

STARTING SOON!

Haines Centre for Strategic Management

**Making Sense of BOK 3.0
– Using Systems Thinking**

*Please mute your microphone and
Introduce yourself in the chat*

Haines Centre for Strategic Management

**Making Sense of BOK 3.0
– Using Systems Thinking**

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Global Partner, Canada*

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Global Partner, Singapore*

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Your facilitators



- IASP Pioneer
 - SMP, Calgary, Canada
 - Taught original exam prep course
-
- IASP Member, Brisbane, Australia
 - Innovation and impact evaluation expert
 - Brisbane Australia



Your facilitators



- Experienced strategic management consultant & coach
- Singapore

- Specialist in strategic planning and risk assessment
- Brisbane, Australia



Objectives



- Solidify your understand of Systems Thinking
- Apply The Systems Thinking Approach[®] to BOK 3.0
- Apply The Systems Thinking Approach[®] to passing the SPP and SMP exams



Thinking differently



***“Problems that are created
by our current level of thinking
can't be solved by that same level of thinking.”***

- Albert Einstein



Science of living systems



Systems can only be understood & defined in the context of the higher level system or environment in which it exists.

Systems are made up of a group of inter-related components that work together in support of the objectives of the whole

If there is no relationship between the components, there is no system

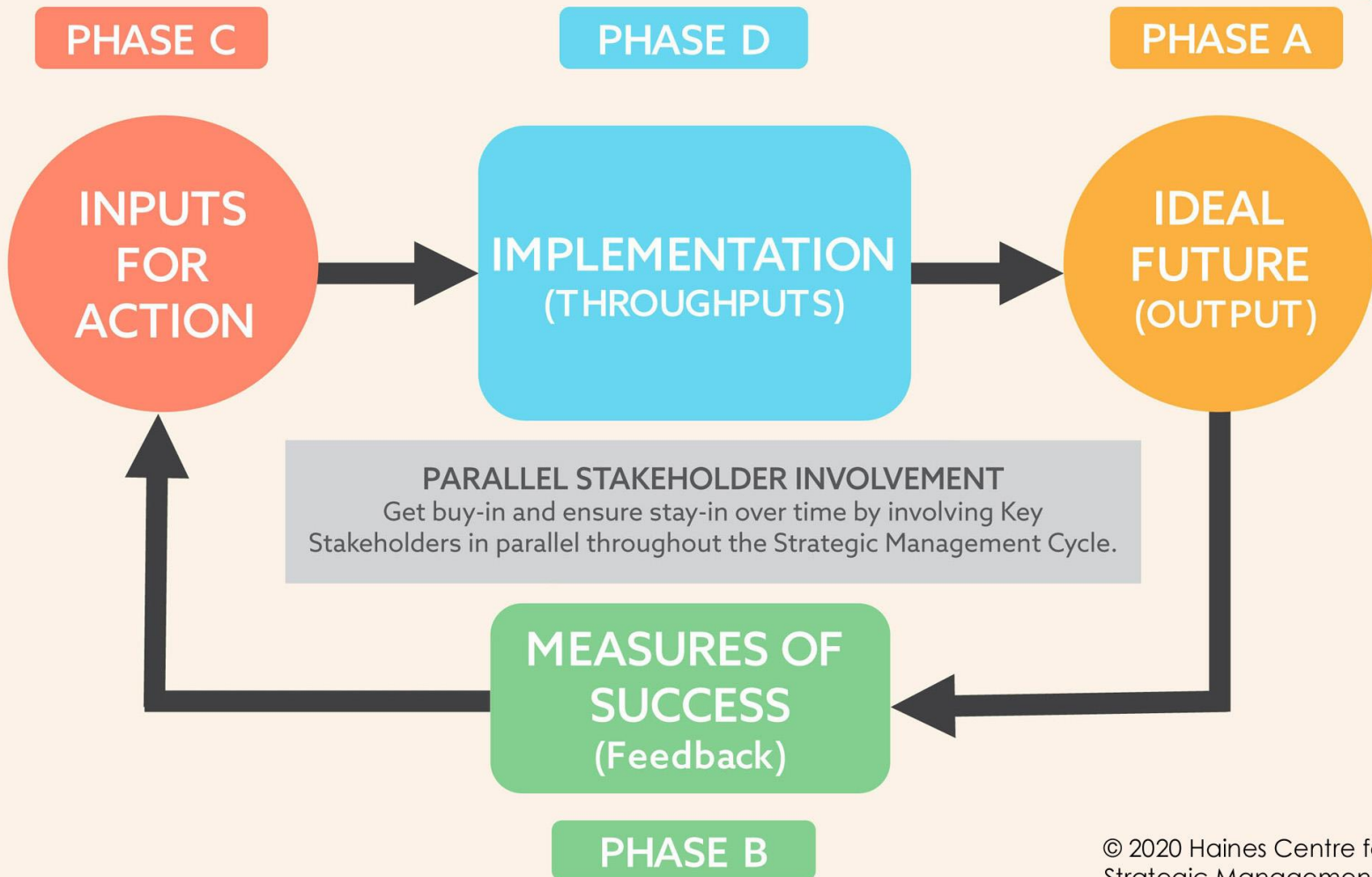


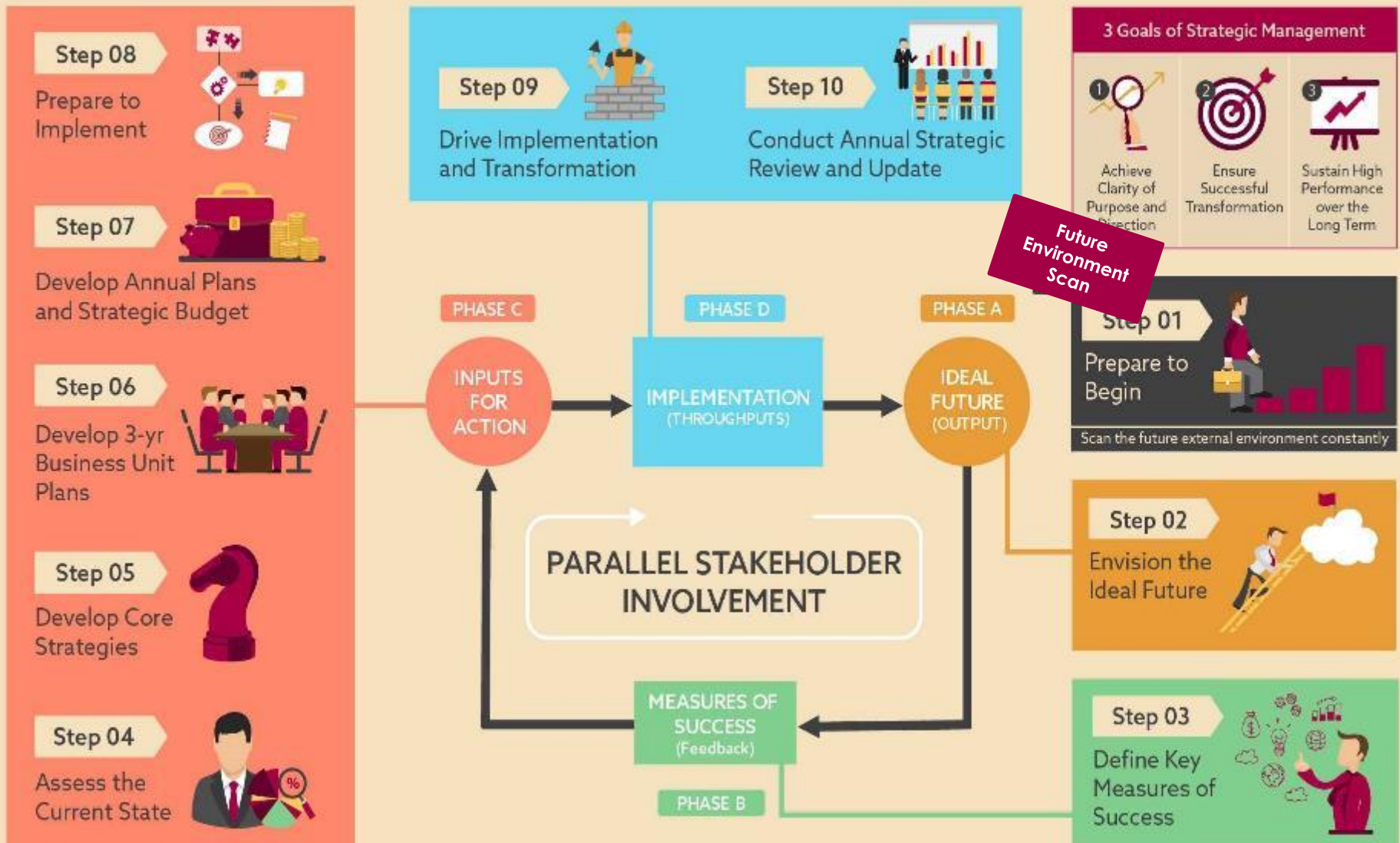
The Systems Thinking Approach®



THE SYSTEMS THINKING APPROACH 5 KEY PHASES

E. External Environment





The Systems Thinking Approach®



Five Strategic Thinking Questions – In Sequence:

PHASE A: Where do we want to be?

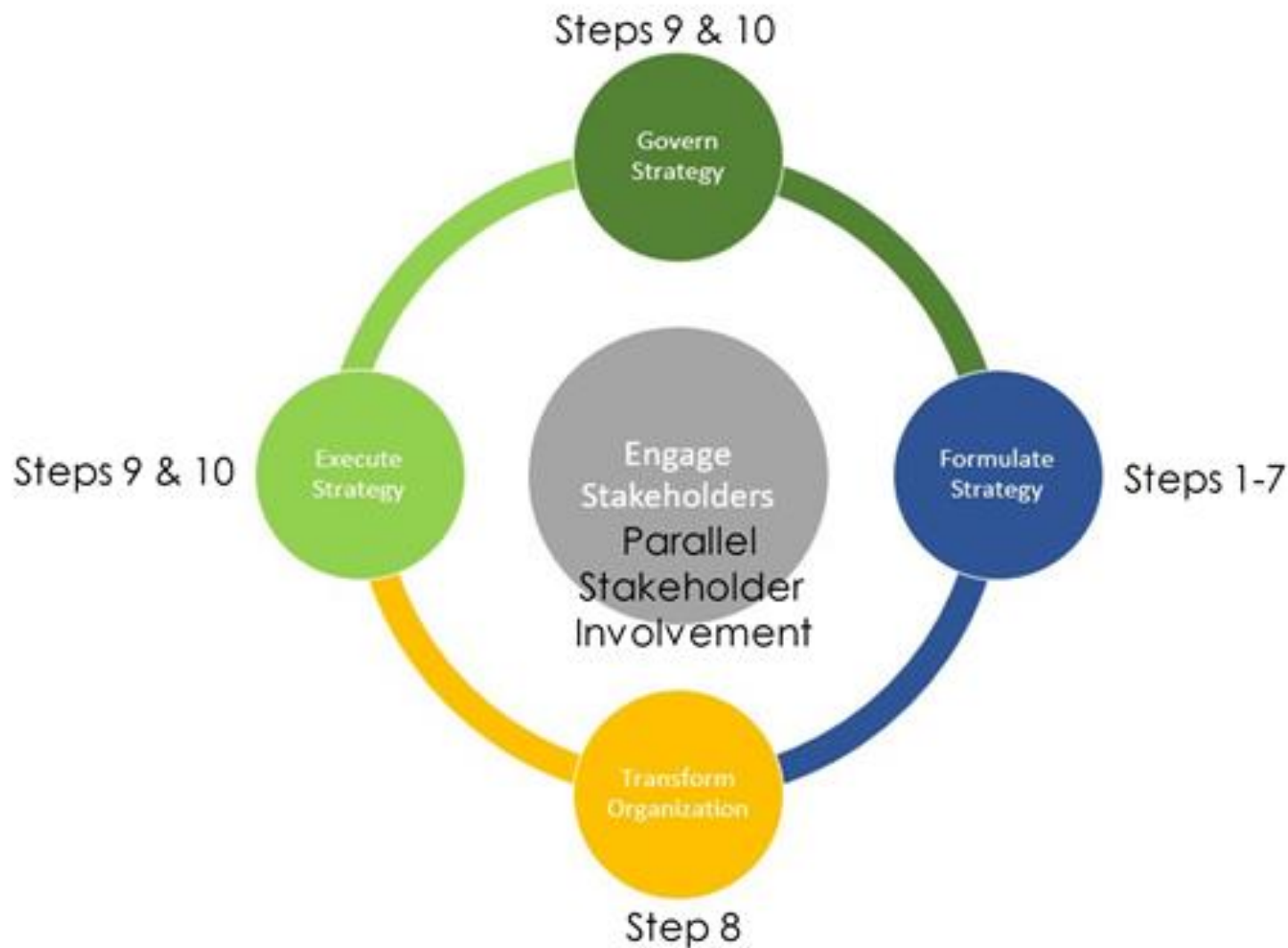
PHASE B: How will we know when we get there?

