The Strategic Edge

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

April 2018

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THE PRESIDENTIAL PERSPECTIVE

“…the best laid plans of mice and men, often go awry”

Or in the tongue of Robert Burns: “The best laid schemes o' mice an' men / Gang aft a-gley.” We have often heard this phrase from Burns’ poem, “To a Mouse,” in much of our strategic planning training or on the job. It is similar in intent to Eisenhower’s “a plan is nothing…planning is everything” to invoke the need for real focus on closing the strategy execution gap.

The more I look at the Conference Agenda details, the more excited I get about what will clearly be a very informative and worthwhile event in Chicago May 9 – 11, 2018. I trust you have all purchased your registration before the Early Bird pricing ends on April 9. From scanning the descriptions of the sessions, I see that risk management comes up in at least two presentations. You will hear, for example, from Kim Nesbitt from Mitre on “how to bring risk management into strategic management” on Thursday. On Friday afternoon (no early flights home please!) you will hear from several speakers on the challenge of managing risks in order to close the execution gap. It will be interesting to hear the differences in approaches across the federal government sector and several commercial sectors.

From a recent client experience survey in the federal sector I can provide a little hint into the guidance agencies must follow as they develop strategic plans to align to their budget proposals and their performance plans. In 2016, the Office of Management and Budget (OMB) – which acts as the government’s Chief Management Officer – developed new guidelines, including specific guidelines for incorporating risk management ISO 31000/31010 standards. OMB did this to upgrade to the government’s version of apply Sarbanes-Oxley, called A-123, to make it more actionable. My client wasn’t used to this form of risk, even though, they identified transportation risks and mitigation recommendations after investigating a transportation accident. During my training class on leading strategic management practices, I was asked to include a module on risk management, as well as, change management. Borrowing from the PMBOK from PMI, I provided definitions and examples of what a risk is vs. an issue. An issue is something occurring now that must be immediately dealt with which has one or more key impacts (e.g., schedule delay, cost increase, quality denigration, etc.).

A risk is something that is likely to occur in the future that will likely impact the strategy or desired outcome. Typically, likelihood is assessed either as a percentage or more often it is expressed as a numerical value of high, medium, and low for both likely to occur and likely impact. Many PMP-certified project managers I have worked with typically assign a 9 to a high likelihood, a 6 to a medium, and a 3 to a low likelihood. Others have simply used 3 – 2 – 1 or 6 – 3 – 1 (there isn’t really a standard). This made intuitive sense to them, but they wondered what kind of risks they should look for and is there any approach to help them be as complete as possible (which is the OMB guidance). My recommendation was to go back to a technique I discussed earlier in the day – PESTEL. Based on the PESTEL analysis they completed during the strategic thinking and environmental scanning – that is the political, economic, social, technologic, environmental or legal – set of factors being considered, this would be a good place to start.

We worked through an exercise based on several of the factors I included in the exercise was the “aging of the population”. They deemed it high on both assessment scales. From their perspective, an aging population will cause an increase in air travel to smaller airports in “retirement destinations” (e.g., Asheville, NC or Fort Myers, FL) which were not

https://www.strategyassociation.org/admin/email/bulk_email_body.asp?id=3305670
designed for the likely increased take-offs and landings. The likelihood of an accident taxing goes up and something needed to be done to mitigate the risk from occurring. We discussed other potential risks and had fun with identifying what a policy and investigative agency could possibly do to influence greater attention on this risk. But I left that task to themselves.

So, I am looking forward to the experts, like Kim Nesbitt, to provide their insights and “how to’s” regarding identifying, monitoring, and mitigation risks to strategic execution. I hope to see you in Chicago in early May. Come, learn with me and ASP’s Board. Happy Spring!

Jim Stockmal
President, ASP

In a recent survey of executives on risks, the top three risks to their strategy were economic (91%), technology change (63%), and political (51%). These executives identified these as highly important and they were taking steps to keep abreast of these risks and to mitigate them. The next three were supply chain risk, cyberterrorism, and natural catastrophe. The next three were energy security, terrorism (other than cyber-related) and pandemic outbreaks. Pestel analysis seems to cover these.

