



## **Strategic Planning & New Activity Development**

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This module is designed to give you a fundamental overview of the value inherent in a philosophy of planning and new activity development within a standards program.

At the end of this module, you will be able to understand:

- the reasons for introducing and implementing the philosophy
- the necessary components to ensure success of the philosophy
- the means to incorporate the philosophy into a committee structure, and
- the value of timelines, goal setting, and flexibility

### **Strategic Planning**

ASTM International committees are designed to reflect the breadth of the industries they represent, with all stakeholder groups present. Due to the inherent complexity of many industries, it is imperative that committees retain focus in regard to their overall mission – strategic planning (SP) is a tool that can greatly assist a committee in accomplishing this goal. A comprehensive SP philosophy reinforces a committee’s strengths, provides direction and focus, helps an activity move toward a desired result, and maximizes potential resources.

### **The Strategic Planning Process**

The backbone of a successful SP program is contained in an easy-to-follow series of 7 basic steps:

- A survey of the status quo
- The identification of future needs
- The definition & prioritization of goals
- The development of an implementation plan
- Defining measurable & attainable milestones
- Measuring & cataloging progress, and
- Continuous re-assessment of status

### **Survey Current Status**

The gathering of accurate information is critical to the success of all steps to follow. ASTM International has many resources available to assist the committee in the development of an overview, a standards development profile, and a matrix specifying usage of standards within a particular marketplace. Equally important to these tangible pieces of information are their more theoretical counterparts. An analysis of committee strengths & weaknesses, the % of actual “participation” on a committee versus the total membership, and the presence or absence of international considerations will help complete this very important puzzle.

### **ID Future Direction & Needs**

New activity development is extremely important for a committee to retain its relevance to the industry it serves. As we progress in this module, additional information will be presented on this topic.

Another key to retaining relevance is the ability to accurately anticipate emerging industry trends. In many cases, answers to these questions can be found in extremely likely and obvious places such as a customer base or the focus of an internal research program. There is a tendency to add complexity to the process of strategic planning – it is important to fight this urge and remember that many resources are available in the next office, on another floor of the building, or via a phone call or email.

And finally, although the focus of ASTM International is the development of standards, remember to think beyond standards in order to develop a comprehensive vision of your industry – areas such as training, proficiency testing, or symposia may be relevant to this process.

### **Define Goals & Priorities**

The assignment & prioritization of goals goes beyond the development of a simple wish list and should contain a brief (but complete) statement of purpose, as well as time schedules and indications of measurement, as accuracy is very important to this process. The current availability of resources on the committee should have an impact on the establishment of priorities. By taking advantage of available resources, you will be able to make immediate progress, while working to locate and attract additional resources for areas that are currently under-represented.

Remember to be realistic when setting goals – items that are overly ambitious may ultimately be unattainable, thereby sapping momentum as well as enthusiasm.

### **Develop Implementation Plan**

The implementation plan is the glue that ties together the industry survey, the industry trend analysis, and the identification and prioritization of goals. The implementation plan needs to be focused in such a way as to ensure that it will serve its intended purpose, while not becoming too cumbersome or unwieldy as to alienate those individuals responsible for its implementation – buy-in from the key committee and industry stakeholders is a crucial step in this process. And like goal definition, the implementation plan must be realistic.

The establishment of incrementally spaced milestones that are ambitious as well as attainable will help the plan maintain a healthy pace.

### **Strategic Planning Can't Stop With the Plan**

A common failure with strategic planning is the loss of enthusiasm that stems from the waning of momentum. Causes of this include plans that are overly ambitious, goals that are too lofty, and inconsistent manpower and stakeholder support. Some of these factors are avoidable; others are not. It is the responsibility of the committee leadership to ensure that the strategic plan is achievable, and that key tasks are staffed with appropriate individuals.