PHASE C: What are our inputs for action?

PHASE D: How do we get there?

PHASE E: *Ongoing:* What will/may change in your environment in the future?

Relationship between Domains & Our Strategic Management model



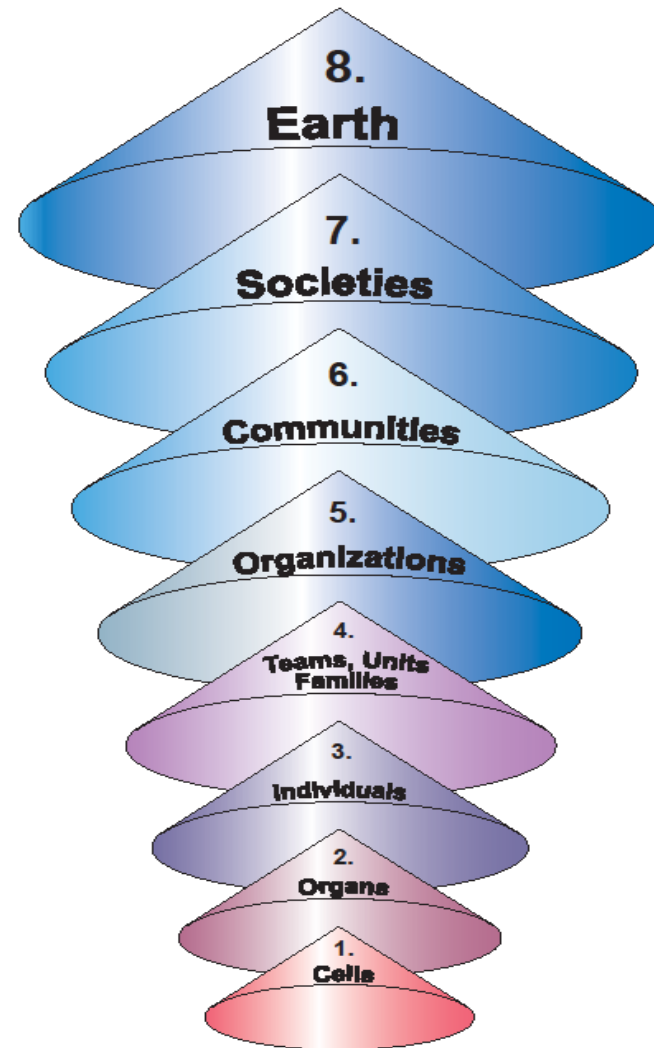
Eight levels of living (open) systems



Boundaries and nested, inter-connectedness:

- Nothing exists in isolation
- Relationships are everything

“Problems that are created by our current level of thinking can't be solved by that same level of thinking.”

