

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT



Self Assessment Workbook: Level I

The Association for Strategic Planning's

**Body of Knowledge
For Certifying
Strategic Planning Professionals (SPP)
and
Strategic Planning Apprentices (SPA)**

BEST PRACTICES



**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

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*Association for Strategic Planning's Body of Knowledge Component for Certifying
Strategic Planning Professionals and Strategic Management Professionals*

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Professionalism

“Whatever is worth doing at all is worth doing well.”

—Lord Chesterfield

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

This Body of Knowledge Level I workbook was designed by the Association for Strategic Planning Core and Extended Core Program Teams.

This Body of Knowledge Level I workbook was designed and produced by Joyce Evans, Manager of Products and Services of the Haines Centre for Strategic Management.

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

Program Introduction

A vision and mission were the starting point for the Association for Strategic Planning’s development of this Body of Knowledge to guide the professional certification of planning professionals in the United States as well as internationally. We hope that this becomes the world-wide industry standard.

This document was developed by a Core Team of eight highly skilled ASP senior level professionals (names below) who were supported by an Extended Team of 14 other senior level professionals.

Leanna Blackmon’s critical skills helped us in making it all come together.

We also are indebted to our corporate sponsors for their support for this vital project:

**Delta Community Credit Union—Sundt Corporation
Washington Suburban Sanitary Commission
Haines Centre for Strategic Management—Balanced Scorecard Institute**

However, the data and opinions used in developing this document came from interviews we conducted with over 20 other planning certificate or certification programs in both the private and academic sectors in keeping with the ASP overall mission of whom we serve. In addition we asked for the ideal future vision from the ASP Chapters as well as the ASP Board of Directors and members of both our Core and Extended Teams. We were pleased to have the opportunity at the ASP 2009 Annual Conference in San Diego for further critique and views on the details of this Body of Knowledge.

Signed:

Terry Schmidt

Frank Mruk

Steve Haines

Sara Brann

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Jim McComb

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Tom Carter

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ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

Table of Contents

“The Body of Knowledge leading to the competencies of the planning field”

- I. Certification Program Process
- II. Vision and Mission of this Certification Program
- III. Expectations and Model of the Level I Certification: *Strategic Planning Professional*
- IV. Expectations and Model of the Strategic Planning Apprentice
- V. Body of Knowledge Framework

Level I

Business Acumen

1. Lead

- 1.1 Personal Credibility
- 1.2 Interpersonal skills

2. Think

- 2.1 Content
- 2.2 Processes
- 2.3 Infrastructures

3. Plan

- 3.1 Content
- 3.2 Processes
- 3.3 Infrastructures

4. Act

- 4.1 Content
- 4.2 Processes
- 4.3 Infrastructures

5. Strategic Planning Professional Foundation

- 5.1 Professional Roles

Level II

Strategic Business Acumen

1. Strategic Leader

- 1.3 Planning Teamwork
- 1.4 Cross-Functional Teams
- 1.5 Organization-Wide

2. Strategic Thinking

- 2.4 Content
- 2.5 Processes
- 2.6 Infrastructures

3. Strategic Planning

- 3.1 Content
- 3.2 Processes
- 3.3 Infrastructures

4. Strategic Action

- 4.4 Content
- 4.5 Processes
- 4.6 Infrastructures

5. Strategic Management Professional Foundation

- 5.2 Professional Roles

Note: The terminology used here applies to all kinds of organizations—private, public, military, and not-for-profit, as well as internal and external roles within those organizations. However, when terms such as “corporate” are used in this document, they are meant to apply to all these kinds of organizations.

VI. Think—Plan—Act Bibliography

- Strategic Thinking
- Strategic Planning
- Strategic Action and Change

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

Certification Program Process

Based on the vision and mission, the Strategic Planning Certification Credentials were developed with a number of components:

1. **Market Needs**—an extensive survey was conducted with ASP members regarding their wants, desires, and benefits of planning certification. The results included a resounding “yes” to this need.
2. **Best Practices Research**—a detailed set of interviews were conducted with over 20 firms and universities to ensure a best practice Body of Knowledge for the 21st Century. Also the certification development process itself included interviews and process reviews with over 10 other excellent associations such as PMI, SHRM, ASTD, etc. so as not to reinvent the wheel.
3. **Phase I**—to develop a best practice Body of Knowledge in the Strategic Planning Field (embodying ASP’s Think—Plan—Act mantra) for both Levels I and II below.
4. **Phase II**—to develop an ongoing certification process that would include these components
 - ◆ Body of Knowledge exams with an ethics consideration
 - ◆ Registered Educational Providers (REPs) to provide the education
 - ◆ Independent governance structure
 - ◆ An application process and criteria that take into account an applicant’s life, jobs, experiences and education
 - ◆ Administrative support to run the day-day certification program for ASP
 - ◆ Independent Testing Service
5. This project has been supported by extensive outreach and inclusiveness to everyone interested in this project, soliciting their feedback, critiques, and recommendations to improve the result.

Results—Credentialing at these Levels of Professionalism

1. Strategic Planning Professionals (SPP)—Level I
2. Strategic Management Professionals (SMP)—Level II
3. Strategic Planning Apprentice (SPA) Designation

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

Our Body of Knowledge represents current best practices in the field of Strategic Planning and is the result of interviewing the best 20+ firms and advanced educational institutions we could collectively identify that teach Strategic Planning in some form. In addition, we reviewed their course purposes, benefits, and agendas where these existed.

These organizations were identified collectively by our seven Core Project Team Members and our roughly 20 Extended Team Members. We were able to identify everything that was being taught in 2008-09 that is relevant in the 21st Century. This Body of Knowledge is what these many organizations, senior level professionals and faculty members collectively believe represents a set of reasonable, common sense, and important knowledge about Strategic Planning that if properly applied, would lead to significantly improved organizational results.

