



**THE ORGANIZATION OF CHOICE FOR
PROJECT MANAGEMENT PROFESSIONALS**

PMINJ STRATEGIC PLANNING 2019

SESSION 1: NOVEMBER 17, 2018

SESSION 2: TBD

PMI NJ Vision

2

Champions for project management professionals

#pminjchamp

Guiding Principles

3

1. Promote the PMINJ Chapter as a member-focused organization.
2. Provide opportunities to PMINJ members to enhance their professional growth in the field of Project Management.
3. Maintain a sustainable chapter infrastructure.

President's Areas of Focus

4

2018 Areas of Focus

Chapter Initiatives

- ***Growth***
 - ***Millennials***
 - ***Member engagement***
 - ***Sponsorship support***
 - ***Partnerships***
- ***Outreach***
 - ***Chapters***
 - ***Corporate***
 - ***Community***
 - ***Within PMINJ***

2019 Areas of Focus

Chapter Initiatives

Growth

- ***Attract new member, especially Millennials***
- ***Retain Members***
- ***Sponsorship support***

Strategic Objectives

5

1. PMINJ Growth: Membership, Millennial Membership, Member Engagement, Sponsorship, & Partnerships
2. Engage and develop members in the Project Management profession
3. Increase the value of PMINJ membership
4. Provide an environment that promotes collaboration and networking
5. Increase awareness of PMINJ
6. Demonstrate the value of applied project management practices to NJ through outreach
7. Foster mutually beneficial partnerships
8. Maintain and enhance chapter operations

Business Relationship




The strategic objectives are:

- To maintaining consistent alliance with the organizations that are currently supporting and participating in the success of PMINJ
- Identify and develop relationship with the organizations that can help PMINJ in meeting their strategic objectives and in return can benefit from the PMINJ offerings
- Solicit and manage sponsorship opportunities for the chapter and establish revenue stream so support financial well being of the chapter.
- Work with other teams internally within the chapters (like Marketing, Symposium, Program, Outreach) in order to attract sponsors for those events.
- Develop strategies to attract more sponsors for the chapters
- Provide additional services to our membership

Business Relationship

7

PMINJ (Business Relationship) – Strategic Segments

Large Organizations	Education Providers	Small Companies/Others
 <p>To build strategic / long lasting relationship</p>	 <p>Attract Universities/ REPs to showcase their services, that can benefit our membership</p>	 <p>Continue to promote PMINJ in local small companies (staffing) and other service providers</p>
<p>Strategies: Offer strategic partnership like:</p> <ul style="list-style-type: none"> •Company name/logo on our webpage •Provide access to job openings to our members •Invite senior level PM to speak at our events and write in our newsletter •Post their major events in our calendar •Provide group discount to Symposium (large events) to their employees •Allow them to have a satellite for program meetings •Provide a senior level board member to speak at their event or represent PMINJ <p>Obstacles: Senior level relationship or concerns about HR/Legal issues</p> <p>Potential Sponsorship \$: 10-20K</p>	<p>Strategies: Major Revenue stream coming from this segment Offer strategic partnership like:</p> <ul style="list-style-type: none"> •Need to think about revenue sharing model for this segment (for training PDUs) •Post their major events/PM related class advertisement in our calendar •Allow them to have a satellite for program meetings •Exchange speakers •Provide student discount (student LCI) for universities and have a liaison <p>Obstacles: Not having right contacts (due to high turnover) and focus on our part</p> <p>Potential Sponsorship \$: 5K – 10K</p>	<p>Strategies: This is cyclical segment as they participate based on their revenue/profit</p> <ul style="list-style-type: none"> •Due to budget constraint, need more flexibility -customized combo sponsorship works for this segments: e.g. Exhibitor at symposium and email blast or web-ad. •Promote their services and make it easier to post jobs on our website (for staffing companies) •Establish a liaison to contact members looking for a job to direct them to the newly open position •Should be able to provide more emails/ membership contacts <p>Obstacles: Show Value proposition</p> <p>Potential Sponsorship \$: 5K – 10K</p>