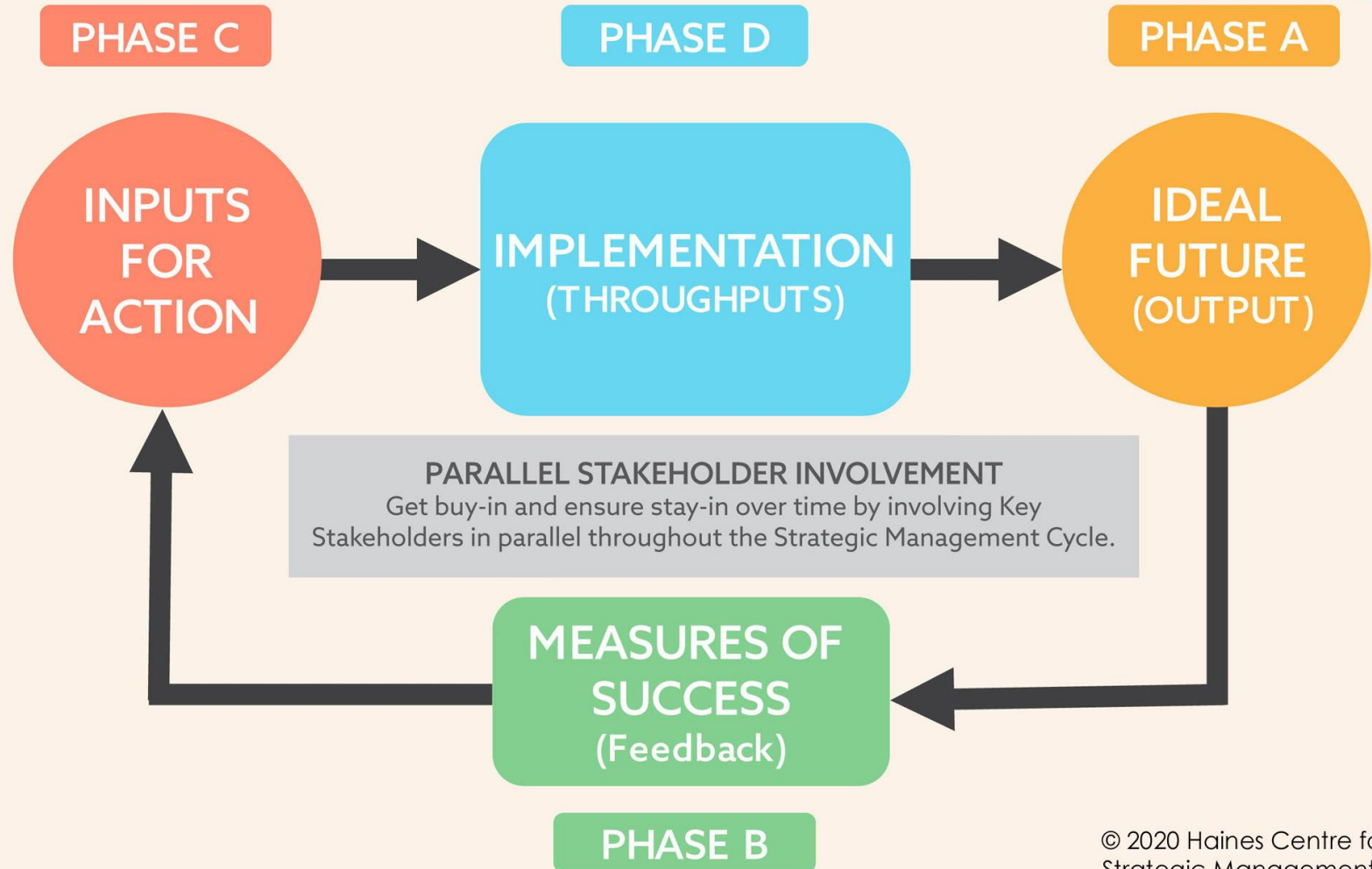


The Systems Thinking Approach®



THE SYSTEMS THINKING APPROACH 5 KEY PHASES

E. External Environment



Future Environmental Scanning (SKEPTIC)



What are the 5-10 environmental trends – projections – opportunities – threats facing you over the life of your Plan?

S Socio-Demographics (People/Society)

K Competition / Substitutes:

E Economics:

E Ecology:

P Political / Regulatory:

T Technical:

I Industry / Suppliers:

C Customer / Citizens:

Future Environmental Scanning Example



SKEPTIC WORKSHEET Future Environmental Scanning Trends

Peter Zeihan
analysis

List the 5-10 Future External Environmental Trends—Projections your organization faces over the life of its Strategic Plan:
Implications for your organization today | Opportunities and Threats come next (Backwards Thinking)

S Socio-Demographics (People and Society)

- Boomers have left the workforce**
- Labor supply gaps & investment capital withdrawn from markets**
- Housing affordability crisis**
- Exacerbating the employment gap because no where to live in regional locations**
- Migrants migrate - in one of migration and not of assimilation**
- Concern about the future and willingness to "tough it out"**
- More entrepreneurial and not supporting the myth of "hustle-cult"**
- Been disappointed in their materialistic "hustle-cult" and "entrepreneur" using the VC/PE network affect to support them.**
- THE CORPORATE EMBRACE OF ESG - corporate social responsibility**
- First nations opportunity to meet to lead the project because the government has abandoned the industries**
- Different cultures have different work ethics**
- The reality of the working class reaching retirement age in next decade**
- Need to put serious consideration with governments, international treaties**
- One "big game" that QM has in 2032 (Enclave game?)**

K Competition and Substitutes

- FIFO supply of labour becoming a critical supply chain for labor**
- More meaning of labour supply that was not previously considered and several trends becoming a critical CEO concern**
- Education financing opportunity to support nations to healthy and economic stability in the coming decades than traditional education**

E Economics

- Breakdown in global supply chains because of the pandemic**
- Concern about ability to be food/energy secure in the event of future crisis**
- Lighting & weathering more ability to be food/energy secure in the event of future crisis**
- No return to the office and now stay working from home**
- Impact on the value of CEO real estate and the collaboration of teams**
- Work with real estate business RBTs for alternative financing and repositioning assets**
- Work in person F2F facilitation and "revived" in the client organisation**
- Changing centers of influence in currency, trade and the removal of the gold standard**
- This means that the Saudis now want to trade in RMB and not US \$**

E Ecology

P Political and Regulatory

- Globalisation is over and isolation is back - this also has "anti-colonial" overtones**
- This means that the specialisation due to economic integration has revealed vulnerabilities in local supply chains (e.g food & energy security)**
- The middle ground is regionalisation of supply chains for food & energy security**
- Geopolitics will be "crazy" for the foreseeable future**
- Our clients have to plan within this heightened global uncertainty**
- Systemic risk needs to be integrated into strategic planning**

T Technology

- Work & services are now on line**
- Help individuals to start down obligation to be in the office and the demand for flexibility for quality of life**
- Remote work start down obligation to be in the office and the demand for flexibility for quality of life**
- Help individuals to clarify what is the right balance for them by redefining their vision, values and purpose**
- Productivity management of a geographically diverse workforce maybe using agile management tools**
- The popularity of just in time (JIT) micro learning borne from the tech industry**
- Modulaised Bite sized learning for the HCM programs**
- Augmented reality for facilitation**
- There are immense opportunities for us to leverage a workforce that digital marketing/learning platforms are more important than ever before**
- Open to augmenting our practice with the technology that emerges over time (e.g. good cost)**
- Bite sized learning**