On occasion, and despite the best of efforts and intentions, things may not proceed as they should. It is for this reason that the most effective strategic plans are those that account for an occasional failure and establish contingencies to ensure that the job gets done.

### **Achieving Success**

There are things that can be done to enhance the likelihood of success – simplicity and clarity are key when developing the statements of purpose for committee goals, specific and targeted dates create a necessary sense of rigidity and are useful in the establishment of accountability for those assigned to implement critical tasks, and a regular review mechanism can help identify areas of concern before they become problematic.

### **Measuring Progress**

A properly motivated stakeholder group should make frequent attempts to review the progress of the strategic planning initiative and take corrective action where necessary. Accountability is a key component to the overall success of this initiative and the adjustment of dates, schedules, or even responsibilities should take place where necessary. Equally important is the rewarding of accomplishments; few things are as rewarding as the respect and admiration offered by one's peers.

### **Incorporating Planning Into Committee Structure**

In order for a strategic planning initiative to be successful, it must be viewed as a priority by the committee membership in addition to the committee leadership. In most cases, the effort should be confined to the executive subcommittee, (which represents the elected and appointed leadership of a technical committee) or to an ad hoc group under the leadership of an elected officer such as the vice chairman of the committee.

Strategic plans cannot exist in a vacuum – frequent communication to the committee membership regarding goals, priorities, milestones, and modifications to the plan will help facilitate its implementation and continue to foster necessary buy-in.

In many cases, necessary input may not be found within the current committee population. Every effort should be made to seek out those stakeholders and engage them in the planning process – it is dangerous to assume that all necessary stakeholders are aware of the activity currently underway. For this type of outreach, as well as many of the other elements of the strategic planning process, don't forget the resources that can be brought to bear by ASTM International.

The success of a strategic planning initiative is as important to ASTM as it is to you – it is in both of our interests that you succeed.

### **New Activity Development**

ASTM International places a premium on its technical committees developing high quality, market-relevant standards. As an organization, ASTM holds itself to the same standard of relevance by striving to always remain at the head of the standards development curve. This commitment by ASTM is most clearly seen in the area of new activity development and its generation of new content, new membership, and new ideas.

### **Initiation of New Activities**

Requests to form new ASTM activities may be initiated by anyone who identifies a need in a given industry or profession. A company, organization, trade association, professional society, university, government agency, or a single individual may request the development of a new ASTM activity.

In order to establish a viable and successful new activity within ASTM, there is a variety of information that must be provided. ASTM requires this information to evaluate the levels of interest and support necessary to organize the activity, facilitate consensus among the activity participants, establish an effective product development strategy with the activity participants, promote the activity throughout the industry or profession, administer the day to day activity operations, support editorial and production needs, and develop successful marketing plans for the activity.

### **Potential Areas for Activity**

There are many levels of new activity development – they range from the identification of a need for a single standard to the establishment of a standards program for an entire industry sector. In all cases, there is consistency in the means to uncover these potential areas, including:

- ❑ The evolution of technology in the marketplace – new products require new standards
- ❑ Marketplace issues such as expansion or consolidation – each with its own set of opportunities
- ❑ Regulatory issues and the urgency that they can stimulate
- ❑ Topics of controversy - the old saying that you only get flak when you're over the target
- ❑ Internal research sources, and
- ❑ International considerations

### **New Activity Proposal**

In order to make an informed decision regarding the strength or weakness of a new activity opportunity, it is often preferable for the committee to request a proposal to be submitted by the person or persons requesting the activity initiation.

