



## 2010-2012 Strategic Plan

Lynda J. Patterson, CAE, President  
Bob Lowe, Executive Director  
22 N. Carroll St, Ste 300  
Madison, WI 53703  
800-661-4914  
[lpatterson@controlsyst.org](mailto:lpatterson@controlsyst.org)  
[execdir@controlsyst.org](mailto:execdir@controlsyst.org)

# TABLE OF CONTENTS

---

1	Mission Statement and Value Proposition .....	3
1.1	Mission .....	3
1.2	Value Proposition .....	3
2	Organizational Strategic Objectives.....	3
2.1	Increase Membership through growth and retention .....	4
2.2	Increase Certification through new Certification and Retention .....	4
2.3	Expand International Membership .....	4
2.4	Increase Awareness of CSIA Value by End-users.....	4
3	Functional Objectives.....	5
3.1	Executive Director .....	5
3.1.1	Deliver a successful Annual Conference .....	5
3.1.2	Provide value to our Members between conferences.....	5
3.1.3	Oversee a Certification Audit process of the highest integrity .....	5
3.1.4	Promote the Association to prospective members.....	5
3.2	President .....	6
3.2.1	Deliver a profitable Annual Conference .....	6
3.2.2	Provide sound Association Management.....	6
3.2.3	Establish and execute effective marketing campaign .....	6
3.2.4	Facilitate and foster a strategic approach to association leadership .....	6
3.2.5	Facilitate communication among members between conferences .....	6
3.3	Executive Committee .....	7
3.3.1	Improve Membership Statistics .....	7
3.3.2	Develop a first-class membership retention strategy .....	7
3.3.3	Develop a member referral program .....	7
3.3.4	Develop a standard nominations and awards process .....	7
3.3.5	Assure effective member programs and services.....	7
3.3.6	Best Practices .....	7
3.3.7	Partners.....	7
3.3.8	Marketing.....	7
3.3.9	Insurance.....	7
3.3.10	Provide advice to the Executive Director and President.....	7

# 1 Mission Statement and Value Proposition

## 1.1 Mission

Our primary mission is to provide our member companies around the world with methods and opportunities to help them improve the operations of their businesses. We do this by:

- Providing business Best Practices
- Promoting the CSIA Certified brand to the users of our member companies services
- Providing an industry forum for collaboration and networking amongst members
- Providing industry-specific business education opportunities
- Providing industry-specific business insurance
- Growing the association globally

## 1.2 Value Proposition

CSIA is committed to the development of the business capabilities of control system integration companies and their implementation of best practices in order to provide a healthy, low-risk channel for the application of automation technology to their industrial clients.

# 2 Organizational Strategic Objectives

The strategy for the association is established by the EC and owned by the Association CEO, which in the case of the CSIA is the Executive Chair. Ideally each objective can be measured using one or more Key Performance Indexes (KPIs). The performance of the Executive Chair is evaluated against these objectives.

---

Project Team Role	Leader	Team
Oversee plan, incorporate check in accountability	Lynda Patterson	
Membership Growth/Retention	Bob Lowe/Joe Martin	
Best Practices	Jeff Miller	
International	Bob Lowe	
Marketing/Outreach	Lynda Patterson	

---

## 2.1 Increase Membership through growth and retention

Description: Grow CSI Membership from 285 to 405 by the end of 2012. Grow Total Partner Members from 50 to 80 by the end of 2012.

KPIs: CSI Membership Count, Total Membership Count of 485 by the end of 2012  
YTD: 348

## 2.2 Increase Certification through new Certification and Retention

Description: Grow the number of Certified Members from 95 to 150 by the end of 2012. (Currently 33% of integrator members, up to 37%)

KPI: Certified Member Count  
YTD: 85 (down)

## 2.3 Expand International Membership

Description: Grow the number of International Members from 50 to 65 by the end of 2012. (currently 18 in Canada and 32 outside North America)

KPI: International Member Count (non-US members)  
YTD Canada 18  
YTD international 37

## 2.4 Increase Awareness of CSIA Value by End-users

Description: Increase the number of Partners who differentiate their Solution/System Partners based on CSIA Membership and/or Certification. Determine how to measure KPIs.