ASP’S 2018 ANNUAL CONFERENCE

1 Week Left to Register at the Early Bird Rate!

2018 ASP ANNUAL CONFERENCE
BRIDGING THE STRATEGY EXECUTION GAP
ROSEMONT, CHICAGO
PRE CONFERENCE MAY 9
CONFERENCE MAY 10-11
10 REASONS TO ATTEND THE 2018 ASP ANNUAL CONFERENCE

1. **Network** with strategy professionals from across the globe.
2. Master how to **Bridge the Strategy Execution Gap**.
3. Hear from 3 inspiring **keynote** speakers.
4. Have the opportunity to choose from 20 **exceptional** breakout sessions.
5. Take a deep dive into **specialized strategy management** topics by attending our Pre Conference Masterclasses.
6. Gain important **insights** by attending our Mission Driven Panel Discussion.
7. Enjoy a **night out** with like-minded individuals during our **Networking Dinners**.
8. Invest in yourself and your professional **growth**.
9. Take your **lessons learned** on successful strategic execution back to your organizations.
10. Tour **Chicago**, the beautiful Windy City!

More Information:

[AGENDA]  [REGISTER]  [HOTEL]

For more information contact:
Stefanie Pavarin-Tome at

[events@strategyassociation.org](mailto:events@strategyassociation.org)

or 1-844-345-2828 x240

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Be Sure to Use the Conference Hashtag!

#ASPConf2018

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GLOBAL WEBINARS

Connecting Strategy Design and Delivery: Closing the Expensive Implementation Gap

Date: April 16, 2018  Time: 12:00 - 1:00 PM EDT
Presented by Ricardo Viana Vargas, Executive Director of Brightline Initiative™

Is your next strategic initiative doomed to fail? According to a Brightline Initiative’s survey, conducted by the Economist Intelligence Unit (EIU, 2017) with 500 senior executive leaders across the globe, only one in ten organizations successfully reach all of their strategic goals. On average, organizations fail to deliver 20 percent of their strategic projects. Ricardo Vargas, Executive Director of The Brightline Initiative, will share some insights and key findings of the research and discuss what Leaders are doing to successfully deliver their strategic objectives. Ricardo will draw connections between the research findings and the Brightline’s 10 Guiding Principles to help organizations close the expensive strategy-implementation gap.

Register >

Upcoming Global Webinar

Global Webinars Presents: Get Things Done: The Power of Connectional Intelligence

Date: May 2, 2018  Time: 1:00 - 2:00 PM (EDT)
Speaker: Erica Dhawan, CEO of Cotential

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

NPCE Presents: Inform. Inspire. Engage … Keys to Developing and Monitoring Strategic Business Plan Activity

Date: April 2, 2018  Time: 4:00 - 5:00 PM (EDT)

Register >

ASP Chicago Presents: The Role of Mid-Level Manager in Strategy Execution

Date: April 10, 2018  Time: 5:30 - 7:30 PM (CDT)

Register >

Second Chance to Rock Your Business Model Design with ASP NorCal and Business Models Inc.

Date: April 11, 2018  Time: 11:00 AM - 12:30 PM (PDT)
ASP Global Webinars Presents: Connecting Strategy Design and Delivery: Closing the Expensive Implementation Gap

Date: April 16, 2018
Time: 12:00 - 1:00 PM (EDT)

Register >

ASP Colorado Presents: Rocky Mountain Strategy Summit 2018

Date: April 21, 2018
Time: 9:00 AM - 4:00 PM (MDT)

Register >

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

ARTICLES FROM MEMBERS

The New U.S. Tax Law and Nonprofit Fundraising: Implications for Strategic Planning
By Lynne Brown, VP, Strategic Planning & Organizational Consulting, iBossWell, Inc.

