Strategic Planning & New Activity Development

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www.astm.org
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
Strategic Planning

- Current Status: Strengths, Weaknesses, Needs
- Define future directions, objectives and priorities
  - Short, mid and long-term strategies
- Develop goals to meet objectives
  - Accountability, milestones and benchmarks
- Implementation
  - Incremental progress
- Evaluation
  - Review and revise plan
Strategic Planning

Considerations

➢ Needs of a specific industry / committee
  ➢ Safety, quality, efficiency

➢ Stage of committee or activity
  ➢ New, mature, innovating

➢ Desired end goal: utilization of standards
Strategic Planning

What are your Needs?

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

➢ Review Membership: *Identify who is there & who is missing*

➢ Leverage Executive Subcommittee for Contacts
  ➢ Outreach Strategy

➢ Develop Materials to supplement personal outreach
  ➢ Committee promotional materials
  ➢ Invitation letter
Increased Awareness & Acceptance of Standards

➢ Develop Communications Strategy
  ➢ Committee promotional materials
  ➢ Press releases and social media posts
  ➢ Committee Presentation Template for consistent messaging

➢ Ask Trade Associations to amplify ASTM press releases to their membership
Strategic Planning

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
### Standard Roadmapping Considerations

<table>
<thead>
<tr>
<th>What are the biggest concerns facing regulators?</th>
<th>What are most prominent concerns for consumers/users?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Safety?</td>
<td>Integration, Accessibility?</td>
</tr>
<tr>
<td>Reliability?</td>
<td>Labeling, Training, Certifications?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>What are the biggest financial challenges of manufacturers?</th>
<th>What are the biggest challenges of laboratories?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product conformance to state programs? Components?</td>
<td>Homogenous samples?</td>
</tr>
<tr>
<td>Increase costs for production?</td>
<td>Variability of test methods?</td>
</tr>
<tr>
<td>Audits and Sampling?</td>
<td>Apparatus / device variability?</td>
</tr>
<tr>
<td></td>
<td>Reporting requirements?</td>
</tr>
</tbody>
</table>
Strategic Planning

Impact Success

➢ Mirror Roadmap Sections to Subcommittees
➢ Consider the Two Approaches for Short and Long Term Priorities
➢ 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
Strategic Planning

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
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Programs and Services: Implementing Standards

➢ 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

➢ Remember the Drivers and Objective
  ➢ Standards are your solution
  ➢ Baseline for Industry Programs
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.
Strategic Planning

Achieving SUCCESS

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

➢ Return to implementation plan
➢ Hold people accountable to assignments
➢ Execute corrective action and adjust schedules
➢ Reward accomplishments
Strategic Planning

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
Strategic Planning

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!