

# The Strategic Edge



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Please submit your strategic planning news to [ASP](#). Articles should not pitch services or products, but add value by providing strategic planning insight, "how-to's" or case studies for our readership.

## Message from ASP's President



This coming year will be exciting for ASP. The leadership of Don Ricketts and Tim Trotter, the committed boards they enjoyed working with, our great chapter leadership and passionate individuals all over ASP have positioned us well.

I am reminded of a great question: "When is the best time to plant a tree?"  
Answer: 20 years ago.

I am proud to say that our tree has already been planted by our immediate

past leaders

ASP-wide and our Hall of Famers. Please see who is in this "Hall" on our [website](#).

Our task is to nourish our tree and also manage any risks that could harm it. I applaud the talents of our current leadership far and wide in ASP – the national board, chapter leadership and prime movers with keen and smart ideas. These individuals bubble up from everywhere and this is great. Matching the time and talents of our volunteers with their passions is the water and fertilizer for our tree. Our task is to nudge those passions toward the key success factors that will allow us to continue to architect and then to deliver a unique value that is demanded by a large enough group to make us financially healthy. OK, corny metaphors aside.

I am ever-confident this has the best chance of happening with our new partner, CMA, our association management firm, as they provide us with the day-to-day management, infrastructure, marketing and much more to help make this happen.

As a "prime mover among co-equals"—the title I really like—I have inherited a strong position. I will do everything in my power not to let you down. More positively, I pledge to contribute to help us as a team of teams with steps forward.

I think the fields of strategy and strategic planning are poised for exciting change, even as global economies continue to sputter. Naysayers say that cost reduction is the only practical stance – sort of a "wait and see" position and that strategy should take a back seat. I disagree as I think these naysayers do not know what strategy really is. In part strategy is about striving for uniqueness, even if it cannot be attained. It is the striving and trying that are crucial. But while we may never abandon tried and true laws of strategy in free market economies, I think the contexts around strategy will change in huge ways every five years. One of the definitions of context is "...what comes before and after to give something meaning." Is the context for an American Fortune 500 company different than the context for a group of young entrepreneurs in China thinking through a major new venture start-up? I think yes. Do you? Think of all of the possible nuanced contexts even in the United States and how they could change in as early as the next five years. What new insights as to what a robust strategy even is will emerge? Will the Body of Knowledge for our valued Certification Program need tweaking as well? These are exciting times for strategy.

Your board this year includes these returning stalwarts:

Neelima Firth – Vice President

## Our Mission

ASP is a non-profit professional society whose mission is to help people and organizations succeed through improved strategic thinking, planning and action.

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Jennifer Beever – Director at Large, Marketing Chair  
Tom Carter – Director at Large, Certification Team  
Alan Leeds – Director at Large, Alliances Chair  
Jennifer von Briesen - Director at Large, Membership Chair

And we are very pleased to have these five new members joining the board:

Michael Bischoff - Director at Large  
Lee Crumbaugh - Director at Large  
Robert Hockin - Director at Large  
Joe Pitarri - Director at Large  
James Stockmal - Director at Large

And as we sadly communicated a short while ago, Stephen Haines passed away on July 2nd. He was looking forward to returning as a board member. He will be sorely missed.

This will be an exciting journey together. I am up for the task and I know you are as well. Please call me at 318-797-5213 or email me at [bigler@lsus.edu](mailto:bigler@lsus.edu) to discuss anything. Let's have a great year together.

Bill Bigler, President 2012-2013

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### In Memoriam: Stephen Haines, ASP Pioneer and Leader

Stephen Haines, ASP Pioneer and noted strategic planner and systems thinker, passed away Monday, July 2, 2012. Steve fought a private and brave fight against cancer, which unfortunately has taken from this earth a great person, husband, father, leader and great friend to many. He is survived by his wife Jayne, sister Linda Waldt, daughter Monica and the light of his life, grandson Sebastian.

Steve was a CEO, entrepreneur, master facilitator and strategist who in 1990 founded the Haines Centre for Strategic Management, with partners in over 20 countries. He had over 30 years of executive experience leading planning, leadership, and change efforts in the U.S., Canada, and globally. He was a global leader in developing and championing the systems thinking approach to strategic planning and management.

