

Fall 2025 CAE Study Group

Domain 3: Organizational Strategy
October 15, 2025



1

Domain 3

**Organizational
Strategy**

Content Outline

**(11-13% of
exam)**

**Critical Analysis
and Planning**

**Knowledge
Management**

Digital Strategy

2

Domain 3 Guiding Principles

Strategy Is a Living System of Alignment and Adaptation

Knowledge and Data Drive Strategic Intelligence

Digital Strategy Is Integral to Organizational Success

3

Strategic Management – The Big Picture

Where vision meets execution

Strategy is a continuous system, not a one-time plan.

Align governance, staff, and resources with the association's vision.

Cycle: Analyze → Plan → Execute → Measure → Learn → Adapt.

Integrates past performance, present realities, and future goals.

4

Embracing Ambiguity and Change

The hallmark of effective leadership



Successful leaders are comfortable with uncertainty.



Anticipate change — don't just react to it.



Build adaptability and foresight into organizational culture.



Encourage teams to stay flexible amid shifting member needs and environments.

5

Aligning Governance, Strategy, and Operations

Turning vision into coordinated action

The board defines the vision and outcomes.

The CSE translates strategy into plans and measures.

Staff executes initiatives aligned with goals.

Clear communication ensures strategy → goals → execution alignment.

6

Measurement and Accountability

Tracking progress and driving improvement

Use data-driven metrics to measure strategic success.

Evaluate both output (results) and organizational health (culture, morale).

Continuous assessment ensures agility and learning.



7

Fostering Agility and Innovation

Creating a culture of continuous improvement

Welcome ideas from all levels of the organization.

Ask integrative questions:

How does this fit our people and processes?

What adaptations are needed?

Who else should weigh in?

What are next steps and checkpoints?

Encourage experimentation and calculated risk-taking.

8

Knowledge Management & Digital Strategy

Harnessing data, technology, and insight



Knowledge management and digital strategy must be:

Member-centric

Cross-departmental

Tech-enabled and measurable

Use digital tools to connect strategy, operations, and member experience.

Encourage data sharing and collaboration across functions.

9

Connecting the Domains

Bridging leadership and operations

Domain 3 links Domain 2 (Leadership) → Domain 4 (Operations).

Turns vision and foresight into strategic execution.

Focuses on alignment, adaptability, and accountability across the organization.

Ensures that every resource and activity supports the long-term mission.

10

Critical Analysis & Planning

— Guiding Principles

11

1. Methodical, Future-Focused Planning

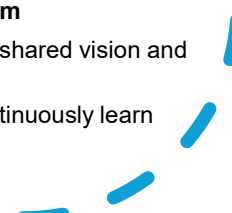
- Strategic foresight and scenario planning build **resilience and adaptability**.
- Align resources, structure, and strategy to evolving realities.

2. Holistic Leadership via the 3 Sight Lenses (3SL)

- Balance **stewardship**, **membership**, and **leadership** to sustain, serve, and innovate.
- Integrate short-term delivery with long-term vision.

3. Strategic Management as a Living System

- Align **governance and operations** toward shared vision and measurable success.
- Combine metrics, culture, and agility to continuously learn and evolve.



Critical Analysis & Planning

— Guiding Principles (continued)

12

4. Data, Systems, and People Alignment

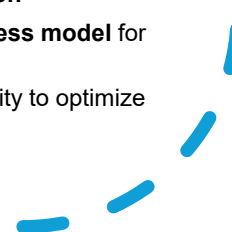
- Build strong **reporting, planning, and technology systems** to connect work to mission.
- Empower teams through coordination, clarity, and communication.

5. Culture, Talent, and Inclusion as Strategic Drivers

- Recruit and nurture talent aligned with strategy and culture.
- Embed **DEI principles** in both staffing and member engagement.

6. Business Model Oversight and Innovation

- Continuously assess and evolve the **business model** for relevance and sustainability.
- Leverage research, technology, and creativity to optimize member value and growth.



Knowledge Management – Exam Insights

🧠 Knowledge management is an intentional system—designed to make information usable and actionable.

🧠 Content governance directly links to strategy, efficiency, and mission alignment.

🧠 Remember the three core functions—collect, create, connect—as foundations of organizational learning.

🧠 Link knowledge creation directly to member value and innovation outcomes.

13

Turning Information into Knowledge

Knowledge emerges when data patterns are recognized, understood, and applied in context.

Effective knowledge management removes barriers to information flow and encourages cross-organizational sharing.

Goal: Right knowledge, right people, right time.

14

Core Principles of Knowledge Management



Knowledge management includes three ongoing processes:



1. **Collect** and organize qualitative and quantitative content.



2. **Synthesize** and **analyze** information to generate insights and innovation.



3. **Connect** people and systems to reuse knowledge and inform better decisions.

15

Building a Learning Organization

Associations thrive when they discover, share, and apply knowledge.

The Why–How–What Framework:

- Why: Member-centered purpose.
- How: Actionable processes.
- What: Continuous learning organization.

16

Content Strategy and Governance

Content strategy supports knowledge acquisition and application.

Every piece of content must serve both audience and organizational goals.

Strong content governance defines policies, roles, and workflows for consistency and efficiency.

Effective governance ensures relevance, alignment, and speed of content delivery.

17

Technology, Integration & Continuous Improvement



Integrate systems to track member engagement, content performance, and organizational outcomes.



Align staff, budgets, and reporting with measurable business goals.



Promote cross-functional collaboration for data-driven decisions and seamless knowledge sharing.



Exam Insight: Technology enables strategy—connecting knowledge, content, and member value delivery.

18



Questions?

Denise Froemming, CAE, CPA
President & CEO
CalCPA

denise.froemming@calcpa.org