I Industry and Suppliers

- Superannuation funds being a significant source of corporate capital**
- Impact investment mindset in Government, Philanthropy and research**
- Policy, Strategy & impact evaluation services**
- Pragmatic effect on investment in student All without on-line AI/ML consultant that compete with us to build out and leverage their university resources**
- People are still coming together for management retreats**
- There is a market there for this sort of work**
- The dream is the Bali/Fiscian villa for management retreats**
- Strategy meeting is the best "team building" exercises there are....**
- Our product is the experience in addition to the strategy**

C Customer and Citizens

- The is demand for sustainable investment based on ESG principles**
- Greater demand for strategy revamps including ESG**
- Clients are very happy with the hybrid facilitation online as good as F2F in many cases it is more flexible than F2F**
- Could mean that traditional facilitation (and F2F) are not a competitive advantage relative to good "tech" skills**
- We are niche and we don't accept mixed groups (either all or all of F2F)**
- Clients seem to be happy to pay the same price for online delivery as they would have paid for F2F**
- This could mean that digital marketing/learning platforms are more important than ever before**
- Investigate a shared platform for teaching, LMS applications**
- Business strategy plan management software platforms - all. The demand provided by "the Boss" may be a single client to list a number of problems businesses are asking for. We need to substitute writing into templates. Have our talk with ABRS may help us to get call back for annual review**
- Spirituality is on an upswing trend**
- So vision, values & purpose are now more than ever before - people are wishing and manifesting for the future**
- Is envisioning a mass market offering? Part of the coaching offering?**

E - Future Environmental Scanning



- New tools will be developed and adopted from other disciplines
- Needs will continue to change in organizations
- Stakeholders will become more involved in a holistic planning approach
- We will grow our membership and they will come from both existing & new sectors
- Members will want more e-tools

A - Ideal future



- Propose a holistic approach to strategy management that explores the strategy life cycle and the set of interconnected and overlapping concepts, activities, and tools essential to successfully achieving desired strategic results.
- Serve as a key resource for those preparing to take IASP certification exams



B - Key success measures



- Feedback from members on usefulness of BOK in their work
- Feedback from members on amount of help in passing certification exams



C - Inputs for Action



- Volunteer driven document
- Cost considerable time to create and keep updated
- Hard to understand for studying for exams
- Unsure of how closely linked BOK is to exams
- Key resource for members
- Strongly linked to Ideal Future Vision
- Broad and comprehensive for all members' use
- Has many tools and options
- Uses ideas and tools from other disciplines
- Not seen as ever complete
- Assess your strengths & weaknesses related to the BOK 3.0

D - Implementation



- One document to meet needs of members for their work: holistic approach to strategy management with options and tools; and a resource for exam preparation
- Divided into five sections for the functions that the organization must continuously and simultaneously perform to be successful:

- Formulate Strategy
- Transform Organization
- Execute Strategy
- Engage Stakeholders
- Govern Strategy