It is organized under the rubric of Think—Plan—Act that is the identity of our Association.

Since the first draft, this Body of Knowledge has undergone extensive review, critique, and revisions to represent a consensus version of the desired knowledge required by successful practitioners, both within and outside of ASP.

Our final review will be with an Advisory Board of Pioneers consisting of the most distinguished professionals in the field who are members of ASP. This will be the final check on our work and is part of the Pioneers developing the two testing exams (questions and answers).

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

Year 2012 Vision of this Certification Program

We have a rigorous and prestigious global level ASP Strategic Planning Body of Knowledge, and certification for individual planning professionals (both ASP members and non-members).

This certification is recognized as the best in the Strategic Planning and Strategic Management Field, and is clearly distinguishable from any other certification or certificate program.

Year 2010 Certification Program Vision Details

- ◆ This certification and its Body of Knowledge establish best practices and clear professional standards.
- ◆ The certification program is based upon objective criteria that covers the full set of knowledge associated with the Body of Knowledge (BOK) of Think—Plan—Act in Strategic Planning.
- ◆ This certification recognizes expertise gained from appropriate life and work experiences.
- ◆ ASP's BOK and certification process will be established using rigorous criteria, which include in keeping with the standards of the national organizations that offer certification programs.

Year 2009-2012 Mission of this Certification Program

This certification program enables ASP members and non-members to become highly knowledgeable and skilled professionals in Strategic Planning (Think-Plan-Act), and to be recognized as such.

2009-2012 Mission details

- ◆ To improve the quality of Strategic Planning as a profession. The field has a mixed reputation because many old traditional practices are still followed that do not work well.

Expectations and Rough Profiles for the Levels of ASP Certifications

I. LEVEL I—Strategic Planning Professional (SPP)

1. At least two years experience in a planning role or as a junior external consultant with a college degree.
2. Ethical, has integrity and knows how to keep things confidential.
3. Manager of themselves first, then able to collaborate with others.
4. Interpersonal leadership skills with executives on a one-one basis such as coaching, advising, etc.
5. An accomplished analyst in future environmental scanning and current state assessment (SWOT).
6. Excellent critical thinking skills and a basic understanding of strategic and systems thinking.
7. Frequently works with executives and their organizational units such as business unit heads or managers/leaders of major staff units and their teams
8. Facilitates actions, execution, and implementation of the strategic and annual plans.
9. Has a working knowledge of change management and the processes and infra-structures that successful change requires.
10. Demonstrated mastery of selected parts of this Body of Knowledge those REP Courses/PDUs.

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

Level One Certification
STRATEGIC PLANNING PROFESSIONALSM (SPP)



Strategic Planning Apprentice Designation

Expectations and Rough Profile for the designation of an *ASP Strategic Planning Apprentice* (No Level/Certification)

1. No years experience necessary in a planning role or as a junior external consultant.
2. Someone just starting out in planning or transferring their career into planning from another discipline such as marketing, finance, HR, or OD.
3. If a student, then in their last year of school (Undergraduate or Graduate degree) with the prospects of graduating within 12 months.
4. Does not need, and is not required to have Business Acumen yet.
5. Demonstrated mastery of the same selected parts of this Body of Knowledge as the current Level I (SPP) Strategic Planning ProfessionalSM through passing the SPP Level Test Examination (ASP may grant scholarships for those in need).
6. Ethical, has integrity and knows how to keep things confidential based on two Character/Professional References.
7. Academic Transcripts to show their academic background and degrees obtained or expected in the next 12 months
8. Willingness and ability to be mentored and form an Apprentice with a more senior level Planner specifically identified and provides them with a Letter of Reference.
9. Manager of themselves first, then able to collaborate with others.
10. Knowledge of interpersonal leadership skills with executives/managers on a one-one basis such as coaching, advising, etc.
11. Excellent critical thinking skills and a basic understanding of strategic thinking and systems thinking.
12. Understands how to facilitate actions, execution, and implementation of strategic and annual plans.
13. Expected to be come a Strategic Planning Professional within three years by submitting an application and has six CEUs/90 PDUs from REPs/ASP (and re-taking exam) and paying the application and examination fees.

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

BUSINESS ACUMEN

As we said in the Introduction, professional planners must also have a high degree of **business acumen** and technical/content knowledge about the industry and sector in which they are working. However, this business acumen is not a simple and universal set of Standards common to every organization.

Therefore, we have elected NOT to attempt to build a common set of business acumen standards, but rather have the Certification Process include the applicant’s demonstration of this important factor in their life and career experiences.

Some of these business acumen areas might include, but are not limited to the following (illustrative only):

HOW DO YOU EVALUATE YOURSELF?

I.	Executive Presence	(L)ow	(M)ed	(H)igh	Comments
	Professionalism				
	Confidence with CEOs				
	Communication Skills—oral and written				
HIGH TOTALS:					/out of 3
II.	Customer	(L)ow	(M)ed	(H)igh	Comments
	Sales/Pricing				
	Marketing				
	Merchandising/Placement				
	Advertising/Promotion				
	Customer Service/Complaints				
	Information/Data				
	Branding				
HIGH TOTALS:					/out of 7

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

III. Finances	(L)ow	(M)ed	(H)igh	Comments
Financial Analysis/reading Financial Statements				
Accounting				
Budgeting				
Treasury/Cash Management				
Capital Financing				
Regulatory Compliance				
Global Finance				
Consumer Finance				
Mortgage Banking				
Insurance				
Investment Banking				
				HIGH TOTALS: /out of 11
IV. Technology	(L)ow	(M)ed	(H)igh	Comments
Computers and IT				
Telecommunications				
Other Technology				
Knowledge Management				
Information Management				
Research and Development				
				HIGH TOTALS: /out of 6
V. Products and Services	(L)ow	(M)ed	(H)igh	Comments
Engineering				
Design of Products/Life Cycle				
Product and Service Knowledge				
Manufacturing				
Innovation and New Product Service/Development				
				HIGH TOTALS: /out of 5