Outreach – Corporate, Community, LCIs

8

Corporate Outreach

- Corporations/Businesses
- Government – Local and State
- Professional Organizations

LCI's

• Business

- Career Networking
- Agile
- Business Analysis
- PMO (not active)

• Student

- DeVry, MSU, and Rutgers
- Stevens & Rowan - developing

Community Outreach

- Non-profits
 - Food Banks
 - Shelter - HFH
 - Boy Scouts/Girl Scouts
 - Veterans
- Education
 - High Schools
 - Grade Schools
 - Student Competitions (STEM)

Corporate Outreach - Objectives



- ❑ Re-engage with Military Outreach, learn from initial engagement, hone message, expand to more bases/locations
- ❑ Find and build relationships with 10 or more new Corporations where our chapter and their company will benefit (partner with Business Development)

Corporate Outreach - Operations

- Maintaining & Growing team relative to demand of activities
- Monthly execution and progress calls
- Attendance by team members at monthly chapter meetings (internal lead generation)
- Work leads through the Sales Cycle
- Continual updates to SharePoint
- Events calendar
- Presentation Library

Community Outreach - Objectives

11

- Increase outreach opportunities
 - Schools/Youth
 - Develop program for Girl Scout Gold Projects – Reach out to Troops
 - Develop and Deliver PM related program for school age youth [K-12]
 - Charitable Organizations
 - Continue relationship with Tour de Franklin
 - American Heart Association
 - Food Pantries
 - Formalize food collection/relationships with NJ food pantries
 - Organize a volunteer event for PMINJ Members
 - Housing
 - Habitat For Humanity – establish a regular (at least bi-annual) Habitat For Humanity Event
 - Veterans
 - Establish relationship with one or more organizations

Community Outreach - Operations

12

- Maintain Outreach Relationships
 - Name Team Leaders to Each Organization
 - Schools/Youth
 - Continue with Boy Scouts for Eagle Projects – Expand to Troop Meetings
 - Future Cities Competition – Presenting, Judging, PM Career Table
 - Food Pantries
 - Continue with participation in the Tour de Franklin event
 - Food drives at Symposia/Program meetings

Outreach - LCI's

13

❖ Strategy 1: Expand role of LCI's in Chapter

- Objective #1: Focus on Student LCI's - bring in the Millenials
- Objective #2: New opportunities for CN and Agile LCI's - expand focus
- Objective #3: Re-invigorate BA LCI
- Objective #4: Decommission PMO LCI
- Objective #5: Develop method(s) for members to suggest new LCIs

❖ Strategy 2: Increase member participation in LCI's

- Objective #6: Leverage Chapter channels to increase participation in monthly LCI events before Monthly Meetings

Professional Development - Training

14

- **Provide project management-related learning opportunities (SO # 1, 2, 3, 4, 5, 6, 7 & 8)**
 - **Increase training offerings**
 - Certification (PMI and non-PMI)
 - Non-certification (based on PMI Talent Triangle)
 - **Develop affiliate agreements**
 - Training topics
 - Products
 - **Extend engagement with project community**
 - Explore methods
 - Explore platforms
 - **Develop training team**

Professional Development – Mentoring

15

- **Provide mentoring services to PMINJ members (SO # 1, 2, 3, 4, 6 & 8)**
 - **Expand the mentor program**
 - Increase number of mentees
 - Explore additional mentoring opportunities
 - **Prepare the mentor program for growth**
 - Improve the support process
 - Increase the number of support team personnel
 - **Improve engagement with mentors**
 - Improve capability of mentors
 - Develop a structured lessons learned process

Marketing (1 of 3) - 2019 - YEAR OF OUR BRAND

- COHESIVE VISUAL STYLE - WHAT DRAWS/ATTRACTS? - LESS “WE ARE A GROUP OF PMs...” MORE “WE ARE A SERVICE & A VALUE...” - WHAT SETS US APART? - THINK PAST THE PDUs

16

Increase Chapter recognition and visibility (SO#1,2,4&5)

- Update and enhance communication media options
- **Tactics:**
 - Create an integrated Chapter Marketing Plan - reaching out to the other sections to further define and enhance our brand.
 - Continuously collect, curate and communicate content - seek outside partnerships, PM/biz roundtable video podcast.
 - Use PMI channels and resources (e.g., Chapter news in PMI Today, PM Network) - need to forge these relationships, find something PMI-G needs and meet it.
 - Use Local Media (e.g., NJ biz.com) - other biz-oriented portals.

