The Strategic Edge

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

October 2017

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THE PRESIDENTIAL PERSPECTIVE

End of Summer Musings, BBQs and Reflections

Last month, Dr. Amy Zalman, presented her approach to accelerate organizational change – Strategic Narratives. I took copious notes on her excellent case studies and how she addressed each presenting problem. The tool she described in the first case study was a practical way to uncover the strategic narratives going on in the organization. I am going to add this stakeholder analysis matrix in my “kit bag.” It enables the narrative to unfold because of its inclusivity – all internal and external stakeholders have a say in the narrative. Vendors, customers, employees, managers, etc. The approach worked for this government agency because it helped develop a mutually understanding of the past. They took time to uncover that shared understanding. They slowed down so they could move forward more quickly.

The case reminded of Marvin Weisbord’s Future Search approach which heavily influenced me early in my career transforming organizations. Marvin was not trained in organizational development theory, rather, as a manufacturer he created an approach to save his company. In a future search workshop or event, you first get participants engaged in describing the organization five or ten years ago. When I use this approach, I try to get the participants drawing on large sheets of white paper posted around the room – trying to draw out their creativity in a different way. Then everyone tells their story about the past, what they liked and didn’t like, what was important to them? What gave them meaning? The next step in a future search is then to develop an understanding of the present? What is different? What is the same? What are the issues at hand from everyone in the room?

As Ed Schein, a giant in the organizational analysis field, says the “strategic narrative” may have many layers, like culture. Ed Schein describes culture as the intersection and overlap of three components: the observable facts, the espoused values, and the underlying assumptions. In this model, Dr. Zalman’s strategic narratives fall within the observable facts realm. Ed Schein’s model supports Dr. Zalman’s assertion that strategic narratives have many layers as he talks about the many layers of culture. The macro layer from an overall environmental (e.g., country-based) perspective. The occupational layer – for example, engineers have a different culture that a chemist working in the pharmaceutical industry according to Schein. Micro cultures are also at play, especially for large organizations.

The last step in the future search process is to develop a shared picture of what the organization should look like in five or ten years into the future. If stuck in the process of agreeing on that shared future state, the approach Dr. Zalman’s described while discussing the third case study involving a Federal defense contractor to use scenario planning and role playing could unclog the thinking and lead to a shared vision. She could have also used the “stops, keeps and starts” approach to help this contractor decide what must continue to be useful and not useful. Based on this shared desired narrative, the future search team builds out a strategy and action plan to move toward the future they have just collectively defined. In Future Search, Weisbord describes the value of slowing down before embarking on a strategic change. All too often we forget the importance of taking a pause to reflect.

Once a month, ASP gives you the opportunity to slow down for one-hour with our Global Webinar series. If you missed Dr. Zalman’s presentation it is available at the ASP store here. The next opportunity to slow down is on October 11th when the Richard Goodman Award winner, Dr. Monica R. Allen will do a special presentation on how Mecklenberg County is strategically planning for growth while staying within fiscal constraints. Their story is
worth hearing and learning from. I encourage all of you to take time out to slow down to move faster with your strategic changes.

Jim Stockmal
President, ASP

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**ASP'S 2018 ANNUAL CONFERENCE**

**2018 ASP ANNUAL CONFERENCE**
**BRIDGING THE STRATEGIC EXECUTION GAP**

**ROSEMONT, CHICAGO**

**PRE CONFERENCE MAY 9**
**CONFERENCE MAY 10-11**

**NOW ACCEPTING SUBMISSIONS**

**CALL FOR PRESENTERS**

CLICK TO SUBMIT

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**2018 ASP Annual Conference | Call for Presenters**

The 2018 Annual Conference program committee is seeking dynamic speakers for 3 or 6 hour pre conference masterclass workshops (Wednesday, May 9, 2018) and 75 minute conference breakout sessions (Thursday, May 10 and Friday, May 11, 2018).

**Bridging the Strategic Execution Gap**

Across sectors of our disrupted economy, there is growing awareness that, as key leaders formulate strategy for their organizations, a gap in understanding, performance, and execution often occurs for those charged with implementing the initiatives, flowing from the strategy. This gap invariably translates into unwanted costs, lost opportunities and the failure to execute.

