o the warm body
   o the bird-walker
   o the side talker
   o the wind-bag
   o others?
6. How do effective groups handle decision-making?

The discussion will be moderated by Sheridan Barker, Ed.D. Sheri is Global Partner and co-owner of the Haines Centre for Strategic Management and an ASP-Certified Strategic Management Professional. She specializes in strategic planning and implementation, leadership development and building collaborative cultures that enhance organizational effectiveness, thereby producing superior results.

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.

First Mondays 2018

The first Monday in January falls on January 1, so we will resume our discussions in February. The topic will be strategic foresight, how to identify and prepare for potential threats and capitalize on hidden opportunities. A fittingly forward-looking topic for the start of the New Year!
2nd Annual Nonprofit Challenge in San Jose

A Local Organization with a Project +
YOUR Expertise = FUN Volunteering Day
Join us to receive or share strategy expertise!!

ASP NorCal and SVODN are excited to jointly bring a one-day, hands-on, interactive and collaborative event, the 2nd annual Nonprofit Challenge, that brings together strategists and creative thinkers from diverse fields and local community organizations that need help with strategic projects ranging from fundraising campaign design to development of a 5-year strategic growth plan.

Are you a part of a Bay Area nonprofit organization that can benefit from free strategic advice?

If you are interested in receiving free consulting for your project, submit an application, including background information and a general outline of the project for which you seek support by emailing the completed RFP to Martina at mdoleshai@gmail.com.

Non-profit applications are due on Friday, November 10th by 5:00 PM (PST). Organizations selected to participate in the December 2nd session will be notified by November 17th.

Do you want to share your strategic expertise to create value for a local community organization?

We invite you for a fun day of learning, networking, and best of all, using your knowledge and expertise to help community organizations become more effective and successful.
Register as a volunteer strategist by **Monday, November 27th** HERE

If you are not in the San Francisco Bay Area, please forward to your friends and colleagues in your local area.

**Register >**

### 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 Friday, November 24.

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

Who Should Consider ASP Certification?

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

Spring 2018

Period 18-1: Exam Dates: May 5 through May 19, 2018

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
Friday, March 23, 2018 Candidates testing in US and Canada

Want to Learn More?

There are three ways to explore:

- Visit www.strategyassociation.org and select Certification from the menu;
- Email your questions to certification@strategyassociation.org, or call 1.844.345.2828 ext 235.

MEMBERSHIP CORNER

Welcome to new members who joined in October 2017!

Atlanta Chapter
- Michael Latham, AAA

Austin-San Antonio Chapter
• Buffy Burnett

**Boston Chapter**

• Chelsea Flynn, ESL Federal Credit Union

**Chicago Chapter**

• David Sanchez
• Marianne Jones, Pearson
• Owen McGovern, IdeaMash

**Members at Large**

• Jennifer Hein, Clemson University
• David Worsley, WSP
• Jesulito Cornejo, The Gideons Inc
• Richard Griffith
• Tom Kiedrowski, Cedar Tree Advisory
• Liv Medina, Citipower
• Charles Baden-Fuller, Cass Business School

**National Capital Area Chapter**

• Gregory Waldrip, MITRE Corporation

**Nigeria Chapter**

• Okechukwu Ndeche, Independent National Electoral Commission

**Northern California Chapter**

• Catrin Roberts
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