Promote Chapter image and brand (SO#1,2,4&5)

- Expand internal and external presence: website/social media/brochures/videos/podcasts
- **Tactics:**
 - Develop and integrate consistent “Look & Feel” - defining our brand.
 - Continue Website update - UX UI Rachel Margolis, Cafepress
 - Transition newsletter to monthly blasts linking to content on social media - have been transitioning to this format, finding a new editor.

Marketing (2 of 3)

17

Advertise and promote chapter events using customized campaigns (SO#1,2,4,5&7)

■ *Internal strategy*

- Work with Board members to define needs and opportunities and develop marketing campaigns to support their requirements
- Maintain and expand use of Social Media and Website
 - *Increase members on LinkedIn by 5%*
 - *Increase “Likes” on Facebook by 10%*
 - *Post events, volunteer positions on social media - we need to get pre-defined needs for our volunteer opportunities.*
 - *Initiate discussions on various PM topics on social media - podcast to Reddit.*
- Explore use of new Channels, e.g. YouTube, Instagram, podcasts, Meetups
- *Tactics:*
 - *Recruit Marketing Program PM volunteers to support each VP area*
 - *Develop tailored marketing programs and campaigns - college student unions & business pro. groups, veterans*
 - *Engage VPs in sharing team goals and priorities via video clips - welcome to chapter/PMINJ promo video - we are the face of PMI*
 - *Create more social opportunities - Meetup to attract millennials with an approach that has simple expectations (networking).*
 - *Develop and maintain a marketing calendar - will be lockstep with Lisa’s Symposium*

Marketing (3 of 3)

18

Advertise and promote chapter events using customized campaigns (SO#1,2,4,5&7) (cont.)

■ **External strategy**

- Find new ways to promote the profession externally

■ **Tactics**

- **Support Corporate, Academic and LCI Outreach activities - need to promote LCIs as a service we provide, find those Academic & Corporate connectors that will evangelize the brand.**
- **Establish alliances with external media outlets**
- **Build relationships with complementary professional organizations and neighboring R4 Chapters - PMINYC would love to cross-promote and work with us - should promote each others calendars.**
- **Continue to build alliance with PMI Marketing - we have to find an alliance first.**

Membership 2019

19

- ❑ **Improve Member Experience (SO#1, 2 & 3)**
 - **Continuous Improvement of Member Service Center**
 - Appoint leader to ensure all weeks are covered
 - Implement Member Services form to enable better statistics
 - continuous improvement leveraging monthly statistics
 - **Formalize Membership Team presence**
 - Continue to sponsor tables at large events
 - Add membership volunteer and have consistent table at monthly events

Membership 2019

20

- ❑ **Retain Existing Members (SO #2 & 3)**
 - **New Member welcome calls**
 - Continue welcome calls
 - Refine welcome calls with script
 - **New Member Orientation**
 - Continue including coordinators to tie-in with On-site team and find improvements to ensure NMO attendance
 - **Renewal calls**
 - Continue renewal reminder calls
 - Continue calling members who dropped PMINJ and retained PMI global

Membership 2019

21

- ❑ **Retain Existing Members (SO #2 & 3) – cont'd**
 - **Establish inactive member calling campaign**
 - **Contact members who have been inactive to encourage them to become active**
 - **Data mining to roughly identify these members**
 - **Perform data mining to assist with:**
 - **targeting satellites, meeting locations, meeting types, LCIs, career fairs**
 - **Confirm effectiveness of new recent-member initiatives**
 - **Explore other avenues to improve retention**

