



# SDP Strategic Plan Town Hall Webinar

December 5, 2017

## *Speakers*

**Ellen Coopersmith** - SDP President; Founder & President, Decision Frameworks

**Larry Neal** - SDP Past President; Independent Consultant, Retired from Chevron

**Jim Driscoll** - SDP Vice President/President Elect; Decision Quality Program Office, Intel



# Town Hall Panel



**Larry Neal**  
SDP Past-President  
Retired Chevron



**Ellen Coopersmith**  
SDP President  
Decision Frameworks



**Jim Driscoll**  
SDP Vice President / President Elect  
Intel



**Hilda Cherekdjian**  
SDP Executive Director



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# SDP Strategic Plan 2017-2020

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# Today's Agenda

- Overview of the plan and process – Larry
- Current activities to support plan implementation – Ellen
- Continuing execution through the next phase – Jim
- Wrap-up



SDP Strategic Plan 2017- 2020

# **OVERVIEW OF THE PLAN & OUR PLANNING PROCESS**



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# The Planning Process

- Strategic Planning Committee formed and kicked off in February/March 2017
- Input gathered from each council, the BOD, EC, and past Presidents
- Framed the opportunity to identify overall objectives and reviewing the current state of SDP
- Developed a future state narrative to guide strategy development and goal setting
- Established strategic themes and a timeline for implementation
- Documented conclusions and presented findings to the BOD and council chairs in May
- Presentation to the BOD and adopted in June

# Current State

## Where We Think We Are

- Councils are proactive
- 1 active chapter and 3 under consideration
  - Houston (active)
  - London, Australia, Calgary
- Interest group concept is being kicked off
- 1 trial/experimental topical conference (SDM) has been held
- RHA award is active but not actively being pursued by organizations
- Hero awards announced but not yet active
- Strategic partnerships concept developed but not active
- Annual DAAG conference is profitable
- Immediate financial status is marginal
- Effort to enhance sponsor benefits is under way
- Considering application for 501c3 non-profit status with IRS



# Future State

## Where We Think We Want to Be

- Awareness and utilization of DQ and of SDP is established and growing
- Membership has grown substantially
- Financial reserves are adequate to fund new activities and expand staff as necessary (can see more staff)
- Chapters and interest groups meet regularly
- SDP has strong strategic partnerships with other aligned organizations jointly promoting DA/DQ in a broad range of areas
- SDP actively supports DA/DQ in academic curricula at all educational levels, from elementary school to the university
- SDP Awards are recognized and valued
- Multiple conferences and special events are held annually in addition to DAAG



# Achieving SDP's Promise How We Can Get There

- Sustainability Strategies
  - Visibility and Marketing of DA/DQ
  - Organizational Strategy
  - Business Strategy
- Value Delivery Strategies
  - Conferences/Events/Knowledge Sharing
  - Social Media/Web Strategy
  - Certification/Recognition Strategy

# The Proposed Plan in a Nutshell

## A Multi-year Decision Agenda

- 2017 (Reframing, Setting the Stage)
  - Support & monitor activities that are in flight
  - Secure sponsor benefit improvements
  - Review the vision/mission/organization and update, if deemed necessary, to support future activities
- 2018 (Reasoning, Data Collection, Adjustment)
  - Establish metrics and procedures to support new activities with a focus on minimizing ambiguity, risk and resource drain
  - Continue to evolve DAAG as appropriate
  - Initiate additional outreach efforts (i.e. certification, marketing plans, awards)
- 2019 – 2020 (Evaluate and Adjust)
  - Measure progress and adapt as necessary



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# **PLAN BUILD OUT & IMPLEMENTATION**



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# Strategy implementation involves parallel efforts

- Mapped the elements of the strategic plan into buckets
  - Nikes
  - Pilots
  - Strategy buildouts
- Assigned elements to the BOD, councils and or strategy sub-teams
- Set target of May and June 2018 recommendations to BOD

