Strategic Plan
2019-2021
Introduction
The CLMA Board of Directors developed this strategic plan during a strategy session on October 9, 2018. The plan provides a roadmap through 2021 that creates focus in order to align CLMA resources for maximum impact. The Board agreed on four strategic goals that will have a significant impact for CLMA and position the organization to meet the future needs of clinical laboratory managers. The Board also created objective statements to focus the organization’s work toward these goals. Members of staff subsequently identified short- and mid-term action steps to work towards achieving those goals and objectives based on conversations during and after the strategy session.

Strategic Plan Definitions
The following are brief definitions for the terms used within this strategic plan document.

**Strategic Goals:** A broad outcome statement based on a critical issue that requires attention, focus and action. It must have significant and meaningful impact on our ability to realize our mission.

**Objectives:** A precise and measurable statement of what will be done to support the achievement of a strategic goal.

**Action Steps:** Specific tasks or projects critical to achieve the objectives and overall strategic goals.

**CLMA Strengths**
A strong strategic plan is grounded in the organization’s mission and vision statements and builds on its inherent strengths. The Board identified CLMA’s current strengths as:

- The Body of Knowledge
- Industry expertise
- Members who are willing to share ideas and experience
- Networking opportunities provided to members
- Genuine collegiality and bonding of members
- Having a strong brand for leadership
- Offering strong education
- Market demand for the skillsets CLMA helps develop
Future Planning Process
In order for CLMA to stay focused on its strategic goals, vision and mission, the Board of Directors must work with staff to monitor progress towards achieving these objectives, and adjust the plan based on changes to the environment or barriers to success. A quarterly dashboard to monitor progress, and an annual strategy session to develop new action items and ensure the plan remains relevant, are our recommended best practices.

CLMA 2019-2021 Strategic Goals and Objectives

**Strategic Goal 1: Education, Mentorship & Networking**
CLMA will encourage laboratory professionals to aspire to be more effective leaders by providing education, mentorship and networking opportunities.

**Strategic Goal 2: Strategic Partnerships and Advocacy**
Position CLMA as the premier authority for laboratory leadership in the healthcare industry by establishing strategic partnerships and advocating for the profession.

**Strategic Goal 3: Value Proposition**
Review and refine the existing value proposition to ensure relevance for laboratory leaders at all phases of their career, including by operationalizing the Body of Knowledge.

**Strategic Goal 4: Evaluate International**
Evaluate opportunities to provide existing products and services to lab leaders internationally, especially by partnering with allied organizations.
Strategic Goal 1: Education, Mentorship & Networking
CLMA will encourage laboratory professionals to aspire to be more effective leaders by providing education, mentorship and networking opportunities.

Objective 1
Evaluate current educational offerings, identify gaps, and package curriculum for aspiring leaders.

**Action Steps**
- Tag existing education by content level as essential or advanced
- Identify gaps in existing education for aspiring leaders (content and delivery method)
- Evaluate product packaging/bundling by domain and content level

By December 31, 2019

Objective 2
Evaluate the effectiveness of the piloted mentorship program and make recommendations for improvements.

**Action Steps**
- Survey participants and collect staff feedback from piloted mentorship programs in 2016 and 2017
- Prepare a report to the Board of Directors with a recommended program

By December 31, 2020

Objective 3
Explore options to develop a program to facilitate local networking opportunities at the chapter level based on knowledge gained in Objective 2.

**Action Steps**
- Review recommended program for implementation at the chapter level
- Design a program intended for Chapter Leaders to execute at the local level
- Develop implementation plan to rollout to chapters

By December 31, 2021
Strategic Goal 2: Strategic Partnerships and Advocacy
Position CLMA as the premier authority for laboratory leadership in the healthcare industry by establishing strategic partnerships and advocating for the profession.

Objective 1
Identify desired outcomes and develop a structure for evaluating and creating partnership opportunities with specific entities to achieve the desired outcomes.

Action Steps
- Establish a working group to identify desired needs, outcomes and structure
- Identify targeted list of potential partners that includes industry partners to achieve desired outcomes
- Prioritize strategic approach for partner involvement

By December 31, 2019

Objective 2
Develop a framework and infrastructure to respond to issues that arise from legislative changes and communicate laboratory needs and value to the C-suite.

Action Steps
- Evaluate the effectiveness of the SIGs and the LCRC work groups via the Industry Trends Task Force
- Determine and establish infrastructure and/or potential partners to address issues that arise from advocacy changes
- Determine the role CLMA will play in advocating on behalf of the laboratory industry including communicating the value of the lab to the C-suite

By December 31, 2020

Objective 3
Evaluate initiatives related to partnerships and advocacy activities to promote CLMA as the premier authority for laboratory leadership in the healthcare industry.

Action Steps
- Evaluate the success of partnerships while tracking metrics against desired outcomes

By December 31, 2021
Strategic Goal 3: Value Proposition

Review and refine the existing value proposition to ensure relevance for laboratory leaders at all phases of their career, including by operationalizing the Body of Knowledge.

Objective 1
Define value proposition for aspiring and advanced laboratory leaders and test against existing value proposition research.

Action Steps
- Analyze member needs assessment survey results and establish plan for focus groups

By December 31, 2019

Objective 2
Teach members how to use the Body of Knowledge and promote use of the tool by institutions as well as for personal professional development.

Action Steps
- Evaluate and establish hands-on components for how to use/leverage the Body of Knowledge
- Marketing campaign to teach people how to use the Body of Knowledge

By December 31, 2020

Objective 3
Build educational programming and resources based on the Body of Knowledge domains and competencies in order to assist members in advancing from one level to another within a domain.

Action Steps
- Using outcomes identified in SG1O1 and gap analysis to identify methodology for advancements within the domain competency levels of the Body of Knowledge
- Develop a marketing campaign to launch new programming and resources

By December 31, 2021
Strategic Goal 4: Evaluate International
Evaluate opportunities to provide existing products and services to lab leaders internationally, especially by partnering with allied organizations.

Objective 1
Identify and contact strategic international or US-based partners to determine potential opportunities for supporting international laboratory leaders and leadership development by leveraging existing CLMA resources, programs and materials.

Action Steps
- Establish a working group to identify desired needs and outcomes
- Determine proposal for potential opportunities for international involvement

By December 31, 2019

Objective 2
Identify gaps in international leadership training offerings through our personal connections.

Action Steps
- To be determined

By December 31, 2020

Objective 3
Determine the organizational value of CLMA pursuing international collaborations based on knowledge gained from Objectives 1 & 2.

Action Steps
- To be determined

By December 31, 2021