Steve was the #1 most influential Strategic Planner on Twitter, as ranked by Follow Me. He was in high demand as a keynote speaker and was a prolific author of over 16 books.

Steve was very proud of being a U.S. Naval Academy engineering graduate with the "Legendary Leadership Class of 1968" and was class VP. While in the US Navy, he flew jets and was a shipboard officer.

His interest in systems thinking was sparked while taking PhD level courses at George Washington University. He was part owner of University Associates Consulting and Training Services. During his corporate career, he was EVP at Imperial Corporation of America, SVP of Freddie Mac, and a member of eight top management teams.

Steve played major leadership roles in ASP and was inducted into the ASP Hall of Fame in 2011. He was an active ASP Board member for many years and has served as Vice President. He was the founder and sparkplug for the San Diego ASP chapter and stayed actively involved in chapter recruiting, programming, and leadership.

Perhaps his greatest contribution was in establishing the ASP certification process, which he championed and led from day one, guiding teams that established a governance structure, developed a Body of Knowledge, created a qualifying exam and set up an administration process. He earned the distinction of being a Strategic Management Professional Pioneer and was proud to be awarded SMP #001. He will long be remembered as "Father of ASP certification."

He was also instrumental in many other key ASP initiatives, including establishing an International Affiliates program, helping ensure ASP financial stability through difficult times, and mentoring the development of several new chapters and their leaders. Steve was vocal in promoting strategic planning for use by ASP itself, and was both passionate and outspoken in his views.

In lieu of flowers, the family requests donations to Pacific Beach Presbyterian Church. Cards may be sent to the Haines Family at 1420 Monitor Road, San Diego, CA 92110.

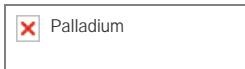
Please take a minute to reflect on the life of such a talented person. We will all miss him.

Sincerely from the 2012-2013 ASP Board of Directors and members of the ASP Hall of Fame.

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**Exclusive ASP Offer: Register Today and Save Hundreds on our "Leading Strategy Execution" Summit in Boston**

ASP is partnering with The Palladium Group to engage with the world's top business leaders as ranked by the "Thinkers50!"



### October 17-18 Leading Strategy Execution Global Summit in Boston, MA

The **Leading Strategy Execution Global Summit**, premiering October 17-18 in Boston, MA, will bring together today's foremost authorities and thought-leaders on strategy and business in an enlightening and collaborative fashion. The summit will include expert insights, panel debates and knowledge-sharing, and is designed to stimulate your thinking and provide actionable solutions.

#### Leaders from around the world identified their most critical challenges and opportunities as...

- Growth
- Strategy
- Leadership
- Change
- Customers
- Innovation
- Shared Value
- Talent
- Competition
- Globalization

The Global Summit will tackle these topics and provide you with the frameworks needed to make a positive difference for your organization.

#### Learn from experts...

- **Double-Digit Growth**, Dr. Michael Treacy
- **Human Capital**, Dr. David Ulrich
- **Global Strategy**, Dr. Anil K. Gupta
- **Customer Management**, Dr. Martha Rogers
- **Shared Value**, Dr. Robert S. Kaplan
- **Strategy Execution**, Dr. David P. Norton
- **Grow Talent**, Dr. Cassandra Frangos
- **Business Challenges**, HBR Editor, Adi Ignatius

Seating is limited. Reserve your space today.

For \$500, ASP members can attend all of the Palladium Summit's keynote speakers' sessions on October 17th as well as three additional ASP-only keynotes during the breakouts.

Visit <http://www.strategyplus.org/chapters/National.php> or [click here](#) for the latest agenda. For ASP members who want to attend more than one day, Palladium is offering an \$800 discount (off its standard pricing packages that range from \$2,895-\$4,495).

Please contact Jennifer von Briesen, ASP Summit Chair and Boston Chapter President, at [aspboston@strategyplus.org](mailto:aspboston@strategyplus.org) for questions.

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### ASP Announces Newly Certified Strategists

ASP is pleased to announce the names of those who successfully passed the May 2012 Certification exam.