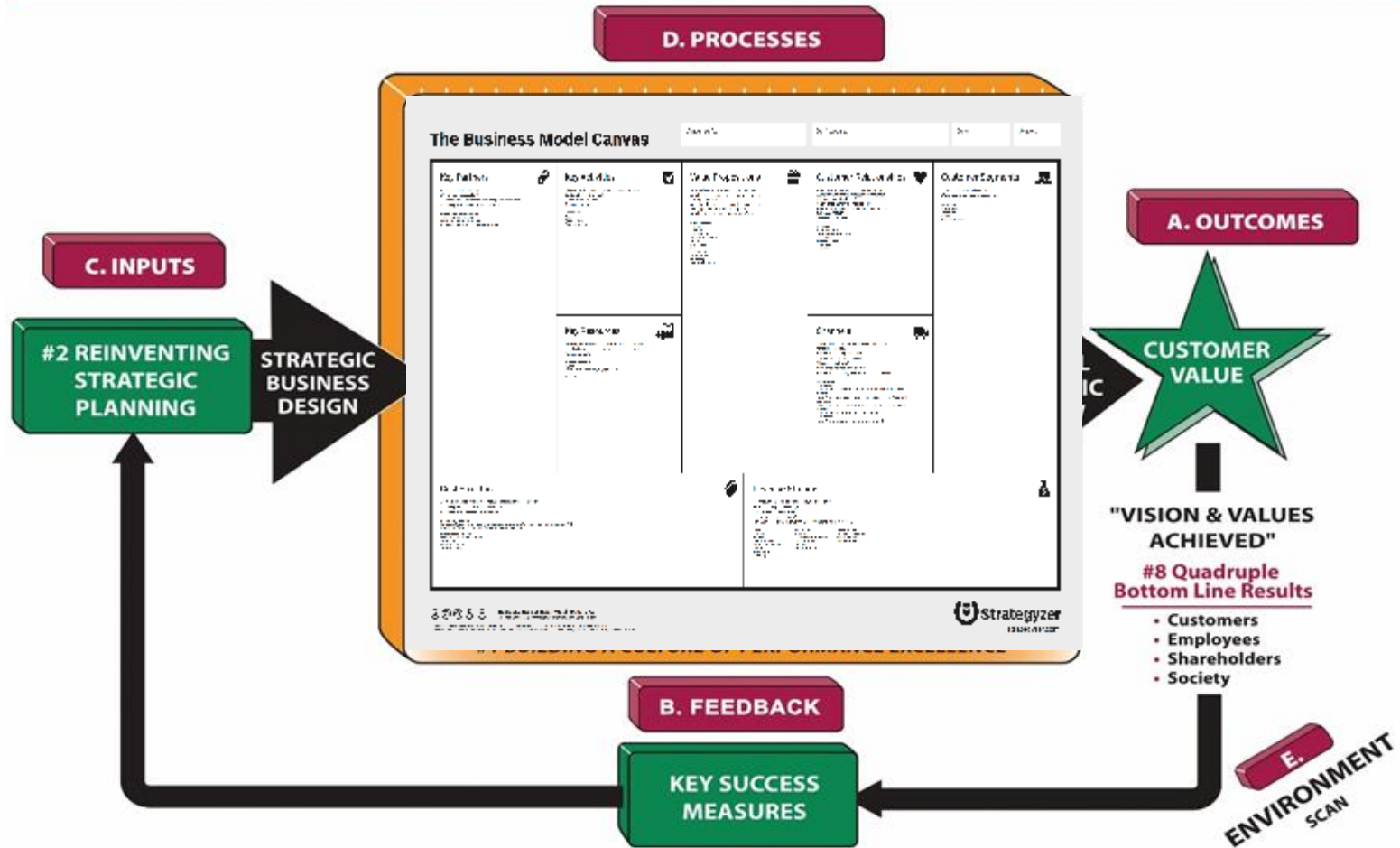


- Each section consists of (1) key concepts and definitions; (2) key activities; and (3) tools (including approaches, methods, techniques)

BRINGING IT ALL TOGETHER



THE ORGANIZATION AS A SYSTEM



The Systems Thinking Approach®



THE SYSTEMS THINKING APPROACH 5 KEY PHASES

E. External Environment

PHASE C

PHASE D

PHASE A

INPUTS
FOR
ACTION

IMPLEMENTATION
(THROUGHPUTS)

IDEAL
FUTURE
(OUTPUT)

PARALLEL STAKEHOLDER INVOLVEMENT
Get buy-in and ensure stay-in over time by involving Key Stakeholders in parallel throughout the Strategic Management Cycle.

MEASURES OF
SUCCESS
(Feedback)

PHASE B

C - Inputs for Action

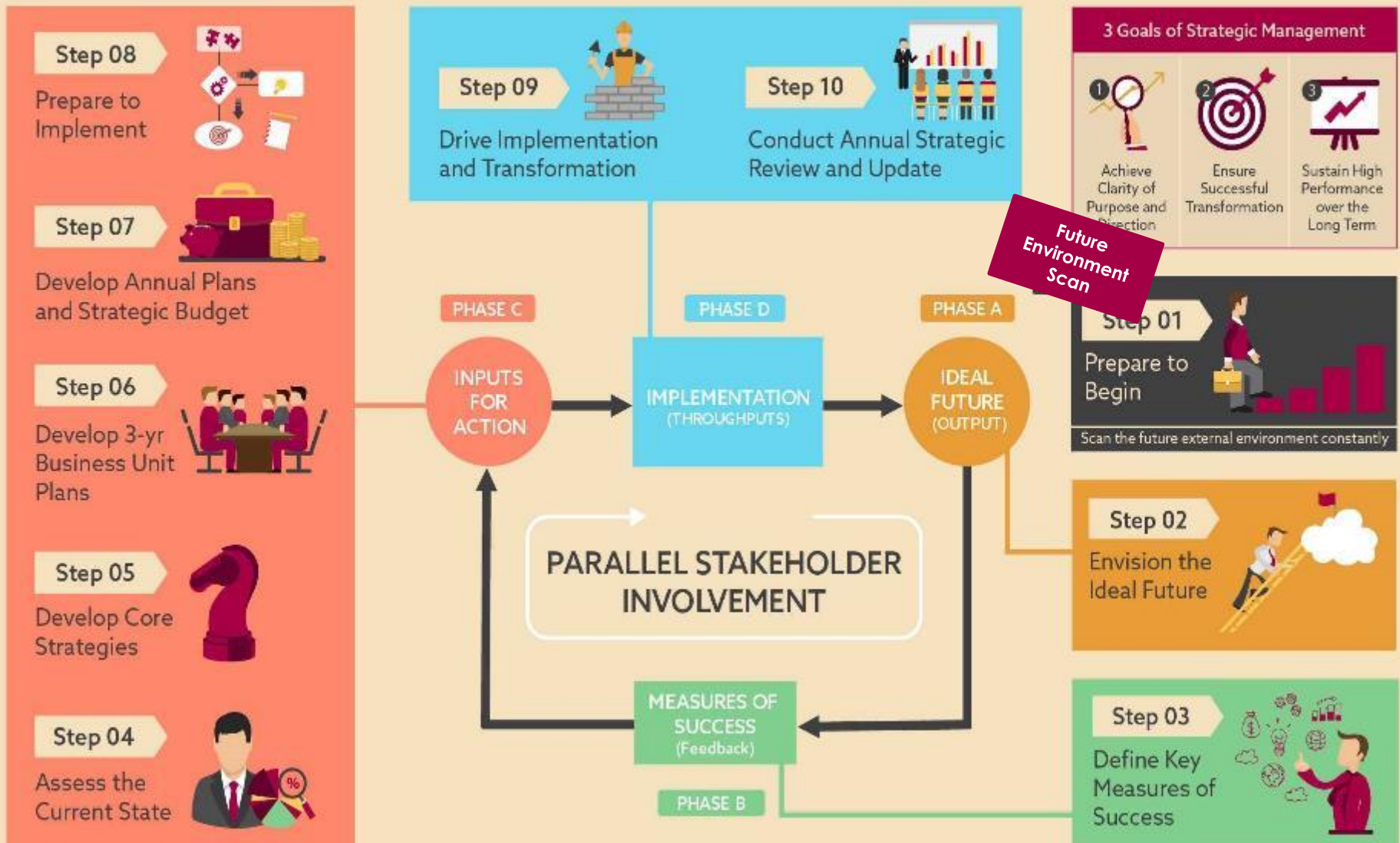


- BOK 3.0 Volunteer driven document
- Hard to understand for studying for exams
- Unsure of how closely linked BOK is to exams
- Broad and comprehensive for all members' use
- Has many tools and options
- Uses ideas and tools from other disciplines
- Not seen as ever complete
- Not enough time to study
- Courses & books available to help you study
- Other people writing the exam
- Good support from family and work