As implementation of the new U.S. tax law passed in 2017 continues to roll out, everyone from individual taxpayers to business owners to accountants are scrambling to understand the full effects of this massive and complex piece of legislation. So, too, are nonprofit leaders. Analysis by some leading experts in the field is creating uncertainty and raising concern across the sector. Both the Urban Institute-Brookings Institution Tax Policy Center and the Indiana University Lilly Family School of Philanthropy (publisher of the annual Giving USA report) predict a decrease in charitable giving by individuals in 2018 as a result of provisions in the new law. Their estimates suggest the drop will range from $4.9 billion to $20 billion. Researchers at the Tax Policy Center also foresee a $4 billion drop in planned giving annually. The Center suggests this downward movement in overall charitable giving will continue in the long run. On the other side of the spectrum, organizations like the American Legislative Council argue the opposite will occur and that charitable giving will actually increase as a result of the tax cut.

Click here to read more.

ANNOUNCEMENTS

Introducing the ASP Community of Practice for Government

Welcome to the new Community of Practice, the ASP Excellence in Government Community of Practice (CoP). It is an international special interest group that will be a valuable resource to ASP members and non-members. It will serve as a network and clearing house for research, literature, tools, best practices, and resources in strategic management for all levels of government: national, regional, and local government.

The Excellence in Government CoP recognizes the diversity inherent in an international community and will provide a knowledge sharing hub for all levels of government.

Excellence in Government CoP objectives:

1. Advance Thought Leadership through:
   1. Identifying and sharing recommended practices.
   2. Providing articles related to strategic planning in government organizations.
   3. Oversight of the government research arm of ASP.
   4. Creating actionable knowledge to share with government strategy professionals.
2. Promote discussion, research, and involvement in national, regional, and local government strategic planning and management issues.
3. Create visibility for ASP broadly among government strategy professionals.
4. Connect people across ASP who have a passion for improving government through strategy management.
5. Leverage social media to support government strategy management.

Our potential initiatives:
Advancing thought leadership through:

1. Presenting webinars and virtual discussions on relevant topics in the sector.
2. Curating literature on successful practices in government strategy.
3. Sharing current research and recommendations.
4. Participating in conference presentations.
5. Networking through social media.
Our critical Success Factors

1. Community will meet its defined objectives.
2. Community will build visibility of ASP across the sector.
3. Community will drive additional ASP membership.

The Excellence in Government is poised to be a game changer for strategic planning in government.

Don't Forget to Register for ASP Colorado's Rocky Mountain Strategy Summit - April 21, 2018

The Association for Strategic Planning (ASP) Colorado, in collaboration with Regis University’s College of Business and Economics, is proud to host the Inaugural Rocky Mountain Strategy Summit, Saturday, April 21, 2018 at Regis University, in Denver.

This one-day event will feature corporate and nonprofit organization strategists focused The Art of Strategy: Planning and Implementing Corporate and Nonprofit Strategy.

ASP Nonprofit Center for Excellence First Mondays Series

#Nonprofits: Implications for Strategy

Date & Time: May 7, 2018, 4:00-5:00 PM (EDT)
Presented by: Luann Feehan, Executive Director, Nonprofit Connect

As a nonprofit leader, it's easy to get caught up in the day-to-day work of your organization and miss the bigger picture of issues affecting the social sector, including the potential impact these issues could have on your strategic direction and decision-making.

It is a time of uncertainty for nonprofits, and in response, the sector is buckling down to work harder, smarter, leaner and meaner. To do that, nonprofit leaders and strategists must regularly examine the trends affecting their organizations and the pivotal work they do in their communities. In May, First Mondays will focus on identifying some of those trends, including funding changes, generational differences, and shifts in board leadership, and discussing how to respond strategically to the changes coming down the pipe.

The session will be guided by Luann Feehan, Executive Director of Nonprofit Connect, a regional association based in Kansas City representing local, regional and national nonprofit organizations of all sizes, and for-profit businesses and community funders. In her role, Luann has her finger on the pulse of what is happening across the nonprofit landscape, and works every day to unite nonprofits, foundations, community and business leaders to strengthen their organizations and positively impact the future of the both the community they serve and the nonprofit sector.