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

VI.	Delivery/Logistics/Process	(L)ow	(M)ed	(H)igh	Comments
	Supply-Chain Management				
	Purchasing				
	Distribution/Warehousing				
	Delivery Channels				
	Process Management				
	Operations				
	Outsourcing				
	Benchmarking				
					HIGH TOTALS: /out of 8
VII.	Administration	(L)ow	(M)ed	(H)igh	Comments
	Legal Matters				
	Safety				
	Administration				
	Facilities				
	Regulatory Compliance				
					HIGH TOTALS: /out of 5
VIII.	Human Resources	(L)ow	(M)ed	(H)igh	Comments
	Talent Management				
	Recruiting/Selection				
	High Performance Development/Improvement				
	Compensation/Benefits				
	Labor/Union Relations				
	Cultural Influence/Issues				
	Development and Succession/Training				
	Ethics Management				
	Regulatory Compliance				
					HIGH TOTALS: /out of 9

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

IX.	Environmental Scanning	(L)ow	(M)ed	(H)igh	Comments
	Business and Competitor Scanning and Intelligence				
	Global Marketplace				
	Suppliers/Venders				
	Sector Dynamics				
	Competition/Substitutes				
	Customers				
	Industry Dynamics				
	Strategic Alliances				
	Trend Tracking/Research				
					HIGH TOTALS: /out of 9
X.	Research Methods	(L)ow	(M)ed	(H)igh	Comments
	Knowledge about Databases				
	Internet Research				
	Source Evaluation and Verification				
	Use of Competitor Intelligence				
					HIGH TOTALS: /out of 4

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

XI.	Society Acumen	(L)ow	(M)ed	(H)igh	Comments
	Citizenship and Governance				
	Community Actions/Leadership				
	Political Campaigns				
	Government Agencies				
	Social Responsibility				
	Peacemaking				
	Environmentalism				
	Special Interest Groups				
	Government Planning				
	Content Production				
	Course Development				
					HIGH TOTALS: /out of 11
XII.	Thought Leadership	(L)ow	(M)ed	(H)igh	Comments
	Use of Competitor Intelligence				
	Think Tank Activity				
					HIGH TOTALS: /out of 2
XIII.	Cross-Cultural Communications	(L)ow	(M)ed	(H)igh	Comments
	Second Language Fluency				
	Multi-year Residence in more than one country				
	Multi-Country Business Experience				
	Implementation of Cross-Cultural Change Management				
	Sensitivity and Knowledge of Cultural Custom				
					HIGH TOTALS: /out of 5

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

XIV.	Strategic Management	(L)ow	(M)ed	(H)igh	Comments
	Strategic Thinking				
	Strategic Planning				
	Strategic Change				
HIGH TOTALS:					/out of 3

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

Business Acumen Summary					
Section		# Of Highs	Out Of	Total Percentage	Comments
I.	Executive Presence	/	possible 4 =	%	
II.	Customer	/	possible 7 =	%	
III.	Finances	/	possible 11 =	%	
IV.	Technology	/	possible 6 =	%	
V.	Products and Services	/	possible 5 =	%	
VI.	Delivery/Logistics/Process	/	possible 8 =	%	
VII.	Administration	/	possible 5 =	%	
VIII.	Human Resources	/	possible 9 =	%	
IX.	Environmental Scanning	/	possible 9 =	%	
X.	Research Methods	/	possible 4 =	%	
XI.	Society Acumen	/	possible 11 =	%	
XII.	Thought Leadership	/	possible 2 =	%	
XIII.	Cross-Cultural Communications	/	possible 5 =	%	
XIV.	Strategic Management	/	possible 3 =	%	
Grand Total		/	possible 89	%	

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

Our Body of Knowledge Framework

There are five fundamental components that together make up this BOK Framework. They represent the standards that planning professionals must know in order to be credentialed by the Association for Strategic Planning and warrant the use of our certification credential and designation.

These “Components” include

- 1. Think-Plan-Act**—ASP has adopted “**Think-Plan-Act**” as its mantra and framework for strategic planning. This then becomes our framework for the Body of Knowledge in this Certification Program because planning in the 21st Century is now recognized for what it is: PLANNING FOR CHANGE. Our goal is that there are no more planning functions contributing to the SPOTS Syndrome—the Strategic Plan on the Top Shelf...gathering dust.
- 2. Lead**—Planning and change are the **primary jobs of leaders** in all organizations; including the planning profession to which this certification is aimed. For this reason, leadership is required for good planning/change professionals. Staff leaders do not lead organizations. They provide leadership, support, coaching, advice, guidance, facilitation, logistics, and staff functional expertise to the line executives who lead the organization.
- 3. Strategic Planning Reality**—In addition, the Field of Systems Thinking and Organization Effectiveness and Change view that every situation in life has three components occurring at the same time. This is the reality of life and sometimes called The Iceberg Theory (see next page).
 - 1).The **content** of the Think-Plan-Act discussions
 - 2).The **processes** themselves that are going on during the Think-Plan-Act discussions
 - 3).The **infrastructures** or context within which the Think-Plan-Act occurs
- 4. Business Acumen**—Professional planners must also have a high degree of **Business Acumen** and technical/content knowledge about the industry and sector in which their organizations compete. However, this business acumen is not a simple and universal set of standards common to every organization and sector. Therefore, we have elected NOT to attempt to build a common set of business acumen standards in our BOK, but rather have the certification process assess the applicant’s knowledge of this important factor through their life and career experiences.
- 5. Foundation**—A key fundamental, often overlooked, that is crucial to a successful professional is being an expert on their role. This is especially confusing in many organizations between roles of Board of Directors, CEO,

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

Collective Senior Management Team, Line and Division Management. Failure to know and follow this Foundation and clarity of the respective roles “*builds in failure up front.*” Setting the roles clearly and properly “engineers success up front.”