D - Implementation



- Review BOK and highlight what you think will be on the exam and study here
 - Don't get into tools in detail, review at a high level to understand what they are supposed to do only
 - Concentrate on the role of the strategic professional, if they aren't involved much in an area in the BOK then I wouldn't study it much
 - Remember that volunteers are setting the exam so look at bulleted lists, that's a great place for volunteers to create questions
 - Review definitions
 - What is possible to ask questions about
- Investigate courses and resources to help you
- Create a study group
 - Discuss what you think will be on the exam
 - Teach each other the important parts in sections assigned to you
 - Create possible exam questions to test yourself and others



Relationship between Domains & Our Strategic Management model



Transform Organization
Step 8

Govern Strategy

Steps 9 & 10

Execute Strategy

Steps 9 & 10



Formulate Strategy
Steps 1-7

Fitting activities & tools to 10 steps



Step 1: PREPARE TO BEGIN

BOK Key Activities

2.2.1.
6.2.1, 6.2.4

BOK Tools

2.3.2, 2.3.3, 2.3.4, 2.3.5
2.3.7, 2.3.8, 2.3.9, 2.3.10, 2.3.11
2.3.18, 2.3.20, 2.3.21, 2.3.22,
2.3.23, 2.3.24,
5.3.10
6.3.2, (17)

Step 2: ENVISION THE IDEAL FUTURE

BOK Key Activities

2.2.3

BOK Tools

(0)

Step 3: DEFINE KEY MEASURES OF SUCCESS

BOK Key Activities

BOK Tools

2.3.50
6.3.3, 6.3.5
(3)



Step 4: ASSESS THE CURRENT STATE

BOK Key Activities

2.2.2.

BOK Tools

2.3.12, 2.3.13, 2.3.14, 2.3.15
2.3.16, 2.3.17, 2.3.19, 2.3.25,
2.3.26, 2.3.27, 2.3.28, 2.3.29,
2.3.30, 2.3.31, 2.3.32, 2.3.33,
2.3.34, 2.3.35, 2.3.36, 2.3.49
3.3.1, 3.3.5, 3.3.8, 3.3.8,
4.3.8, 4.3.9, 4.3.10, 4.3.11,
4.3.12, (29)

Step 5: DEVELOP CORE STRATEGIES

BOK Key Activities

2.2.4,
3.2.1

BOK Tools

2.3.1, 2.3.6, 2.3.37, 2.3.38,
2.3.39, 2.3.40, 2.3.41, 2.3.42,
2.3.43, 2.3.44, 2.3.45, 2.3.46,
2.3.47, 2.3.48, 2.3.51
3.2.1, 3.3.2, 3.3.3, 3.3.4, 3.3.10,
3.3.11,
4.3.1, 4.3.2, 4.3.3, 4.3.4, 4.3.5,
4.3.6, 4.3.7, 4.3.10, 4.3.11
6.3.6, 6.3.8, 6.3.10, 6.3.11,
6.3.12, 6.3.13, (36)



Step 6: DEVELOP 3-YR BUSINESS UNIT PLANS

BOK Key Activities

3.2.2

3.2.3

BOK Tools

**3.3.2, 3.3.3, 3.3.4,
6.3.1, 6.3.9, (5)**

Step 7: DEVELOP ANNUAL PLANS AND STRATEGIC BUDGET

BOK Key Activities

2.2.3

BOK Tools

**3.3.2, 3.3.3, 3.3.4, 3.3.6, 3.3.7,
6.3.1, 6.3.9, (6)**



Step 8: PREPARE IMPLEMENT

BOK Key Activities

**5.2.3,
6.2.2, 6.2.3,**

BOK Tools

**3.3.2, 3.3.3, 3.3.4, 3.3.6, 3.3.7,
5.3.1, 5.3.2, 5.3.3, 5.3.4, 5.3.5,
5.3.10, 5.3.11, 5.3.12, 5.3.13,
5.2.14
6.3.2, 6.3.7, (17)**