The 2018 Conference is an opportunity to invite professional colleagues from related disciplines to join with us to establish a better understanding of the strategy execution gap. From this shared understanding, we are looking for new insights, tools and techniques that will help each profession bridge their vector of the gap.

Submission deadline: Friday, October 13 at 5 PM ET

CLICK TO SUBMIT

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**GLOBAL WEBINARS**
Global Webinars Presents Richard Goodman Award Winner - Dr. Monica R. Allen

**Date:** October 11, 2017  **Time:** 2:00 - 3:00 PM ET  
Presented by Dr. Monica R. Allen, Mecklenburg County

For many local governments, strategic plans are rare. However, over the last decade government officials have realized the importance of strategic planning and have begun implementing both enterprise and departmental strategic plans. This webinar will highlight the recent efforts by Mecklenburg County to develop a robust strategic business planning framework that considers external and internal drivers for change or sustainability. Additionally, attendees will learn how the County maximized its strategic business planning efforts by aligning the FY2017 and FY2018 budget decisions to strategic business plan goals, objectives, strategies and actions. Resource allocation focused on identifying the appropriate costs for human capital, information technology, communications, assets/facilities, and other associated costs for more than 22 different lines of business. FY2017 initial results reveal that investments made in the strategic business plans have helped achieve many of the year-one goals and/or objectives for the County.

Register >

Upcoming Global Webinar

**Executing Your Strategy at the Speed of Change**

**Date:** November 14, 2017  **Time:** 1:00 - 2:00 PM (ET)  
**Speaker:** Mark Morgan, StratEx Advisors

FREE for ASP Members!

Click here for more details.

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.

### CHAPTER EVENTS & WEBINARS

**ASP Nonprofit Center for Excellence First Mondays Series - DRIVER. PLEASE!**

**Date:** October 2, 2017  **Time:** 4:00 - 5:00 PM (ET)

Register >

**ASP LA Presents Future Proofing YOUR Workplace: Case Studies in Transformative Future Thinking**

**Date:** October 10, 2017  **Time:** 5:30 - 7:30 PM (PT)

Register >

**Global Webinars Presents Richard Goodman Award Winner - Dr. Monica R. Allen**

**Date:** October 11, 2017  **Time:** 2:00 - 3:00 PM ET

Register >
NPCE: Tapping Group Wisdom and Stimulating Imagination for Proactive Planning  
**Date:** November 6, 2017  
**Time:** 4:00 - 5:00 PM (ET)

[Register >]

ASP Chicago Presents A Sample of Best Practices in Strategy Formulation  
**Date:** November 13, 2017  
**Time:** 5:30 - 7:30 PM (CST)

[Register >]

Executing Your Strategy at the Speed of Change  
**Date:** November 14, 2017  
**Time:** 1:00 - 2:00 PM (ET)

[Register >]

Click here for additional information about upcoming events in your area

**ARTICLES FROM MEMBERS**

In Search of Strategy ...  
By Virgilio Paredes Machado, MBA

Recently, professor Mario Hector Vogel from Argentina conducted a survey with more than 13 thousand professionals to whom he asked: Does anyone know what it is a Strategy? and only 14% responded correctly, an experience similar to that of many strategists around the world.

It is known that Sun Tzu, the Chinese general strategist, manager of the modern concept of strategy, who lived 2400 years ago, was an expert in the art of war and that great military copied his teachings, being successfully adapted to the present century of business organizations where he states that discipline was fundamental to a victorious war.

Click here to read more.

Conflict Management in Development Projects  
By Alejandro Paredea Trapero, PhD, PMP, SPP, PMD Pro I

PM Culture, initiating a project culture was the First International Project Management Congress coordinated by the PMI Honduras Chapter, which was held in early September with five international speakers and more than 90 delegates.

Participants had the opportunity to learn from workshops, conferences and then analyzed through a forum on how to implement and manage social projects in difficult environments. It is not easy to manage projects, much less social development projects. According to PM4NGOs (Project Management for NGOs), it highlights the complexity of implementing social development projects. In its book, A Guide to the PMD Pro - Project Management for Development Professionals, it mentions some challenging and unique features like delivering tangible and intangible products; results related to the behavioral change of people; aimed at solving complex problems such as poverty, inequity and injustice; implementation in difficult environments with scarce resources; complicated management of stakeholders and strategic relationships and with assertiveness in the process as important as the final result.