Body of Knowledge Terminology

Final Exam Issues And Terminology:

Please note the below items which, after working through the SPP exam Questions and Answers, some important clarifications should be kept in mind.

1) **Terminology.** Please utilize non-bias terminology as follows:

a. Profit/Nonprofit Neutral: Replace the term "Corporation" “Company”, “Firm” or "Nonprofit" with "Institution" or “Organization” or “Enterprise” whenever possible.

b. Western/Eastern Neutral: Please keep references appropriate for a global audience.

c. Gender Neutral: Please keep references gender neutral.

d. The term “chief executive” is preferred to CEO which is private sector usage. The public sector and not-for-profits have terms like Executive Director, Superintendent, etc. so we think chief executive is the most generic term (no capitals either).

2) **Strategic Planning Terminology:** We are trying to create a clear and concise use of standard terms in the Strategic Planning Field and believe the below to be a consensus of the final Exam Team’s understanding:

a. Emphasize Strategic: Replace the terms "Management" or "Planning" with "Strategic Management" or "Strategic Planning" whenever possible as this is a Strategic Planning Association and Certification.

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

b. The term Strategic Plan is preferred rather than just Strategic Direction unless there is no Strategic Plan.

c. The term “Strategy” is defined as the high level, more strategic Content in the Strategic Plan rather than the Strategic Planning Process, so be careful of the frequent misuse of this “Strategy” term.

d. The term “Strategy”(singular) is also used by some to define the **primary means** , or the “strategies (plural) to achieve the Vision”.

e. Strategy is also used as defining the **end or result** as in THE STRATEGY (Singular). Preferably here as an end would be terms such as “Competitive Advantage/Edge” or “Positioning” instead.

3) It is important to note that Test Question Typologies include "Case Studies" and "Diagram Interpretation" Questions. All Questions are then placed in a "four Multiple Choice" framework. No True/False Questions and Answers.

4) It is also very important on where and how Strategic planning and Strategic Management is located in the organization. The Roles section of the BOK is very important and its clarity should be emphasized in your preparation. It was agreed that:

a. The "Strategic Planning Function" is generally housed in the "Strategic Management Department/Office" of an Organization with responsibilities for Lead-Think-Plan-Act as per the BOK. (remember Lead is a staff leadership or advisory role—not chief executive leadership.

b. The Strategic Management Department/Office is generally led by the "Chief Strategy Officer (CSO)". This CSO is a term we would like to make a standard in the Field just like CFO, CAO, CLO, CIO, etc. so it gets the same respect.

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

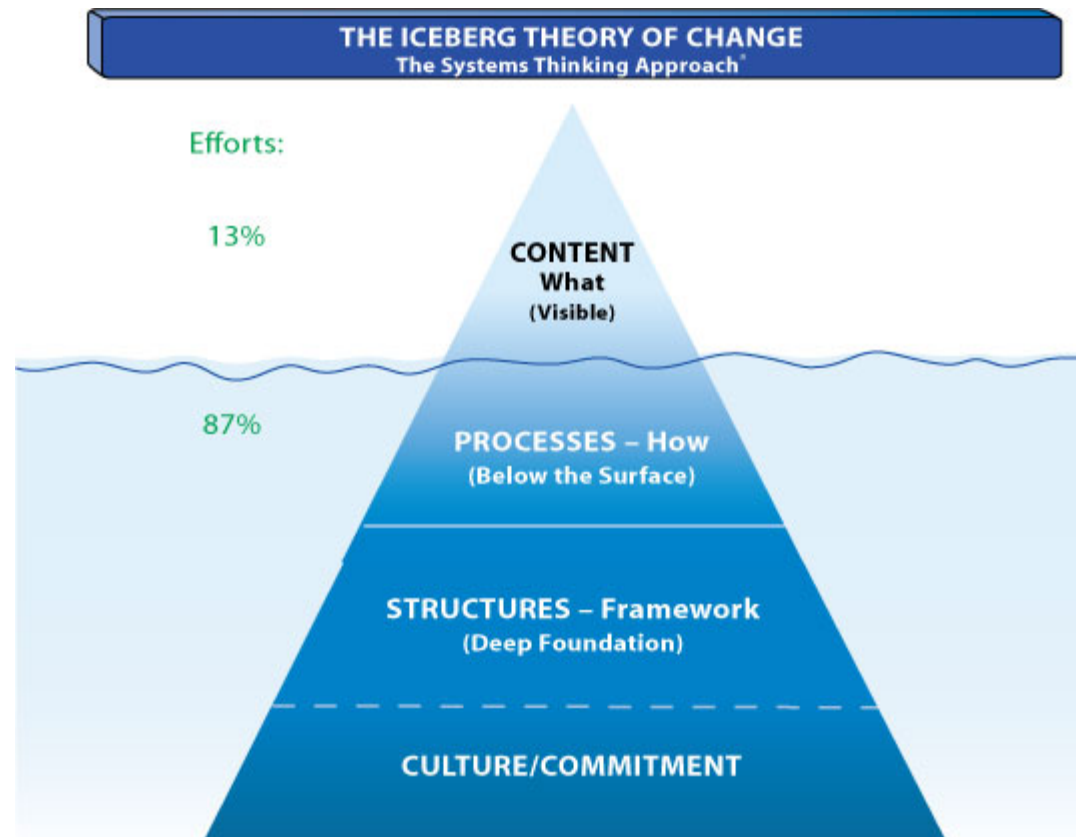
The Resulting Credentials: Education

Level #1: Strategic Planning Professionals (SPP)—requires the Think-Plan-Act and our first two levels of leadership in our BOK (1.1 and 1.2) as well as some level of business acumen.