Step 9: DRIVE IMPLEMENTATION AND TRANSFORMATION

BOK Key Activities

3.2.3, 5.2.1, 5.2.2

BOK Tools

**5.3.1, 5.3.2, 5.3.3, 5.3.4, 5.3.5,
5.3.6, 5.3.7, 5.3.8, 5.3.9,
6.3.4, 6.3.5, 6.3.7, 6.3.14, 6.3.15
(14)**



Step 10: CONDUCT ANNUAL STRATEGIC REVIEW AND UPDATE

BOK Key Activities

**BOK Tools
6.3.15, 6.3.16 (2)**

Step : PARALLEL STAKEHOLDER INVOLVEMENT

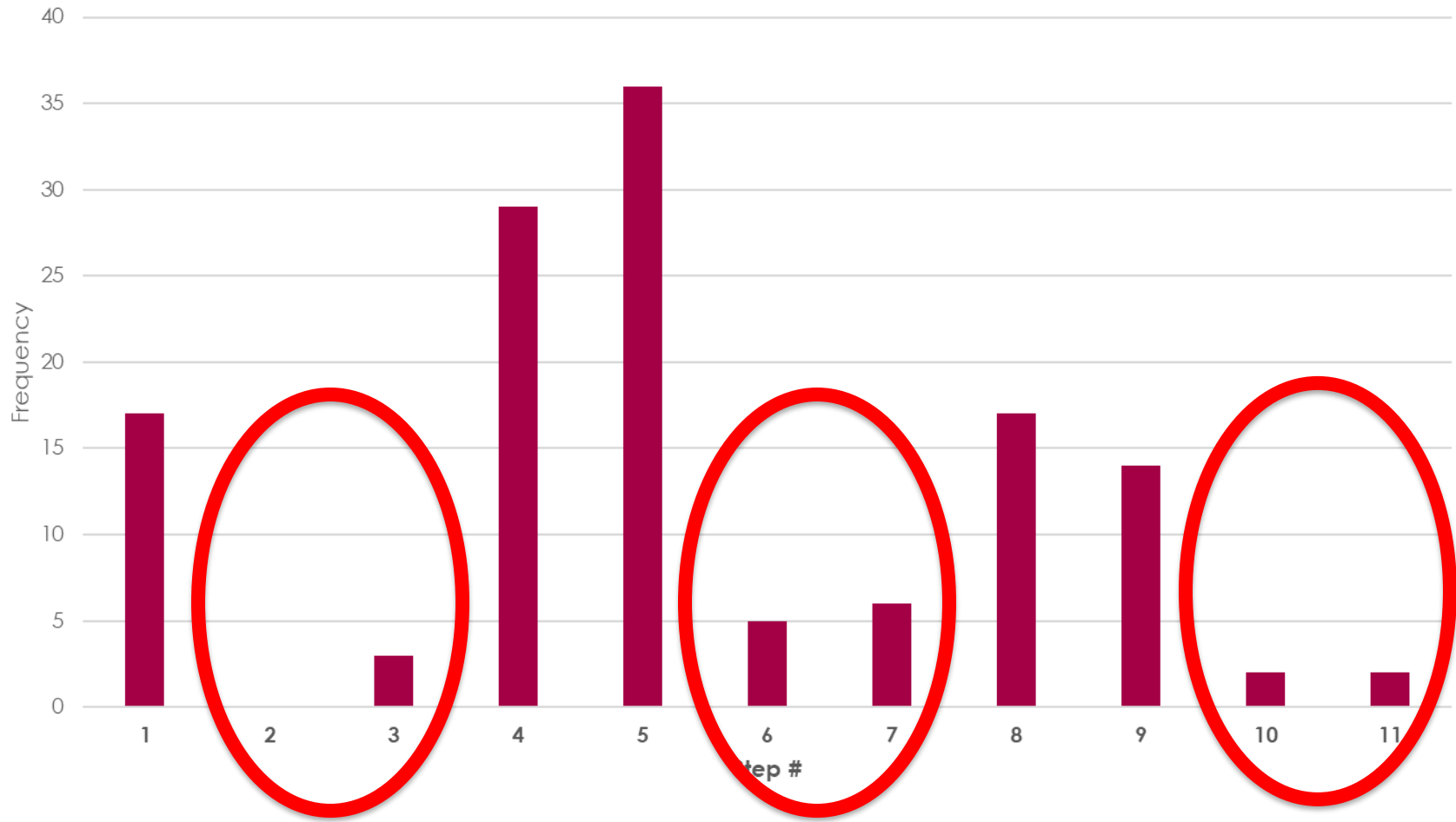
**BOK Key Activities
5.2.4**

**BOK Tools
5.3.10, 5.3.14, (2)**

<https://www.hainescentre.com/research-based/strategic-planning-research-comparisons/>



Mapping BOK 3.0 Tools to 10 step SMS





Strategic Planning Research Comparisons

I. Reinventing Strategic Planning™

1. Plan-to-Plan™
2. Ideal Future Vision
(4 components)
3. Key Success Factors
4. Current State Assessment
5. Strategy Development
6. 3-Year Business Planning
7. Annual Plans/Budgets
8. Plan-to-Implement
9. Strategy Implementation and Change
10. Annual Strategic Review and Update
11. Parallel Process
(Key Stakeholder Involvement)

14 Other Models

1. 4 out of 14 had a similar step
2. All had some components.
None had all 4 components.
3. 2 out of 14 had a similar step
4. 13 out of 14 had this step
(a number had it as first step)
5. 11 out of 14 had this step
6. 4 out of 14 had this step
7. 7 out of 14 had a similar step
8. None had this step
9. 8 out of 14 had a generic or similar action planning step.
None had a change management step
10. 6 out of 14 had a similar step
11. None had this



II. Enterprise-Wide Change Model

1. Outputs
2. Tasks (Quality/Service)
3. Leadership/Management Skills
4. Resources/Technology
5. HR/Rewards Systems
6. Organization Design
7. Teams
8. Strategic Planning
9. Culture
10. Environment
11. Values
12. Strategic Change Management System
13. Feedback
14. Systems Model
15. Customer

13 Other Models

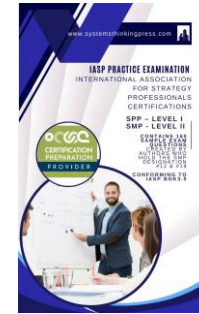
1. 8 out of 13 had a similar step
2. 10 out of 13 had a similar step
3. 9 out of 13 had a similar step
4. 10 out of 13 had a similar step
2 out of 13 included technology
5. 8 out of 13 had a similar step
6. 10 out of 13 had a similar step
7. 4 out of 13 had a similar step
8. 5 out of 13 had a similar step
9. 6 out of 13 had a similar step
10. 7 out of 13 had a similar step
11. 2 out of 13 had a similar step
12. 1 out of 13 had a similar step
13. 1 out of 13 had a similar step
14. 8 out of 13 had a similar item/philosophy
15. 4 out of 13 mention the customer



Reinventing Strategic Planning: The Systems Thinking Approach®

•ebook, included with workshop – on [Amazon](https://www.amazon.com)

Resources updated for BOK 3.0 – old versions still available on amazon [Vol I](#) and [Vol II](#)



Sections of the updated versions are included in content for online workshop:

•eBook: Strategic Thinking, Leadership, Planning and Change - *Building Organizational Systems that Work* – By Barbara A. Collins, M.S., SMP on [Amazon](https://www.amazon.com)

•eBook: IASP Certification Practice Exam (BOK 3.0) on [Amazon](https://www.amazon.com)



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