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## SCOTT SPANN, MPA

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### **SUMMARY OF QUALIFICATIONS**

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I excel in the ability to simplify complex business, organizational and individual challenges and then co-create strategies, metrics, systems and behaviors for resolving them. For over 16 years, I've worked with executives of F100 companies, venture capital firms, startups and non-profits to develop strategic clarity, identify key strategic initiatives, create executive team alignment and leadership capacity, resolve cultural and strategic obstacles to mergers and acquisitions, and design/deliver cultural change initiatives.

### **CORE COMPETENCIES**

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**Strategic Thinking/Capacity Development**

**Leadership Development**

**Organizational Design/Development and Cultural Change**

**Collaborative Decision Making and Alliances/Partnerships**

### **TYPICAL CLIENTS:**

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AT&T, Blue Cross/Blue Shield, Chase-Chemical Bank, Consilient Software, Enserch Energy; Oakhill Venture Partners, TXU, Vail Resorts.

### **SOME HIGHLIGHTS:**

- Took the embattled leadership teams in a combined \$20B F100 merger to an offsite retreat on the day their deal closed; designed and delivered a leadership development session combining vision/values alignment; task-centric team building; personal assessment/development and 1-on-1 relationship assessment/building processes. The CEO celebrated this as the best offsite of his 25-year career; team members broke through to levels of relationship not achieved in 10-20 years together. This became the basis of an eventual rollout to 15,000 employees.
- Delivered a comprehensive strategic assessment, analysis, and implementation process for a bay-area software company. The process included a one-page, comprehensive, systemic representation of the company and key stakeholders; an analysis of key trends affecting the company; a assessment of stakeholder objectives, expectations and deliverables; identification of key strategic leverage points in the company; and a set of new, systemic performance indicators for each functional area in the form of leading (vs. traditional lagging) indicators. The primary investor in the company (a former McKinsey consultant) touted the analysis as "better than anything I've seen at McKinsey". For the team, the process enabled each executive to clarify their role in the strategy, to understand (even challenge and refine) each function's contribution to the strategy, and literally "see" the company as a whole, interdependent system.
- Designed/delivered a strategic development process for the largest (\$6B) subsidiary of a 50-year old F100 company whose executives, though excellent within their functional areas, fundamentally did not understand their "business". Through this process, they each identified their strategic core competencies; refined them through a series of scenario planning exercises; developed requisite cross-functional working relationships; and tested their new capacities via a set of competitive simulations.
- Led a team of strategists and systems-thinkers to develop a company-wide simulation of a \$40B F100 company facing deregulation. The simulation was used to anticipate the effects of changes in legislation, competitive attacks, pricing, and planned re-structuring of the company. The simulation software allowed executives to "run" the company, exploring and learning which combination of strategic initiatives would succeed over time and which would fail.
- Worked with a premier ski resort company to address the increasing overwhelm facing their most strategically significant functional area. Elicited from various stakeholders the implicit strategy for the company; developed a one-page, comprehensive "map" of the division's strategic dynamic relative to the company's overall strategy. Used this as the basis of a team event to integrate and refocus the team on their strategic priorities. Eventually used this process to define specific, measurable team and individual metrics for the division as a whole and designed the accompanying real-time strategic reporting/management system.

## **TYPICAL ENGAGEMENTS:**

### **Strategic Thinking and Capacity Development (in addition to those cited above):**

- Conducted strategic assessment/analysis and marketing study for software startup, re-positioning them from a small player in an overcrowded field to a visionary leader in a leading edge application space
- Led a team of systems thinkers and strategists in a system-wide planning effort for an renowned municipality incorporating key stakeholder perspectives to create an integrated strategic and budgetary decision making platform

### **Executive Development and Personal Transformation**

- On-site coach/consultant to the newly appointed CEO of a troubled technology startup helping him to build/develop his team and organization
- Coach to the leader and executive team of a leading municipality, designing and delivering a leadership assessment/development program
- Coach/strategic consultant to the newly appointed president of the largest business unit of an F100 company facing significant organizational restructuring and dramatically increasing competition
- Coach to a CEO in transition as his \$7B company is successfully acquired/integrated
- Counsel to the CEO of a F100 company re: the assessment/integration of the leadership of a newly acquired, troubled company
- Designed/delivered a strategically oriented leadership development program tying leadership performance to organizational performance for an organization with 75 MM customers
- Designed/delivered transformational leadership programs to F100 executive teams