KPI: Differentiating Partner Count, Certification-only Partner Count, CSIA Bid Specification Count, engagement scores of Find An Integrator on the connected community site, other web metrics (usage, access to specific areas, links, blogs, etc)

Executive Chair Tactics (global, covering all strategic objectives)

- Establish functional objectives for the President, Executive Director, and EC that are suitable (will they work?), feasible (can we make it happen?), and acceptable (will we work it?).
- Establish charters for each committee (prior to 2010 conference).
- Establish a model working agreement with FEDA that can be used for future international association partners (complete prior to 2010 conference).
- Personally contribute weekly to the Web 2.0 community.
- Make phone/video contact with each EC member and committee chair at least once per month (in addition to the EC conference call and emails).
- Review association expenses within the week received.

## 3 Functional Objectives

The Chair understands that the Executive Director, President, and the EC all play different, critical roles in achieving the strategic objectives. The Executive Chair is responsible for establishing functional objectives for the Executive Director, President, and EC. These functional objectives reflect the different roles, responsibilities, and authorities of the three, while aligning with the overall strategy of the association. Each of the three owns their individual objectives. The performance of each is evaluated against their Functional Objectives.

For each Functional Objective, one or more tactics are identified. Tactics are specific actions to be taken which will support the objective and are tracked separately by the Executive Director and President.

### 3.1 Executive Director

#### 3.1.1 Deliver a successful Annual Conference

Description: Deliver a conference that rates a 4, on a scale of 1-5, based on a survey of all conference attendees.

KPIs: Conference Program Rating: 3.5/42010 overall  
Conference Best Practices Document Complete

#### 3.1.2 Provide value to our Members between conferences

Description: Increase the number of member 'touches' between conferences. Increase the number of members in the connected community with completed profiles from 0% to 50% by the end of 2010.

KPIs: Ratings on webinars and other "touches" to members  
Integrator members visited each year: YTD 4  
Partner members visited each year: YTD 2 plus partner mtg  
New "values" to Integrator members each year  
Engagement in Connected Community

#### 3.1.3 Oversee a Certification Audit process of the highest integrity

Description: Work with the staff to maintain accurate records of Certified members. Oversee the activities of the auditors to be assured of parity and compliance with CSIA requirements.

KPIs: Audits attended each year – Loman audit  
Accurate Certification records – 95% there

#### 3.1.4 Promote the Association to prospective members

Description: Perform activities that promote an increase in new members.

KPIs: Attend trade shows: 1  
Attend Partner events: 5  
Generated leads: not tracked

## **3.2 President**

### **3.2.1 Deliver a profitable Annual Conference**

Description: Utilizing best practices, marketing, communication and negotiation skills, deliver a profitable annual conference.

KPIs:	Attendance	354 (318 in 2009)
	Exhibitors	35 (36 in 2009)
	Revenue	\$264,000
	Expense	\$235,000

### **3.2.2 Provide sound Association Management**

Description: Continuously improve operations and member service to meet or exceed member expectations.

KPIs:	Clean financial audit by outside auditor – clean audit for 2009
	Member satisfaction – need to do another member survey

### **3.2.3 Establish and execute effective marketing campaign**

Description: Increase International Association partners from 0 to 3 by 2012. Publish 6 CSIA focus articles annually. Increase 'Find an Integrator' hit rate monthly by the end of 2010.

KPIs:	International membership growth
	Membership growth YTD +19 members
	Membership retention
	Engagement scores in connected community
	International Partners – YTD 1 (FEDA)

### **3.2.4 Facilitate and foster a strategic approach to association leadership**

Description: Provide strategic and innovative leadership to CSIA, introducing new concepts and ideas.

KPIs:	Leadership and recognition in association management – 2010 named a Fellow of the American Society of Association Executives (ASAE); also named vice chair of the Executive Management Section (11,000 members of ASAE) – will be chair next year
	New ideas or innovations introduced – working on leading certification learning management system for CAE certification

### **3.2.5 Facilitate communication among members between conferences**

Description: Increase community engagement scores from each quarter (show continuous improvement). Maximize communication tactics to include social media.

KPIs:	Engagement scores
	Communication channels, mode

### **3.3 Executive Committee**

#### **3.3.1 Improve Membership Statistics**

#### **3.3.2 Develop a first-class membership retention strategy**

#### **3.3.3 Develop a member referral program**

Description: Generate 150 referrals by the end of 2012.

#### **3.3.4 Develop a standard nominations and awards process**

#### **3.3.5 Assure effective member programs and services**

#### **3.3.6 Best Practices**

#### **3.3.7 Partners**

#### **3.3.8 Marketing**

#### **3.3.9 Insurance**

#### **3.3.10 Provide advice to the Executive Director and President**