The purpose of the ASP Certification Program is to establish a high-level of quality and consistency within the strategic planning and management industry so that strategic planners and those responsible for developing and deploying strategy can assist organizations in meeting and exceeding the challenges of the 21st century. ASP offers three types of certifications: **Level I Strategic Planning Professional (SPP)** and **Level II Strategic Management Professional (SMP)**, and a designation, the **Strategic Planning Associate (SPA)**, for those new to strategic planning. ASP members, as well as non-members, are eligible to apply for Certification.

Deadline for submitting a Qualifying Application for the upcoming October 2012 testing is Friday, July 27, 2012. Additional details are available at <http://www.strategyplus.org/asp-certification/exam-testing-program.html> or send an inquiry to [CertificationProgram@strategyplus.org](mailto:CertificationProgram@strategyplus.org).

Congratulations are extended to the following individuals:

#### Strategic Planning Professional (SPP)

Jennifer Bigos	Cisco Systems, Inc.	Show Low, AZ	ASP-Phoenix Metro
Michael Hay	Ontario Ministry of Agriculture and Rural Affairs	Guelph, Ontario	Member-at-Large

Strategic Management Professional (SMP)

Candace Laing	US Military Entrance Processing Command	North Chicago, IL	Member-at-Large
Richard Taylor	U.S. Army Corp of Engineers	Winchester, VA	ASP-NCA
Rosalyn Wielenga	Good Samaritan Society	Orange City, IA	Member-at-Large

Sar  
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Jerr  
Par  
Rob

A landmark national survey regarding successful practices in strategic planning for non-profit 501c3 organizations was conducted by the Association for Strategic Planning (ASP), with support from the University of Arkansas Department of Political Science, in March 2012. Initial findings of the 1000+ responses were reported during the May 2012 ASP Annual Conference. These findings included the following three items of significant interest to advocates for the strategic planning process in this sector:

- The driver for strategic planning in high-success organizations is "Routine periodic process in our organization." Whereas in low-success organizations, the driver for planning is "Driven by significant risks/challenges"
- Successful organizations report having successful plan-implementation practices; low success organizations report that they do not have successful implementation practices.
- Highly successful organizations report that strategic planning has high impact on overall organizational success. Low success organizations do not report strategic planning as key to overall organizational success.

[Click here](#) for additional details of initial findings.

Further analysis of the data will be conducted later in 2012 to determine other significant findings of this research. For future information on this research, contact Denise McNerney, ASP Research Analysis Sub-committee Lead: [dmcnerney@ibosswell.com](mailto:dmcnerney@ibosswell.com)

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## Feature Article

### Execution of Strategy Demands Strategic Communications

James D. Stockmal  
Deloitte Consulting, LLP and ASP Board Member

An inherent challenge in executing new organizational strategies is the ability to align the organization to the strategy and explain its rationale. In creating alignment and connectivity across organizational boundaries there is often a "headquarters/field phenomenon," observed in both public and private entities, where the field perceives that headquarters is out of touch and provides little value, while headquarter perceives the field as unwilling to "get on board." As we have learned from the field of change management, "getting on board" is affected by a number of underlying issues, such as anxiety over the unknown, fear of losing control, perceived loss of power, misunderstanding the rationale, distrust, and other factors of resistance to the new strategy.

How can leaders and their organizations use strategic communications to overcome these challenges and deal effectively with the likely natural resistance to the new strategy? How do leaders harness the inherent energies and talents of the organizations involved to make execution successful? How do leaders help their organizations keep an eye on current operations while helping to make them understand the need for the strategy, internalize the strategy, and execute?

Working with commercial and public services organizations around the globe I have found that successful leaders deployed strategic communications, coupled with tactical actions to influence adoption and execution of the strategy. Savvy leaders know there are several guiding principles to strategic communications to support strategy execution:

- **Who** delivers the key messages is just as important as **what** the messages are about.
- Focus on sincere engagement of the organization, taking time to explain the strategy, answer questions, and address their issues and concerns. Otherwise the "headquarters vs. field" disconnect can be reinforced.
- Hold the unit leadership accountable for communicating in their own words the importance of the strategy, escalating issues if they are not able to address them, rather than trying to manage down to the task level across the enterprise.