### **Organizational Design/Development and Cultural Change**

- Designed and implemented a organizational structure to ensure timely, productive, and accurate decision making checks and balances in a rapidly growing software startup
- Designed/delivered organization-wide, “straight-talk” based performance management system for a technology startup of 120 people
- Designed/delivered cultural assessment and follow-on personal responsibility-based cultural change process for a internationally renowned municipality
- Designed/delivered cultural change rollout to a 15,000 person F100 organization designed to transition the organization from a hierarchical, rules-based organization to a participatory, free-thinking one

### **Collaborative Decision Making and Ongoing Alliances/Partnerships**

- Successfully integrated two competing sales divisions in an F100 client using stakeholder assessment/alignment, personal transformation and systems thinking processes
- Designed/delivered a breakthrough 1-day strategic offsite for the conflicted board of a non-profit leading to the successful launch of a land preservation group in the Vail Valley
- Deployed systems thinking, appreciative inquiry, and relationship assessment processes to align the divisive executive team of the treasury group for an F100 company
- Used systems thinking and “difficult conversation” technologies to amicably re-unite the embattled employees of the strategically critical department of an internationally renowned municipality
- Facilitated the successful post-merger integration of two adversarial leadership teams for a \$20B, F100 client

## **EXPERIENCE**

- **President, Generative Strategies Inc, 1999-present** – a company that applies systems thinking, collaboration technologies, and processes for individual development to design strategic initiatives for a range of clients from F100's and software companies to non-profits and venture capitalists.
- **Vice-President, ARC International, 1994-1999** – an international consulting firm specializing in transforming human behavior/performance in the workplace working exclusively with F100/500 clients.
- **Psychotherapist in private practice, 1989-1994** – worked with victims of torture, airline disasters, war, and other physical/emotional traumas; lectured to hospitals/treatment centers on Trauma therapy and Developmental Psychology; and co-founded the Center Green Wellness Community (Boulder's leading group of holistic doctors, chiropractors, acupuncturists, psychotherapists, and body-workers).

- **Executive Director, The Rolf Institute, 1987-1989** – established their European, Brazilian and Australian offices; restored them to sound financial performance; re-engineered their financial and operational processes; transitioned the organization from a closed “patriarchy” to a transparent membership organization.
- **Vice-President, Research & Planning Consultants, Inc., 1983-85** – second in command of this nation-wide consulting firm that specialized in litigation support, policy formulation, and demographic/market research for regulated industries.
- **Systems Analyst, Systemas, 1982-83** – Cold called, sold, designed and delivered timesharing databases for financial, inventory, order entry, and customer service systems to a variety of small business clients.
- **Executive Director, The Texas Nature Conservancy, 1978-1982** – Established the Texas office of this international organization. Acquired over 70K acres of land valued a \$20MM; won The Nature Conservancy’s Outstanding Chapter Award in our 3<sup>rd</sup> year; and served on the international strategic planning group.
- **Arthur Andersen & Co, 1977-1978** – worked across the audit, tax, and consulting areas in Oil & Gas, Banking, Manufacturing, Distribution, Retail, Real Estate Development, Healthcare, Government, Non-profits, and Education.

#### **EDUCATION:**

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- University: University of Texas Graduate School of Business, MPA, 1977; University of Texas, BA – Accounting, 1975
- Trainings/Certifications: *Trauma Psychotherapist*, Ergos Institute, 1990-1993; *Developmental Psychology*, Bodydynamics Institute of Denmark, 1991-1994; *Certified Rolfer*, The Rolf Institute, 1985-1986.
- Related coursework: *Qualities of Mind Leadership Program*, Meridian Institute, 1995; *Intermediate Systems Thinking*, High Performance Systems, Inc., 1997; *Advanced System Thinking*, High Performance Systems, Inc., 1997; *Foundations*, Coaches Training Institute, 2001.

#### **COURSES TAUGHT/CONFERENCE PRESENTER:**

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- *Emerging Leaders Program*, Center for Management & Executive Development, University of Arkansas Sam Walton College of Business, 2003
- *Strategic Clarity*, executive teams, 1998-present
- *Breakthrough Leadership*, leaders at various levels, 1997-1999
- *Leading Cultural Change*, Denison User’s Group, Univ. of Michigan School of Business, 1997
- *Transforming Organizational Culture*, American Society for Training and Development, 1997

#### **AFFILIATIONS:**

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- Chairman, *The Institute for Strategic Clarity*
- Member, *The System Dynamics Society*

#### **References:**

CEO’s, COO’s, CTO’s, Presidents and SVP’s from technology startups to Fortune 100 companies available upon request.