

# Real-time Strategic Planning in Uncertain Economic Time

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Digital Now 2009  
Orlando, FL USA

# Today's Learning Outcomes

- How to help your Board make difficult decisions while navigating the current economic environment
- What to do and what not to do when developing a contingency plan
- How to leverage your organization's strength during the downturn to be stronger when the economy recovers

# IEEE in 30 Seconds

- Global Non-Profit Professional Association
  - 384K members, 300 sections, 1200 chapters, 1600 student branches; 170+ countries
  - 1-3% annual average membership growth
- Global Standards
  - Over 900 global standards
  - 802.11, Firewire, National Electrical Safety Code
- Conferences and IP
  - 132 Periodicals; Over 2,000,000 articles in Digital Library
  - Over 800 Conferences
  - Most frequently cited content in technology patents
- Global Organization
  - **regional offices/service centers in China, Singapore, Taiwan, Japan, and the United States (4)**

# The Shameless “Self” Promotion

- Mark your calendars
  - IEEE’s birthday is 13 May
  - 125 Years of Celebrating the Future Day
  - [www.ieee125.org](http://www.ieee125.org)

# We Have a Strategic Plan...

## IEEE Envisioned Future

IEEE's core purpose is to foster technological innovation and excellence for the benefit of humanity.



### CORE VALUES

- ▶ **Service to humanity:** leveraging technology and engineering to benefit human welfare; promoting public awareness and understanding of the engineering profession.
- ▶ **Peer-reviewed:** using unbiased information to enhance the quality of life for all people.
- ▶ **Global focus:** supporting and embracing the global nature of and need for technical work and engineering solutions.
- ▶ **Intellectual activity:** forward-thinking; nurturing new and existing science and technology.
- ▶ **Growth and nurturing of the profession:** encouraging education as a fundamental activity of engineers, scientists and technologists at all levels and at all times; ensuring a pipeline of students to preserve the profession.
- ▶ **Collaboration and community building:** cultivating active, vibrant and honest exchange among cross-disciplinary and interdisciplinary global communities of technical professionals.
- ▶ **Professionalism:** creating a world in which engineers and scientists are respected for their exemplary ethical behavior and volunteerism.
- ▶ **Trust and respect:** promoting a culture where contributions at all levels are valued; encouraging member driven, volunteer-led, knowledge-based projects; building effective volunteer/staff partnerships.

### BIG AUDACIOUS GOAL

Be essential to the global technical community and to technical professionals everywhere, and be universally recognized for the contributions of technology and of technical professionals in improving global conditions.

#### Vivid descriptions of the goal:

- ▶ The IEEE community and its technologies will positively impact global prosperity and quality of life.
- ▶ Governments will increasingly seek IEEE's input as an unbiased source of technical information.
- ▶ Industry will recognize and value IEEE thereby strongly supporting professionals' participation in IEEE.
- ▶ Communities around the world will universally recognize and appreciate the profession and IEEE's role.
- ▶ Technological literacy will prevail among all educated citizens.
- ▶ IEEE members will have productive, distinguished and rewarding careers. Increasing numbers of students will choose careers in IEEE fields of interest.
- ▶ IEEE will be recognized as a global force in shaping education and curricula in IEEE fields of interest.
- ▶ IEEE will be a center of excellence in technology information and a global force in intellectual property rights management.
- ▶ IEEE members will universally find value in active engagement and involvement in the organization.

### 3-5 YEAR GOALS

- ▶ Industry professionals and their employers will value IEEE as a major resource to achieve success.
- ▶ IEEE will improve the professional competencies of students and professionals through education.
- ▶ IEEE will increasingly be valued by the global community as a catalyst for a balanced dialogue on technology-related issues.
- ▶ The public will increasingly value the role of IEEE and technical professionals in enhancing the quality of life and the environment.
- ▶ IEEE members will increasingly find value and enjoyment through their involvement in the organization.
- ▶ IEEE will operate as a model global association, with aligned purpose, energy, and infrastructure that facilitates the development and execution of coordinated strategy.