- Create strategy execution roles at every level that leverage existing organizational structures and cultural norms. For example, create strategy implementation teams for each unit so they can manage the execution of the strategy against existing operational duties and provide hands-on support where and when needed.

Successful leaders complement these strategic communications and change management strategies with structured, multi-channel tactical efforts to drive broad-based execution. Lastly, the use of communication feedback mechanisms and measures provide periodic checkpoints on the effort and can help drive strategy implementation accountability. By continually “taking the pulse” and analyzing feedback from tactical communications leadership, you can measure understanding of the strategy, the level of adoption, and provide additional insight into potential points of resistance that need to be addressed. For example, updating strategic leadership action plans to address “hot button” issues that may have popped up through a town hall style communication session. Planned strategic communications, based on on-going analysis and measurement of key metrics coupled with tactical multi-channel communications is a comprehensive approach to integrate multiple organizational perspectives into a more robust and successful strategy execution.

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## Facilitating Strategy: Developing a Mission Statement

### Part 1 of a Six-Part Series

By *Michael Wilkinson, CMF*

*This is the first of a six-part series designed to provide ASP members additional tools they can use right away to facilitate strategy with their internal and external customer teams.*

How do you facilitate a team through mission creation?

A core component of an organization’s strategy is a clear and concise mission statement. While the mission is a core component of strategy, we strongly advise against writing a mission statement as the first, second or even third activity in a strategy planning session.

If you have been through the typical mission writing exercise, you probably understand the reason behind this recommendation. Planning teams typically spend hours and often days haggling over the exact wording for the mission. And while the words are important, there could be significant benefit gained from using a process that helps the planning team move quicker to consensus. We use the **Drivers Model** to guide organizations through the various phases of strategic planning.

### Why is Developing a Mission Statement So Difficult?

In analyzing the challenge that groups have in developing mission statements, we have concluded that a key source of the difficulty is that the group is trying to answer three questions all at the same time: Who are we? What do we want to be? How do we put this in a small pithy sentence?

What can make developing a mission statement so frustrating is that you can have all three discussions occurring simultaneously because conclusions have not been reached on the three elements separately. For example, while one person is arguing over changing a word, another is arguing over a concept that appears to be missing, while a third is insisting that the mission should be aspirational.

Our process for creating mission statements is to answer the following questions, in this order:

1. Where are we now and what key trends will impact our success in the future? (SWOT analysis and/or positioning against trends)
2. What might success look like 10 years in the future? (visioning)
3. Given this description of success, what are the broad goals for long-term sustained success? (goal statements)
4. Given these goals, what does this imply that our mission is? (mission statement)

Let’s take a look at a case study in which this was done.

**[Click here to read the full article.](#)**

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## ASP Annual Conference

Stay tuned for the latest news about the 2013 Annual Conference...to be held in Atlanta, Georgia!

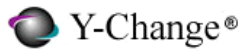
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### Membership Matters

This section of the newsletter is where we will highlight ASP member achievements both personal and professional. Please send any announcements to the association at [info@strategyplus.org](mailto:info@strategyplus.org). Please keep submissions under 50 words.

For information about ASP membership benefits or to submit your business and/or professional news, please view the following pages on ASP's website and contact ASP by **email** or by phone at 877-816-2080.

- [Individual Membership](#)
- [Corporate Membership](#)
- [International Affiliate Program](#)  
(for groups outside the USA who wish to become formally associated with ASP)

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### New Members – Welcome!

#### Chicago

- Kathy Clark, *Northwestern Mutual*
- Thomas Croxford
- Steven Kaplan
- Venugopal Shan

#### Florida

- Robert Fullington, Chief Strategy & Technology Officer, *Fortegra Financial*

#### Los Angeles

- Alvaro Aznar, General Manager, S.A.
- Kim King, President/CEO, *Strategy Advantage*

#### Member-at-Large

- Craig Gordinier, Operations Manager, *Lafarge*
- John Mungai, Senior Financial Analyst, *Boston Scientific Japan*

#### Orange County

- Kevin Lytle, President, *Member Allegiance*

#### Phoenix Metro

- Manasi Ramanna, Director, Strategic Planning and Business Development, *Ulthera*

#### San Diego

- Shawn Lowery, *NAMM*

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We look forward to communicating with you online!



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