Participation in First Mondays is free, but registration is required to participate. Because this is a shared event, we anticipate a large crowd and encourage you to reserve your seat quickly. Registrants will receive an email with connection information on the day of the discussion. Registrants will also receive a link to the recording of the presentation by mid-May.

Member Spotlight: Peter Young

Name: Peter Young
Title: Lead Consultant
Organization: Consulo Advisers

Based in Sydney, Australia, contributing locally, nationally, regionally and globally in support of the people, clients and communities I serve.

What do you do?

In my professional life I am Lead Consultant with Consulo Advisers based in Sydney, Australia, specialising in organisational strategy, transformation, growth, governance and talent formation.

I work with boards, leadership teams, senior executives and communities to craft and unleash strategy of benefit and consequence ...

- enabling and executing strategy through lean business models, sound organisational design, business and operating plans, efficient and effective management process, quantitative and qualitative
transforming stand-alone and complex organisations transcending multiple business units, embracing innovation and change readiness, engaging stakeholders in the dynamics of their business model to achieve cohesion in and between their markets, workforce and operations

- aligning organisational purpose with brand promise to achieve differentiation, growth, value advantage, resilience and impact, securing stakeholder value, evident in results
- forming and developing leadership.

I have a particular interest in ‘for profit’ and ‘for benefit’ service entities, in both the private and public sectors. My functional experience has been honed in senior management roles in Australia, Asia, North America and Europe, where I have contributed in cross-functional, multidisciplinary teams across multiple locations, delivering virtually and face-to-face.

**What do you value most about ASP?**
As I am based in Sydney, Australia, my primary touchpoint with the ASP is through the Association’s regular webinar program (how good is this new digital age?).

My experience is that ASP members (participants in webinars) are well credentialled (evident in Q&A) and that the ASP enjoys unrivalled access to distinctive practitioners (webinar presenters) who contribute enthusiastically to the development of ASP members.

**What book would you recommend for other ASP members to read?**
I'm a big reader, in an age where physical and e-books, journals, podcasts, webinars and videos, abound, on-demand.

I recommend that ASP members read as widely as possible in their chosen specialist field(s) and augment their situational learning with contextual material from adjacent fields, so they can better understand how their specialist learning can be contextually applied.

For better value, join a book club or meet-up group where you can share and explore your ‘book learning’ with like-minded colleagues. Often, it’s not what you read, it’s how others interpret what you have read and better understand, that makes a difference.

**Let Us Spotlight you Next Month!**
We want to let ASP members know who you are! To be featured in our member spotlight in a future issue and on the ASP website, just 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.

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**CERTIFICATION CORNER**

**Are you Certifiable? A Kick-Off for Certification Study**

This full day pre-conference course offers exposure to key strategy concepts that candidates for ASP certification in either SPP or SMP would need to understand to be successful. The course surveys key concepts in the four domains of our certification program: Lead, Think, Plan and Act. In each domain, a successful candidate answers multiple choice questions involving three strategy elements: content, process and context.

This course is designed to be a kick-off for your study plan. This course will help you assess how much and what kind of study you would need to do to be successful on an ASP certification exam. We will also help you develop a study plan for success.

**2018 ASP PRE-CONFERENCE: WEDNESDAY, MAY 9, 2018**

9:00 AM - 4:30 PM
$300 (breaks and lunch included)
MEMBERSHIP CORNER

Welcome to new members who joined in March 2018!

Atlanta Chapter

- Shenila Rodriguez
- Robert Whitemore, Strategic Consulting Partners

Honduras Chapter

- Juan Carlos Fiallos

Members at Large

- Mary Grinstead, Des Moines Public Schools
- Tselane Chicks, Denel Dynamics
- Chad Bolten
- Tim Pitsch, Plexus Corp.
- Allison Henry, Saputo Dairy Foods USA
- Pete Needham, Next Dimension
- LaRita Barber, Goodwill Industries of the Southern Pedmont
- Sheryl Traficano, National Certification Board for Diabetes Educators

National Capital Area Chapter

- Marie Custode, Fairfax County Health Department

Los Angeles Chapter

- Steve Morgan, Bank of America Corporation

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