# Nikes are underway

- Shifting role of BOD and councils from operational to strategic alignment
- Strengthened role of BOD liaisons to SDP councils
- Building up and reorganizing councils where needed
- Laying the foundation for an increase in different types of revenue streams into SDP
- Building financial plan and targets to sustainability
- Putting processes in place where needed
- Strengthening the sense of community within SDP service providers and operators

# Pilots will guide future direction

- The Mentoring Program
- Technical Interest Groups – Scenario TIG
- Sponsor organization displays/tables at conferences
- Parallel sessions at the annual conference
- Multiple days of courses at the annual conference
- Growing SDP chapters
- Broadening the target for the annual conference to DP's and project leaders
- Joint organization conferences - February 2018 SDM, Shared Decision Making Summit

# Some councils have clear remit strategy buildouts

- Certification
  - Broaden types
  - Raise number
- Outreach & Communication
  - Social media
  - Joint organization conferences/initiatives
  - Speakers bureau
- Awards
  - New awards
  - Raiffa-Howard ODQ assessment
- Membership
  - Growth
  - Benefit enhancement

# BD council will lead multi-council strategy buildouts

## Strategy Sub-teams

- Chapter
- Community involvement
  - DQ facilitation for non-profits
  - DQ community education
- Broader Swath
  - If/how to bring non-DPs into SDP

## Strategic Approach

- Vision mission relook
- Leads & sub-teams
  - Council representation
- Decision maker input
- Frame and alternatives
- Qualitative assessment
- Recommendation



# Your involvement drives SDP success

- Membership is growing
  - ~394, with 49 new paying and 28 new students
- Calgary chapter formed and held its first meeting in November
- Seattle chapter formation is in progress
- Non-profit DQ facilitation and involvement growing
  - Harvey school reopening, Boy Scouts, Girls on the Run, YES Prep
- Please help shape how SDP will broaden DQ impact



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**CONTINUING EXECUTION  
THROUGH THE NEXT PHASE**

# What to Expect in 2H'18 and Beyond (1 of 2)

- The initiatives in this plan will likely result in changes to how we operate as a society
- Examples include:
  - Greater communication and coordination between leaders in our chapters, in our councils and on our Board
  - Clear decision rights and robust processes and procedures which will benefit from best practices in decision-making
  - Social media as an important avenue for professional communication and collaboration
  - A multi-year financial forecast that helps us underwrite new and different events and programs

# What to Expect in 2H'18 and Beyond (2 of 2)

- Our detailed plans will evolve as we go but we will remain focused on achieving our future state
- We will act, learn, and adjust as needed, always asking:
  - How can we nurture existing chapters and grow new ones?
  - How can we encourage and support members to get involved in their communities and showcase their good works?
  - How can we efficiently deliver more and varied events that profit the society and our membership?
  - How can we bring new and different leaders into SDP and safeguard the professional standards we hold dear?
  - Overall, how can these efforts work together to grow our ranks and our impact?

# Success in the Next Decade of SDP

- 2020 will mark the 10th anniversary of our founding
  - We have worked hard as a society to get to this point
- SDP's strategic plan represents an exciting opportunity
- Your active involvement in this plan will ensure our next decade is an even greater success

# Question #1: Feedback on the Strategic Plan

**Please select the single statement that best describes your viewpoint regarding this strategic plan:**

1. I am closely aligned with this strategic direction.
2. I like the plan but still have some questions.
3. I am not in agreement with the plan as described.
4. I don't yet have a strong opinion about the plan.

## Question #2: Feedback on this Format

**Please select the statement below that best describes your views on the town hall format of this meeting:**

1. We should make frequent use of this format
2. We should reserve this format only for big changes
3. I would not recommend future town halls
4. I don't have a strong opinion about the format

## Question #3: How Can We Help?

**How can we best assist you following our conversation today (select all that apply):**

1. Please help me become an SDP member.
2. I would like to get involved in implementing the plan.
3. I would like time to further discuss the plan with you.
4. I don't need any assistance at this time.



# THANK YOU

For questions, comments or to get involved, please contact:

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