Strategic Planning & New Activity Development

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Strategic Planning

What is Strategic Planning?

➢ Development of an Action Plan or Roadmap
  ➢ Short Term and Long Term Objectives

➢ Provides direction and focus

➢ Reinforces the assets and attributes of the committee making it stronger

➢ Maximizes efficiency, usage and acceptance
Considerations
➢ Needs of a specific industry / committee
➢ Safety, quality, efficiency
➢ Stage of committee or activity
➢ New, mature, innovating
➢ Desired end goal: utilization of standards
Utilization of Standards

- Organizations SOPs
- Buyer & Seller / Contract agreements
- Laboratories
- Certification, Rating and Training programs
- Codes – building codes, workforce codes
- Insurance and Financial provider programs
- Local, State, Federal, Foreign & International Regulations
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What are your Needs?

➢ Increased and Appropriate Membership
➢ Increased Awareness & Acceptance of Standards
➢ Standards Roadmapping
➢ Accelerated Standards Development
➢ Programs and Services Implementing the standards
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Increased and Appropriate Membership

➢ Review Membership: *Identify who is there & who is missing*
➢ Consider current & future standards
➢ Leverage Executive Subcommittee for Contacts
➢ Develop Outreach Strategy
➢ Develop Materials to Supplement personal outreach
➢ Leverage HQ for Committee promotional materials
➢ Develop invitation letter (staff manager assistance)
➢ Include relevant work where they could impact
➢ Assign Leader (co-leader?) for Exec and Main agenda discussion
➢ Great fit under either “New Business” or “Task Groups Reports”
Increased Awareness & Acceptance of Standards

➢ Develop Communications Strategy
➢ Leverage HQ for Committee promotional materials
➢ Leverage HQ for press releases and social media posts
➢ Include relevant & current work
➢ Develop Committee Presentation Template for consistent messaging
➢ Add 1-2 slides at closing of any presentations at conferences
➢ About Committee, top 3 relevant standards, next meeting
➢ Ask Trade Associations to amplify ASTM press releases to their membership
➢ Outreach Strategy (prior slide)
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Standard Roadmapping

➢ Where are you now and where do you need to be?
➢ Listing of Existing Standards
➢ Where are there gaps?
➢ How do we stay ahead?
➢ What will we need in 5yrs, 10yrs
➢ Determine priorities
➢ Leverage your technical committee
➢ Committee Survey
➢ Industry Survey
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Standard Roadmapping Considerations

➢ What are the biggest concerns facing regulators?
  ➢ Safety?
  ➢ Quality Assurance? Risk Assessments, Risk Mitigation?
  ➢ Reliability?

➢ What are the biggest financial challenges of manufacturers?
  ➢ Product conformance to state programs? Components?
  ➢ Increase costs for production?
  ➢ Audits and Sampling?

➢ What are the biggest challenges of laboratories?
  ➢ Homogenous samples?
  ➢ Variability of test methods?
  ➢ Apparatus / device variability?
  ➢ Reporting requirements?

➢ What are most prominent concerns for consumers / users?
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Two Approaches:

Solve Biggest Issues First
- Interlaboratory testing required
- Altering existing practices for innovative solutions
- Bigger undertaking of R&D
- Establishing new product performance specifications

Low Hanging Fruit
- Commonalities between organizations documented and balloted
- Existing content moved to ASTM, formatting and balloted
- Accepted procedures refined and published

Roadmapping Considerations
Standards Toolbox: Consider the fit

- International, Federal, State, Local Regulation
- Top-Level Standard, Certification Program Manual
- Specification(s) Provide a clear definition of WHAT is required
- Practice(s) Carry out items to meet Specifications or Practices that stand on their own
- Test Method(s) Method to calculate and demonstrate compliance to specification
- Guide(s) Information to assist user in determining what to use or where to find other supporting information.

***All of these items can stand alone, but are also incorporated by reference***
Impact Success

- Mirror Roadmap Sections to Subcommittees
- Consider the Two Approaches for Short and Long Term Priorities
- What Volunteers are at the table?
- How does the Roadmap display the Toolbox impact?