Level #2: Strategic Management Professionals (SMP)—requires knowledge in our entire BOK (Think-Plan-Act), be a strategic leader, and have more extensive and strategic business acumen.

Strategic Planning Apprentice (SPA) Designation—requires the same knowledge as our SPP above but not the Business Acumen. The SPA is required to pass the SPP BOK examination. Any Business Acumen is a plus.

The Iceberg Theory



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THINK—PLAN—ACT

The Iceberg Theory reflects the natural reality of everyday life. Present in every interpersonal situation in life are three elements: **Content, Processes, and Structure**. Creating high performance organizations requires a balance in how organizations spend their time and energy on these three elements.

CONTENT—ELEMENT #1

Task, goal, and focus of the business are its content—or what the strategic plans and change projects are all about. This is the easiest element to see and understand.

However, below the surface of the water, an iceberg has 87 percent of its mass. So, too, it is with action and change. It is what is not visible and out of balance of missing that will kill successful change—namely, the processes and structures of our interactions.

Content myopia (focusing on content alone) is the failure by leaders to focus on the strategic planning processes and structures. This is naive since action and change are dependent on them both.

PROCESSES—ELEMENT #2

Capabilities involved in our planning interactions are the “how to’s” of behavior while working on our tasks/content above. For example, if bubble gum is the content, chewing is the process by which we extract the juices that make it enjoyable. In other words, chewing is the process and gum is the content. The “process” is how we implement the strategic plan. This is demonstrated by the rollercoaster of change later in this BOK.

This rollercoaster is “natural, normal, and highly predictable”— and all the fundamentals you need to know about the process of change.

STRUCTURES—ELEMENT #3

Infrastructures for thinking—planning—actions and change are the least understood as they are the deepest part of the iceberg and are often taken for granted. We rarely even acknowledge their existence despite the fact that the structures are the context, vessels, or arrangements within which all process and content operate. These are the biggest leverage place for actions and change to occur successfully.

Planning for Change: The Rollercoaster

Strategic Planning is “planning for change” in an entire organization. Hence the other construct needed here—the five levels that exist in any organization:

Level 1: Personal Creditability

Level 2: Interpersonal Relationships

Level 3: Functional Teams

Level 4: Cross-functional Teams

Level 5: Organization-wide

Since strategic planning is “planning for change” that takes action to be different and better than the present state, the Think—Plan—Act process will unleash the Rollercoaster of Change. Life is full of cycles and cycles of change and is the reality of life for us all; not just planners and executives. If you understand the Rollercoaster, then the actions and change are “*natural, normal, and highly predictable.*” This allows the planner and executive to be proactive in successfully executing their strategic plan.

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

Change is an individual, emotional, and psychological matter for each of us. The bigger the organization, the more difficult it is apt to be to get everyone to change and focus on the customer. Instead, the focus may be on oneself. Thus, productivity, quality, and other results take a nose dive. Things will almost always get worse before they get better is a fact!

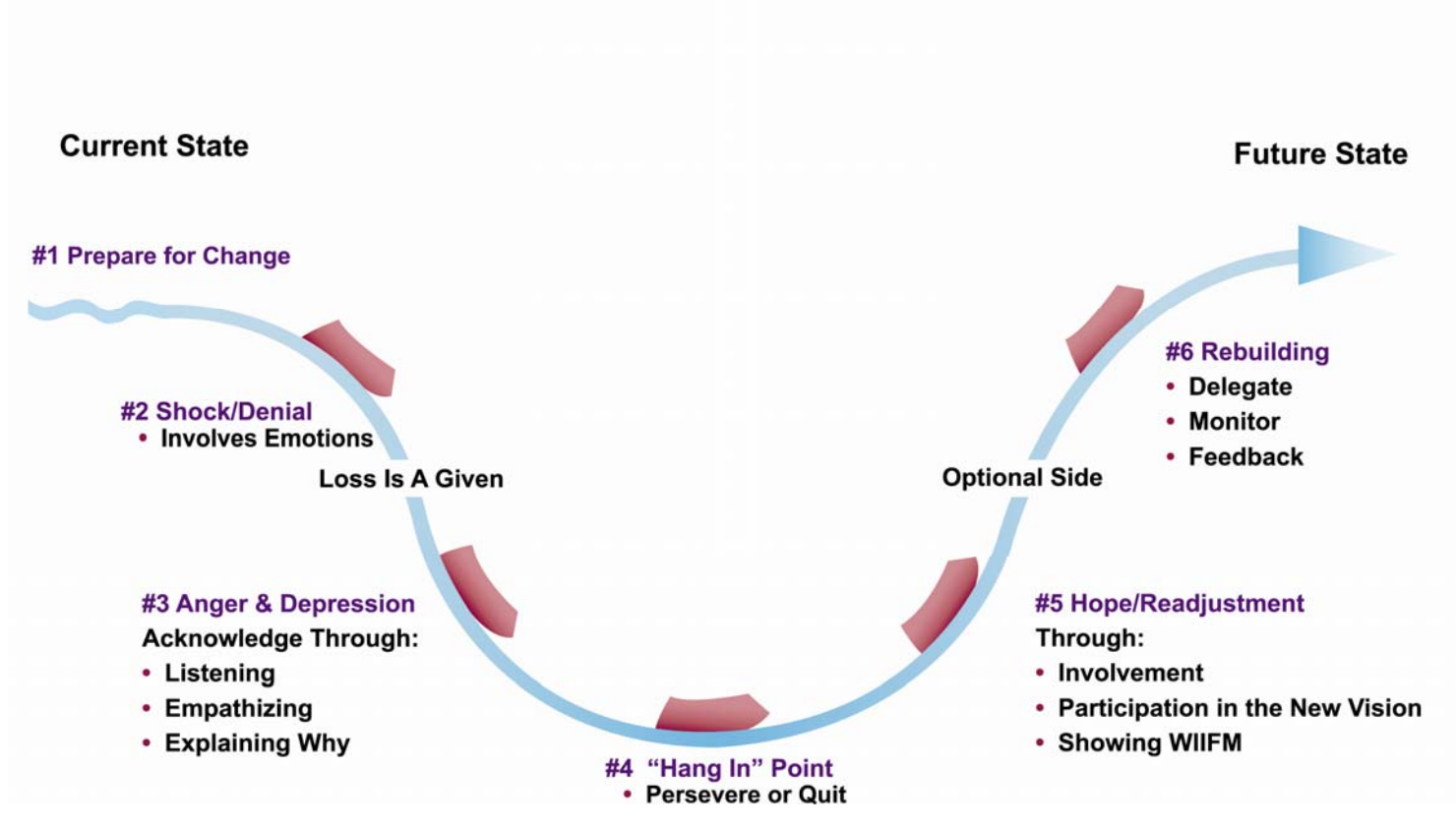
The “Rollercoaster of Change” is a term coined a number of years ago for the phenomenon that occurs and is written about in many fields and disciplines, including mental health (Virginia Satir, William Bridges, Harry Levinson, Stephen Haines, and Ken Blanchard).