Membership 2019

22

☐ **Attract New Members (SO# 2&3)**

- Attract student members thru collaborations with colleges
- Attract Emerging Professional Members with appropriate reach outs including students and interacting with Marketing and Programs to set up events
- Leverage new PMINJ Advisory Board to increase membership
- Explore incentives for current members to bring in new members
- Systematize outreach to Prospective Members

Recognition

23

Member Recognition Program (SO #2)

Recognition of long standing member's anniversary (5, 10, 15, 20 .. yrs)

- *Identify members who have reached significant milestones and publish on PMINJ website.*

Scholarship

- *Support the renewal process*
- *Implement a revised scholarship undergrad program*
- *Research scholarship for members in a master's Project Management program*
- *Look into expanding scholarships to local colleges*

Recognition

24

Volunteer Recognition Program (SO # 1-3)

Annual Volunteer Appreciation event

- *Recognize all active volunteers*
- *Encourage participation, advertise at monthly meetings, email blast, social media, website*

Volunteer of the Quarter

- *Recognize active volunteer for outstanding support for the quarter*
- *Encourage recognition of volunteers for outstanding performance*

Volunteer of the Year

- *Recognize active volunteer for outstanding support for the year*
- *Encourage recognition of volunteers for outstanding performance*

Team Awards

- *Recognize our teams for work beyond the call of duty.*

Recognition

25

Volunteer Management (SO # 1-3 and 6)

Volunteer System Support (VOS)

- *Support Directors and VPs on open opportunities*
- *Continue to support and monitor the On-boarding, transitioning and Off-boarding process for the new Chapter Director/VPs as well as volunteers*
- *Maintain the Volunteer Master list*

Volunteer Recruitment

- *Increase Volunteer Recruitment by 10%*
- *Connect with members and advertise at Monthly meetings, PMINJ Events, Satellites*
- *Continue to meet with VPs to discuss open opportunities*

Recognition

26

Project Manager of the Year Award (SO #5)

Award project manager of the year

- *Implement improvements from lessons learned*
- *Continue to advertise: short video, monthly meetings, email blast, social media, website, newsletter, LCI meetings, other NJ professional chapters and Outreach and Business Relationship contacts.*
- *Announce winner at May Symposium*
- *Present award at IPM Day*

Project of the Year Award (SO #1-3)

Award project of the year

- *Implement improvements from lessons learned*
- *Continue to advertise: short video, monthly meetings, email blast, social media, website, newsletter and LCI meetings.*
- *Announce winner at May Symposium*
- *Present project and award at IPM Day.*

Symposium

27

Overall:

- Produce signature professional development events for continuing educational and career growth opportunities, that are relevant and add value for a broad age demographic (SO #1-5)
- Deliver Symposium and IPM Day events that increase positive recognition for the PMINJ brand and continuously improve revenues, registration, and overall PMINJ member satisfaction (SO #1-5)

Speakers:

- Improve speaker selection using a continuous Symposium/IPM Day speaker review process (SO #1-5)
- Identify relevant themes and speaker candidate sources by proactive engagement with PMINJ leadership teams (e.g., Membership, Outreach, Programs, Professional Development, and Recognition) and other professional and industry organizations (SO #1-5,7)
- Enhance IPM Day agenda through continued engagement with Recognition for “Project of the Year” and “Project Manager of the Year” (SO#1-3,5)

Symposium (cont.)

28

Facilities:

- Leverage use of new Symposium/IPM Day venue to enhance event experience (SO #1,3-5)
- Partner with Business Relationships to attract both sponsors and vendors (SO #7,8)
- Plan Symposium/IPM Day breaks to enhance attendees' awareness of Chapter services and volunteer opportunities, exhibitor interactions, and networking (SO #1,3-5)
- Continue exploring facilities for Symposium for more than 600 attendees (SO #1,2,4,5)

Symposium (cont.)