- Easy to modify and easy to report

- Include minimum necessary information
  - type of standard
  - short title
  - priority level
  - rationale
  - affected subcommittee
  - timelines/progress

Roadmapping Considerations
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Maintenance
➢ Coordinated / Led by Vice Chairman / Committee Officer
➢ Format best in common software (word, excel)
➢ High level diagram for presentations helpful
➢ Newsletter / Survey membership bi-annually

Communications
➢ Direct – Roadmap Chairman to Technical Subcommittee Chairmen and/or Technical Contacts
  ➢ WK# / F#
  ➢ Progress or scope changes
  ➢ Ballot updates
➢ Indirect – Subcommittee Minutes
➢ Standards Tracker alerts (new work items, approvals)
➢ Administrative Collaboration Area
➢ Google or Dropbox Doc

Roadmapping Considerations
## Strategic Planning

<table>
<thead>
<tr>
<th>Roadmapping Ad-Hoc TG or Subcommittee</th>
<th>Technical Subcommittees Roles &amp; Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>➢ High-level Mapping</td>
<td>➢ Accept and Suggest Roadmapping Items to Roadmapping Group</td>
</tr>
<tr>
<td>➢ Establish Priorities</td>
<td>➢ Approve Formation of TG / Registration of WK</td>
</tr>
<tr>
<td>➢ Reporting to Executive and Main Committee</td>
<td>➢ Assign Technical Contact / Task Group Chairmen</td>
</tr>
<tr>
<td>➢ Collaboration with Leadership</td>
<td>➢ Handles ballot initiation approvals and results</td>
</tr>
<tr>
<td>➢ Support to Technical contact</td>
<td>➢ Reports Project updates to Roadmapping Group and Main committee</td>
</tr>
<tr>
<td>➢ Suggest Volunteers</td>
<td>➢ Maintains decisions in subcommittee minutes</td>
</tr>
</tbody>
</table>

*Roadmapping Considerations*
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Accelerated Standards Development

➢ Support Services
  ➢ Form and System Manual
  ➢ Online Templates
  ➢ Upfront Editing / Full-time Editor
  ➢ Graphics Department (figures, 3D images)
  ➢ Access to Similar technical standards
  ➢ Interlaboratory Study Program Department

➢ Collaboration Services
  ➢ Webex
  ➢ Collaboration Areas
  ➢ Meetings

➢ Workshops
  ➢ Technical Workshops
  ➢ Shared research
  ➢ Standards discussions

➢ Ballot Early, Ballot Often
  ➢ Use ballot for feedback during development

➢ Partnerships
  ➢ Save resources of industry
  ➢ Early engagement with R&D

➢ Staff
  ➢ Staff manager
  ➢ Administrative Assistant
  ➢ Business Development
  ➢ Global offices
Programs and Services: Implementing Standards

- **Remember the Drivers and Objective**
  - Standards are your solution
  - Baseline for Industry Programs

- **Industry Programs**
  - Product Testing and Certification
  - Personnel Training
  - eLearning Modules
  - Proficiency Testing Programs

- **Consider Program Development Earlier**
  - Roadmap is developed and implement “Strategically”
  - Standards content is approached properly
  - Program components built in parallel
  - Early engagement with R&D, Innovation Institutes, CoE’s
Can’t Stop With the Plan

➢ Biggest problem with strategic planning is losing momentum with implementation
➢ The hard truth is that the best plan is the one that actually gets implemented
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Achieving SUCCESS

➢ Simple and clear
➢ Use target dates
➢ Must have accountability
➢ Regularly review progress
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Measuring Progress

➢ Return to implementation plan
➢ Hold people accountable to assignments
➢ Execute corrective action and adjust schedules
➢ Reward accomplishments
Incorporating Planning into Committee Structure

- Force planning as a priority
- Function of Executive Subcommittee or Ad Hoc Group
- Regular communication with committee members
- Need to know the pulse of the industry – solicit external input if needed
- Use staff resources
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Conclusion

➢ Start with an Executive Subcommittee Webex
➢ There are different ways to accomplish a goal
➢ Don’t underestimate actual requirements
➢ Flexibility, Flexibility, Flexibility
Questions?

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THANK YOU!