#### Key Terms:

**Envisioned future** conveys a concrete, but yet unrealized, vision for the organization.

**Core values** are the essential and enduring principles that guide IEEE.

A **'big audacious goal'** is a form of a vision statement used in strategic planning that describes a clear and compelling catalyst that serves as a unifying focal point of effort.

**Vivid descriptions** are descriptions of what it will be like to achieve the big audacious goal.

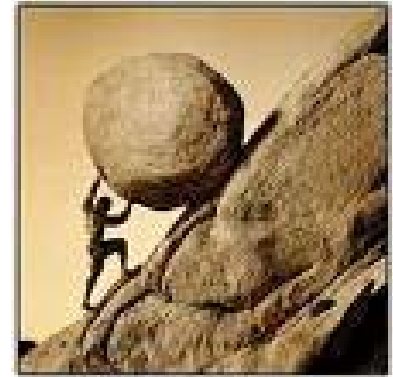
November 2007

# But We Have a Burning Platform

- Yes, the IEEE is successful by many measures of performance
- For IEEE: everything is important so nothing is important
- The uncertain economic times gives us an opportunity to decide what truly is most important



# Internal Challenges Loom... (Good is the Enemy of Great)



- Strategic interests are concentrated in functional silos, often fortified by territorial friction among members, volunteer leaders and the professional staff
- Internal cooperation, collaboration and coordination are key required themes
- Clarification as to who has what roles, with what responsibilities, accountabilities and the authority to act is critical

# Board Challenge

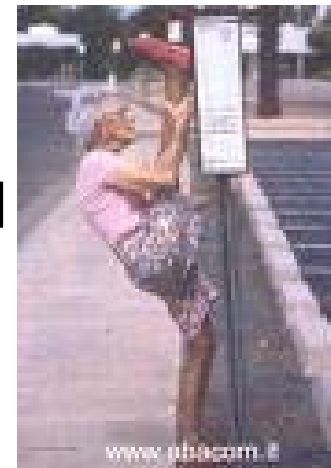


- It is not unusual for Boards to defer to “business as usual” during turbulent times because the routine work of the Board is mapped out well in advance

# From Strategic Planning to Real-Time Strategic Thinking...



- IEEE is trying to focus on our actual business, not on the activities that support our actual business
- IEEE is trying to devote more time focused on defining, developing and delivering strategic programs and less time on the process and procedures of governance
- IEEE is trying to develop an institutional ability to adapt to change in the environment and make change in the organization effectively, efficiently and with agility.



# Prioritizing is Priority #1



- New valued programs, products and services for members at every stage of their career
- Figure out what to stop doing so we can do more of the above
- Identify where partnerships should be cultivated not only to help now, but to be sustained for the long term
- Increased public visibility and promotion of the profession and the IEEE brand
- Contingency Plans

# The Bottom Line



- Help your Board make difficult decisions in the current economic environment
    - Shake up “business as usual”
    - Ask the right questions
    - Engage Directors in dialogue about challenges, opportunities and options to address these
  - When developing contingency plans
    - DO preserve and invest in what’s core and valued
    - DO abandon what’s marginal and not valued
    - DO NOT rip out your heart and soul
  - Leverage your organization's strength during the downturn to be stronger when the economy recovers
- 11 – Know what you do best and do more of it

# So What's Your Situation?

■ Is the wolf at the door?



■ Opportunity knocking?



# Are You Asking the Right Questions?

- Who are you serving?
- Are you relevant?
- Is your view of the market realistic?
- Are you taking the “new conditions” into account?
  - Can you take advantage of the pain our competitors are experiencing?
  - Can you exploit the current “glut of talent?”
  - Can you capitalize on today’s opportunities to end up stronger tomorrow?
- Are you anchored in traditional thinking or are you doing new thinking?



Let's Talk...