This Rollercoaster is a simple way of understanding the dynamics of how to effect successful strategic planning and its implementation (action and change). Cycles of “stability—change—instability—new stability—and change all over again” are normal and natural.

Basically, you must manage and lead yourself first, and only then, help others through the stages of the rollercoaster. Keep in mind, though, that everyone goes through these stages at different rates, depths, and times.

THE ROLLERCOASTER OF CHANGE

This Individual and Psychological Rollercoaster is “Natural – Normal – and Highly Predictable”



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**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

LEAD – LEVEL I					
1.1 Lead in Personal Credibility (Think-Plan-Act)					
Level I					
The Candidate should know and/or understand how to:		(L)ow	(M)ed	(H)igh	Comments
1.1.1	Set goals and opportunities for his/her own lifelong learning and continuing education in the field				
1.1.2	Strive to develop and maintain a balanced life (body-mind-spirit)				
1.1.3	Act with conscious intent by deliberately guiding his/her behavior in accordance with a personal vision and values				
1.1.4	Commit to ethical practices and high professional standards by acting with consistency, honesty, high integrity, and civility in all aspects of life				
1.1.5	Take inventory of themselves by knowing their style, strengths, weaknesses and having flexibility to change as circumstances permit				
1.1.6	Develop a personal vision, goals, and personal strategies for his/her life and career				
1.1.7	Develop personal credibility through having the courage of their convictions to confront dysfunctional behavior				
HIGH TOTALS: /out of 7					

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

1.2 Lead in Interpersonal Relationships (Think-Plan-Act)						
Level I						
The candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments	
1.2.1	Show empathy, caring and respect by respecting the feelings, emotions, and perspectives of others					
1.2.2	Communicate effectively and actively through active listening, questioning others and giving and receiving honest and effective feedback					
1.2.3	Mentor and coach others by helping them be accountable and achieve better results					
1.2.4	Manage conflict by influencing and persuading others and myself towards a "win-win" solution					
1.2.5	Be innovative and creative in strategic thinking; strategic and annual planning; and strategic implementing of change as well as continuous improvement. Support creativity in others					
1.2.6	Build and adhere to a reputation for integrity, ethical behavior, and fairness to others					
1.2.7	Facilitate better problem-solving and decision-making between individuals, seeking consensus where possible, yet not allowing compromises on strategic direction					
1.2.8	Seek and act upon constructive feedback from others to further their personal growth and development					
1.2.9	Give critical, yet constructive feedback to others, including executives					
HIGH TOTALS:					/out of 9	

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

2. THINK—Level I						
2.1 Think Content—Level I						
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments	
2.1.1	Design a future global environmental scanning system and process utilizing accepted methodologies for today’s global competition					
2.1.2	Ensure that enterprise-wide risk management , scenario planning, portfolio analysis, and futuring are part of the strategic planning process					
2.1.3	Support full economic and portfolio analysis of tentative/alternative strategic directions to ensure their viability, growth, and sustainability					
2.1.4	Assist senior management with industry and organizational structural analysis in search of a better business model					
2.1.5	Gather customer satisfaction information and intelligence, especially regarding their wants, needs, loyalty, and retention					
2.1.6	Offer a full range of organizational growth strategies ; from organic to development, to mergers/acquisitions, to strategic alliances, etc					
2.1.7	Assist the collective management team in developing and using a common framework and language to become a strategy-oriented organization attuned to the frequency of the business’ dynamic nature and processes					
2.1.8	Provide benchmarking and best practices research on what works or does not work					
2.1.9	Focus the organization on strategic goals and measurements for its short and long term success					
HIGH TOTALS:					/out of 9	