Components of the proposal include:

- ❑ What factors are driving the request? Are there safety concerns, quality initiatives, marketing strategies, commercial requirements, or regulatory pressures?
- ❑ What benefits are expected from the resulting activity and how will this impact the industry/profession? Is there successful industry self-regulation, industry cost reductions, increased expertise levels within the industry, or reduction in injuries?
- ❑ What is the expected or desired use of the resulting information products? Will they be used by a government regulatory body or in a buyer/seller contractual agreement?
- ❑ Is time a factor? To the extent possible, attempt to uncover the ideal development time frame for each prioritized information product. For example, if standards are needed immediately, there are expedited procedures that can be implemented to meet those needs.
- ❑ What areas of expertise are required to successfully develop these products? This should include all interested areas of expertise such as manufacturers, their customers, representatives from academia, consultants, government employees, and consumers.
- ❑ What trade journals or other publications should receive promotion concerning the activity? If possible, provide the address and the editor's name for each publication.

ASTM International has significant resources that can be brought to bear to help gather the information necessary to make an informed decision in this area – don't hesitate to ask for help.

### **Development Process**

Key individuals involved in the field must be contacted to initially assess the need and interest in the proposed activity. Relevant questions should be asked that are specific regarding final deliverables. On occasion, industry representatives may exhibit a defensive posture during the gathering of this information – the goal is to attempt to determine the reason for the emotional response and evaluate the full potential of the activity.

Research into the activities of ASTM committees and outside organizations is necessary to avoid jurisdictional conflict and duplication of effort. Information sources include the ASTM Index and new standards database, Worldwide Standards Service database, and the Encyclopedia of Associations.

In many cases, the market for products goes far beyond the individuals and organizations that participate in the development of those products. Attempt to identify the industry segments that would benefit from using these products. Determine if there any other market forces that will impact these products – has there been rapid growth of a particular segment or a forecast demand in a specific area?

Remember that ASTM core competencies are the development and delivery of technical information. It is important to align the objectives of the any new industry segment with these organizational capabilities.

### **New Standards Development Activity**

New standards development activity should be housed within a strategic planning program and is extremely process oriented. Factors to consider when exploring and organizing new standards activity include the

- ❑ Identification of Leadership, Expertise, & Related Organizations: This element is critical. Without adequate volunteer leadership, a viable ASTM activity cannot be organized. Are you able to serve in a leadership position on this new activity? Are there any other individuals who would be willing to provide activity leadership?
- ❑ Holding Appropriate Meetings: There are typically 3 stages of the organizational process for new activities within ASTM International – exploratory, planning, and organizational. Each stage builds upon its predecessor and increases the number of industry stakeholders. Choose meeting dates that are convenient for the key attendees, and try to avoid conflicts with other industry meetings. The location of the meetings can be ASTM Headquarters, but should always focus on maximizing the opportunity for attendance. A mailing including a cover letter, agenda and response form should be prepared and distributed to the invitee list. It is important that the mailing be distributed at least six weeks before the meeting if possible.
- ❑ Networking: This is an often-overlooked source of information, as well as a benefit of new activity initiation.
- ❑ Follow-up Publicity & Membership Promotion: Immediately after any new activity meeting, minutes should be prepared and distributed to all attendees. As the new activity proceeds to its first working meeting, extensive publicity and membership promotion should be done with the assistance of ASTM and its corporate communications department. These functions are necessary throughout the life of all activities.
- ❑ Identification of Other ASTM Products: New standards initiatives may require new methods of packaging, delivery, or distribution. Remember the flexibility that ASTM offers when discussing these issues with the proponents of new activities.

### **Conclusion**

Strategic planning and new activity development are critical to the long-term health and relevance of any ASTM standards activity. Please remember that while there are certain common components to the successful design and implementation of these programs, there are different ways to accomplish the final goal. The staff of ASTM International is committed to placing all of ASTM's resources at your disposal in these areas and will offer as much assistance as possible regarding the application of ASTM technology to the planning and new activity processes. Finally, there is significant flexibility within ASTM to assist you in accomplishing a wide variety of standards-related objectives – please do not hesitate to ask if certain goals are attainable.

This concludes our Virtual Workshop on Strategic Planning & New Activity Development. If you have any questions or would like to discuss this topic in additional detail, please contact your committee Staff Manager.

Thank you for your attention.