29

Operations:

- Facilitate Symposium teams' coordination and communications through consistent use of event work plans and risk register (SO #2,4,8)
- Develop targeted marketing campaigns to increase registration (SO #1,5,8)
- Achieve and sustain 85% or higher member satisfaction ratings (SO #1-5)
- Pursue opportunities to decrease expenses and streamline processes (SO #7,8)

Programs 2019

30

- ❑ Identify and fulfill members' professional development needs (SO#1, 2 & 3)
- ❑ Deliver nine Monthly dinner meetings with speaker presentations
 - Enrich monthly program structure
 - Deliver 2 presentations focused on millennial preferences
 - Enhance main location features
 - Increase interaction
 - Provide more “modern” dinner choices
 - Expand satellites sites by at least 1

Programs 2019

31

- Provide mixture of basic and advanced topics balanced across the talent triangle for monthly meetings (SO#1, 2, 3 & 4)
 - Deliver balanced PDU content
 - Conduct one collaborative program event with another organization

Programs 2019

32

- Expand variety of program events (SO#1, 2 & 3)
 - Social / Networking Events
 - 2nd Spring Nature Ride, food drive
 - Ecology walk (icw Somerset County Environmental Education Center)
 - Volunteer Day – supporting a local 501(c)3
- Revive PIT (Project Managers in Transition)
 - Align with Business Relationship and/or Outreach
 - Look for socially relevant opportunities

Programs 2019

33

- Develop and leverage regional, national and global opportunities (SO#4)
 - Increase the name recognition of PMINJ Programs and Chapter activities
 - Generate one invitation from an affiliates organization to collaborate or present
- Initiate Women in PM Interest Group
 - Outgrowth of interest in inclusion, diversity

Programs 2019

34

Grow PMINJ footprint

- Leverage connections with local government as presenters
- Increase the number of posts on LinkedIn site

PMINJ TV

- Invite members to submit videos
- Potential for “best in class” type voting and awards
- Start the “PM Perspectives” interview series
 - Short video pieces with speakers, industry thought leaders, members

Finance

35

Maintain financial stability (SO#7)

- *Review and reconcile accounts on monthly basis*
- *Monitor annual expenses against income actuals semi-annually*
- *Goal is to remain financially viable*

Provide Board and Volunteer Financial Incentives for their service (SO#3&7)

Explore options to provide incentives to our volunteer and Board members (e.g. % discount off of registration costs for events/meetings)

- *Semi-annually- review proposed volunteer incentives (e.g. % discount off of registration costs for events/meetings)*

Finance

36

Support NJ Chapter members (SO#2)

Maintain membership fees at current rates

- *Chart historical rates and comparison against other chapters - Ongoing*

Support members and volunteers(SO#4)

- *Provide financial support for various activities such as workshops, monthly meetings, career fairs, and discounts to other chapters' events.- Ongoing*

Administration

37

Ensure Strategic and Tactical Plans defined, approved and published (SO #7)

- *2019 Strategic and Tactical Plan Dashboard will be created and published after Board meetings.*

Improve processes for managing strategic plan (SO#7)

- *Implement the process for building and tracking the Portfolio of Projects for 2019*
 - *Identify initiatives*
 - *Prioritize*
 - *Approve*

Maintain chapter operations (SO #7)

Operations Handbook – Update as needed and yearly update in January.

- *On-Going*

Chapter charter renewal

- *Meet PMI deadlines / requirements*

Administration

38

Administer surveys (SO #2&3)

Centralized repository for all survey information

- *Maintain centralized repository and populate with all survey related data from all VP areas*

Analytics and reporting

- *Generate appropriate reports to facilitate analysis and recommendations*

Administer surveys

- *Continue to work with other VP areas to create and administer surveys*
- *Work with other VP area in the development and execution of action plans based on survey feedback*

Administration

39

Achieve PMI recognition (SO #2)

PMI Chapter Excellence Awards

- *Plan and work toward achieving excellence without compromising our core objectives*

PMI Community Awards

- *Plan and work toward achieving excellence without compromising our core objectives*

Strengthen alliance with PMI & Region 4 (SO #6)

- *Host a Region 4 event*