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

2.2 Think Processes – Level I					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
2.2.1	Promote ethical considerations as part of the strategic thinking process				
2.2.2	Draw quiet people out safely and ensure open and frank communications in strategic thinking sessions				
2.2.3	Lead virtual teams to openly discuss strategic thinking topics				
2.2.4	Foster a culture of creativity and innovation as part of the strategic thinking process				
2.2.5	Focus on keeping things simple (simplicity wins the game every time) as it is a way to make an organization more strategic, and yet faster and cheaper				
2.2.6	Guide near term trend and competitive/industry analysis to be able to strategize in dynamic and evolving global markets				
2.2.7	Utilize proactive pre-work and pre-meetings to tailor and sequence the organization’s Think—Plan—Act framework to ensure senior and middle management all understand and use the same process				
HIGH TOTALS:					/out of 7

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

2.3 Think Infrastructures—Level I					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
2.3.1	Provide the necessary and specific holistic strategic thinking framework to ensure better strategic decision-making				
2.3.2	Provide the needed strategic thinking infrastructure to keep it separate from the day-to-day tactical and pressured world of business				
2.3.3	Organize meetings with a single agenda on difficult and chronic strategic issues affecting the organization				
2.3.4	Involve a broader array of middle management and others in the strategic thinking process as a learning experience while ensuring there is no “dumbing down” result				
HIGH TOTALS:					/out of 4

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

3. Plan					
3.1 Plan Content—Level I					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
3.1.1	Guide the design and implementation of a good corporate strategic plan and understand best practices as to why good ones work and bad ones do not work				
3.1.2	Advise on identification and evaluation of different options to grow the top line (Sales/Revenues)				
3.1.3	Advise on different methods to lower costs , increase profit margins, and improve cash flow and the balance sheet				
3.1.4	Conduct a future environmental scan and ensure it is global in scope to capture the worldwide dynamic trends of strategic significance				
3.1.5	Use quantitative tools to conduct decision analysis , modeling, and risk management to support executive decision-making				
3.1.6	Explain the concepts and principles of the premier theorists and practitioners in the field of strategic planning, both in history and the current field of planning, including the major schools of strategy as well as the newer emerging ones such as Balanced Scorecard, Blue Ocean Strategy, the Knowledge Economy, The Systems Thinking Approach, etc				
3.1.7	Leverage, align, and cascade the corporate direction into three-year business plans for all strategic business units and major functional				
3.1.8	Use goal setting and metrics extensively with targeted goals to track and measure “smart” outcomes				
3.1.9	Articulate the importance of the organization’s distinctive core competencies and strategies that result in a competitive advantage vs. MOS (more of the same)				
3.1.10	Assess the degree to which the corporate culture will obstruct or enable implementation of the strategic plan and adjust accordingly				
HIGH TOTALS: /out of 10					

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

3.2 Plan Processes—Level I					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
3.2.1	Integrate, communicate, and cascade all the strategic planning components into an Annual Planning and Budgeting process across and down the entire organization				
3.2.2	Identify and explain at least two of the different methodologies for strategic planning that follow the Think—Plan—Act process				
3.2.3	Conduct an effective current state assessment (such as a SWOT analysis), including status of the organization with respect to its competitors				
3.2.4	Understanding the strategic planning process that starts with the desired outcomes such as the ideal future vision, mission, core values, and desired competitive advantage/positioning to set a future direction for the organization				
3.2.5	Understand how to use scenario planning and modeling to anticipate and make sense of changes happening in the world and their impact on the organization				
3.2.6	Support, communicate, and audit the organization’s core values				
3.2.7	Facilitate formulation of the vision and mission statements to be clear in defining “why the organization exists” (its purpose) including who its future customers/clients are and what products and services it will provide them				
3.2.8	Provide an annual department planning process that is in a line of sight linked to the corporate strategic plan				
3.2.9	Articulate numerous ways to involve all key internal and external stakeholders to the process; since people are willing to change when they are involved; not when it is imposed on them				
HIGH TOTALS:					/out of 9

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

3.3 Plan Infrastructures—Level I					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
3.3.1	Guide relevant research and required data collection required in a timely fashion				
3.3.2	Utilize online and computer technologies to facilitate and speed the strategic planning process				
3.3.3	Designate a corporate “ support team and functional cadre ” to ensure that the knowledge, timing, outcomes, processes and infrastructures of planning and strategic management achieve the corporate-wide integration and leverage they require to ensure business success				
3.3.4	Implement an annual strategic planning review and update system to ensure the continued improvement of the strategic planning process				
3.3.5	Assist the organization in keeping simple, clear, and well understood language and terminology of the entire strategic management system				
3.3.6	Work towards continuously evolving continuous improvement processes that are in synch with rapidly changing global systems and events				
HIGH TOTALS:					/out of 6

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

4. Act—Level I					
4.1 Action Content—Level I					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
4.1.1	Leverage the fact that “ people support what they help create ” in supporting change across the entire organization				
4.1.2	Ensure teamwork and project management skills are taught to those in the organization needing to effectively implement strategic plan projects and initiatives				
4.1.3	Take into account the importance of the organization’s culture when planning/implementing organizational change				
4.1.4	Break down long-term strategic plans into annual and project plans				
4.1.5	Keep the organization abreast of new emerging theories and methods of creating customer value, including listening to and involving customers to create such value				
4.1.6	Ensure the application of quality management and customer service best practices in support of the organization’s strategic direction and core values				
HIGH TOTALS:					/out of 6

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

4.2 Action Processes—Level I					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
4.2.1	Foster ongoing communications processes and involvement of all key internal and external stakeholders so they “buy-in” and “stay-in” over time with the new strategic direction				
4.2.2	Set up a monitoring and accountability process and information systems to track key success factors—“smart” goals and implementation of the change				
4.2.3	Review progress and coordinate the modification of the implementation plan as needed				
4.2.4	Provide mechanisms, including lessons learned , that ensure the process is improved over time				
4.2.5	Serve as the trusted advisor to project teams and continuous improvement teams as they implement the strategic initiatives throughout the year				
HIGH TOTALS:					/out of 5