Click here to read more.

**ANNOUNCEMENTS**

ASP Nonprofit Center for Excellence First Mondays Series  
**Date & Time:** November 6, 2017, 4:00-5:00 PM (EST)  
**Discussion Topic:** Strategic Planning Facilitation Skills: Tapping Group Wisdom and Stimulating Imagination for Proactive Planning  
**Facilitated by:** Loren Tarentino, President, Loren Tarentino Consulting, Inc., and Global Partner with the Haines Center for Strategic Management

Well, that was a royal waste of time! How many times have you left a meeting and either thought this yourself or heard another say it aloud? Meetings ARE a waste of time . . . IF they are not effectively guided through a series of important processes that ensure group input is focused and balanced. Unfortunately, facilitation skills are seldom taught intentionally, seldom studied and implemented with finesse, and usually ignored as a field of study for strategic planning and change. Yet, it is one of the most important and powerful tools leaders can use to lead
and manage strategy in a disruptive world. In November, the First Mondays discussion will explore facilitation techniques considering the following questions:

How can a leader guide critical strategic planning work with a team in situations when:

- a single voice dominates the conversation,
- hostility overtakes content,
- the focus becomes blurred, or
- there is no cohesive structure and process to ensure success.

The discussion will be moderated by Loren Tarentino, an ASP Certified Management Professional with more than three decades of experience. Loren is a coach, master facilitator, and project management expert who specializes in strategic leadership consulting.

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.

In December, First Mondays will return to the topic of facilitation skills with a discussion moderated by Sheridan Barker, who is also a Global Partner with the Haines Center for Strategic Management. Watch for details in the next issue of the Strategic Edge.

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 Wednesday, October 25.

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

What is the Process for Certification Success?

1. Decide which credential is right for you and assess whether you meet the eligibility requirements for your chosen credential by downloading and reviewing the application here.
2. If you do not meet the eligibility requirements, develop a plan of activity that will get you to eligibility. You may need to teach your chapter colleagues, publish an article, attend a strategy conference, register for a course of study. Applicants for both the SMP and SPP credentials need to describe a strategy case study that you led. You may need to plan to do a case that will fit the requirement.
3. If you believe you have met all of the eligibility requirements for your chosen credential, complete and submit your application for review before the deadline of your desired testing date. Deadlines are posted on the ASP website here!
4. Your application will be reviewed by at least two reviewers who must agree that you are eligible for your chosen credential. If you need more work experience or education, the reviewers may recommend an alternative path for you.
5. While you are waiting for your application to be approved, you will want to develop your study path. Download and review the BOK 2.0. Decide if you will register for an online or face to face course with one of ASP’s Registered Education Providers (REPs), or if you will form an informal study group with other colleagues in your company or your chapter.
6. Register for a specific date during the two week examination cycle with the official test center in your area. Show up on the scheduled date and take the 160 question multiple choice exam. It will take a few weeks to get your results.
7. Pass the exam, receive and display your certificate of achievement, send a press release to your local media, and enjoy the moment!
MEMBERSHIP CORNER

Welcome to new members who joined in September 2017!

Chicago Chapter

- Christopher Rzany, Fidelity Life Association
- David Jaimovich, Quality Resources National

Members at Large

- Huddersfield Business School (95 Student Members)
- University College Dublin (51 Student Members)
- Anca Babor, British Medical Journal
- Christian Lund, CCGT | SPS | Infosys BPO
- Paul Galante, Concerto Europe
- Joe LaFollette, Dominion Energy
- Ken Sturt, NSPCC
- Roxanne Chartrand, Ontario Teachers Insurance Plan
- Ricardo Mejia, SALLEIJUNTAS
- Anthony Day, Sustainable Futures Report
- Mike Abrey-Bugg
- Colin Tuckwell
- Chris Renwick

National Capital Area Chapter

- Niemat Ahmadi, Darfur Women Action Group
- John Stanley, Federal Highway Administration

Northern California Chapter

- Frances Foster