



Achieving Sustainable Productivity
Meeting Customer Demand in an Unpredictable World



Volunteer Leadership Workshop at 2011 APICS International Conference & Expo




Volunteer Leadership Workshop



Strategic Planning and Membership Retention

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Overview

- Roadmap for Success
- Strategic Planning for Member Retention
- Case Study
- Conclusion and Resources

Roadmap for Success

1. Setting the Course
2. Standardizing Roles and Setting Ground Rules
3. Leadership Recruiting
4. Produce and Measure
5. Results-Driven Management



Roadmap for Success

A GPS for Successful Chapter Volunteer Leadership and Results



Step 1— Setting the Course

- Align volunteer chapter leadership through integrated planning
- Establish long-term and short-term plans and validate with results and membership feedback
- All plans should cover at minimum
 - Membership
 - Education
 - Finances
 - Administration



Step 2—Standardizing Roles and Setting Ground Rules

- Key is to know what is needed and know who’s responsible for it
 - Map processes
 - Establish standard work with champion roles
 - Empower volunteers to make improvements
 - Always tie customer value in establishing processes



Step 3—Leadership Recruiting

- Compare fiscal year marketing and operations plans to current leadership offerings
- Focus on skills, not individuals
 - Discuss roles based on projects/tasks in the plans
 - List leadership characteristics required
 - List functional skills required
- Accept the best leader for the job ... don’t just fill a hole.



Step 4—Produce and Measure

- Establish no more than five SMART KPIs for strategic goals
- Create a dashboard for review at board meetings and to share with the membership
- Let metrics drive process improvements
 - “Can’t improve what you can’t see!”



Step 5—Results-Driven Management

- Involve membership!
- Root cause analysis for shortcomings
- Celebrate successes:
 - Appreciation dinners for members
 - Volunteer recognition



Strategic Planning for Member Retention

- Happy Chapter = Happy Member



Strategic Planning for Member Retention

- Communicate value of membership at all activities
- Establish plans at all planning levels for member retention
- Let members do the talking



Strategic Planning for Member Retention

- Measure retention as foundational growth and new members as organic growth
- Seek to delight returning members:
 - Recognition for years of membership
 - Members forums
 - Members-only events
 - Listen to existing members needs



The Next Adventure

- The GPS Upgrade 2.0



Recommendations for the Future— Chapter Level

- Cultivate a culture of continuous learning
- Document and share best practices
- Rely on the input of membership
- Engage the community through volunteer events
 - Put supply chain management to work!
- Try something new!



Recommendations for the Future— District Level

- Encourage learning and development of board leadership through human resource skill training
- Use best practices to focus on synergies within the district
- Model leadership profiles



Recommendations for the Future— National Level

- Focus on service industry applications of educational materials
- Use CPIM and CSCP teachings to direct chapter administration processes
- Create incentives for returning members



Conclusion

- Apply the principles of CSCP and CPIM to align the chapter with the customer
- Deliberately plan for success
- Build leadership team based on characteristic needs rather than roles/functions
- Celebrate frequently!



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THANK YOU!