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

4.3 Action Infrastructures—Level I					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
4.3.1	Identify and engage the key stakeholders that will drive the change and the best practice structures				
4.3.2	Work with the CEO and CFO to ensure that adequate funding and resources for the required change initiatives and infrastructures are in place				
4.3.3	Guide the development of regular change leadership teams at all unit levels as appropriate				
4.3.4	Establish an effective portfolio management system to support the strategic plan initiatives and projects				
4.3.5	Assist senior management in developing and executing an annual implementation schedule (corporate yearly calendar)				
4.3.6	Convey the concept that an organization is a system wherein all components of the system are interrelated				
4.3.7	Support ideas to ensure employee engagement and attunement of their hearts and minds in support of the strategic direction				
HIGH TOTALS: /out of 7					

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

5.1 Strategic Planning Professional Roles—Level I					
The Candidate should know and/or understand how to		(L)ow	(M)ed	(H)igh	Comments
5.1.1	Define the role of the Strategic Planning & Strategic Management Professionals in Strategic Planning (Lead-Think-Plan-Act)				
5.1.2	Explain the roles of the key others the Strategic Planning Professionals and Strategic Management Professionals will interact with, including the Board of Directors, CEO, Sr. Management Team, Line Managers and SBUs				
5.1.3	Explain the terminology, definitions and framework of the different components of the field of Strategic Planning (Lead-Think-Plan-Act)				
5.1.4	Ensure the clarity, roles and relationships of Strategic Planning Professionals and Strategic Management Professionals and their internal and external clients				
5.1.5	Ensure the keys to engineer success “up front” are met in successful strategic planning and implementation				
HIGH TOTALS:					/out of 5

**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

SUMMARY				
		# of Highs	Out of	Total Percentage
1.1	Lead in Personal Creditability (Think-Plan-Act)	/	possible 7 =	%
1.2	Lead in Interpersonal Relationships (Think-Plan-Act)	/	possible 9 =	%
2.1	Think Content—Level I	/	possible 9 =	%
2.2	Think Processes—Level I	/	possible 7 =	%
2.3	Think Infrastructures – Level I	/	possible 4 =	%
3.1	Plan Content—Level I	/	possible 10 =	%
3.2	Plan Processes—Level I	/	possible 9 =	%
3.3	Plan Infrastructures—Level I	/	possible 6 =	%
4.1	Action Content—Level I	/	possible 6 =	%
4.2	Action Processes—Level I	/	possible 5 =	%
4.3	Action Infrastructures—Level I	/	possible 7 =	%
5.1	Strategic Planning Professional Roles – Level I	/	possible 5 =	%
Grand Total:		/	possible 84 =	%

ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

**Acknowledgment of Participation -
For
The ASP Certification Project: 2008-2009**

The Association of Strategic Planning (ASP) would like to acknowledge its gratitude and “Thank You” for the individuals, teams and organizations participating and supporting the development of our ASP Certification Program, especially including the following:

I. Sponsors for the ASP National Standards and Certification Program include:

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RECOMMENDED BIBLIOGRAPHY FOR EXAM PREPARATION:

(Depending on your needed areas of improvement)

Current Literature

- Strategic Leadership
- Strategic Thinking
- Strategic Planning
- Strategic Action and Change

Classic Literature

Three Recommended Simple Steps To Taking Your Exam

1. Do a self-assessment versus the Body of Knowledge for your desired Strategic Management Professional, Strategic Planning Professional, or Strategic Planning Apprentice Exam.
2. Based on your self-assessment and your strengths and weaknesses, we recommend:
 - a. Reading books from the attached list that eliminate your weaknesses
 - b. Attending Qualified Registered Educational Providers (REPs) courses listed on the Association for Strategic Planning's website to eliminate your weaknesses as well.
3. Apply for, be approved, take your exam, and become certified.



ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT

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**ASSOCIATION FOR STRATEGIC PLANNING CERTIFICATION PROGRAM
THINK—PLAN—ACT**

ASP Body of Knowledge Statements Summary

Level I			Level II		
Point		# of Statements	Point		# of Statements
LEAD – 15% (24 questions)			LEAD – 25% (40 questions)		
1.1	Lead in Personal Credibility	7	1.3	Strategic Leader	6
1.2	Lead in Interpersonal Relationships	9	1.4	Cross-Functional Strategic Leader	6
			1.5	Organization-wide Strategic Leader	10
THINK – 25% (40 questions)			THINK – 15% (24 questions)		
2.1	Think Content	9	2.4	Strategic Thinking Content	6
2.2	Think Processes	7	2.5	Strategic Thinking Processes	7
2.3	Think Infrastructures	4	2.6	Strategic Thinking Infrastructures	2
PLAN – 25% (40 questions)			PLAN – 25% (40 questions)		
3.1	Plan Content	10	3.4	Strategic Planning Content	9
3.2	Plan Processes	9	3.5	Strategic Planning Processes	5
3.3	Plan Infrastructures	6	3.6	Strategic Planning Infrastructures	6
ACT – 25% (40 questions)			ACT – 25% (40 questions)		
4.1	Action Content	6	4.4	Strategic Action Content	7
4.2	Action Processes	5	4.5	Strategic Action Processes	6
4.3	Action Infrastructures	7	4.6	Strategic Action Infrastructures	5
ROLES – 10% (16 questions)			ROLES – 10% (16 questions)		
5.1	Strategic Planning Professional Roles	5	5.2	Strategic Management Professional Roles	5
Total	160 questions	84	Total	160 questions	80