

**Pipeline
Industries
Guild**



Pipeline Industries Guild 2025 Strategy Roadmap



PIPELINE INDUSTRIES GUILD



Introduction

In June 2019 the Guild Board commenced an initiative to develop a future strategy for the Guild for the next 5 years. The objective of this initiative is to create a sustainable Guild that continues to deliver cutting edge technical events, enjoyable and engaging social events but can also adapt to meet the challenges our industry continues to present.

To launch the initiative a workshop was held in September 2019 to provide a consultation process to which all members of the Guild were invited. Its purpose was to gain an insight into the members aspirations for the Guild's future and determine the workshop outcomes to establish the future five year strategy for the Guild.

The Guild Executive reviewed all the workshop outputs and grouped them into six specific areas to aid the development of our future strategy. The next stage was to develop roadmaps for each area and this has been achieved by the establishment of working groups with a member of the Executive leading on one of the individual topic areas.

The six working groups have developed workstreams with high level deliverables, specific delivery models and time scales for each of the individual areas of the strategy. Details of each of the working groups areas provided on the attached spreadsheet

Document Guidance:

PLEASE NOTE - this document is fully interactive - using the Matrix provided on the following page you are able to click the links provided within the Workstream and Focus Area's columns. This will take you directly to the in-depth overview of each Focus Area.

To return back to the Matrix, please select the Guild 2025 Logo in the top left of each page.



PIPELINE INDUSTRIES GUILD

GUILD 2025 STRATEGY ROADMAP MATRIX

Governance	Ref	Workstreams	Focus Areas	High Level Deliverables	Delivery Model	Duration	Owner
Executive	A	Guild Structure & Management	<p>A1 To review the Guild leadership, determine requirements and recommend implementation of appropriate Guild structure</p> <p>A2 To review and update as required the Guild name, Guild mission statement & vision, current offering & relevance to members and governance (national, branch & panel)</p> <p>A3 To review and update as required company policies, processes and procedures</p> <p>A4 To review and update the overall Guild management including define the role of the officers and the Branch, Panel & Committee structure</p> <p>A5 To review and update the provision of headquarters services (internal & outsource) management structure & infrastructure to deliver them</p> <p>A6 To review and provide proposals for the commercial management and strategy of the Guild – focussed on income generation</p>	<p>Define and make recommendations for the Guild leadership requirements</p> <p>Review & make recommendations on updating Guild company and procedural documentation</p> <p>Review & make recommendations on the management structure for the Guild</p> <p>Review and make recommendations on the headquarters structure and management</p> <p>Establish annual governance and company process review process</p>	<p>Establish a working group and set a meeting schedule</p> <p>Appoint sub-groups with specialists as required to review the various aspects of the Guild structure and management</p> <p>Undertake further membership consultation, as required, through questionnaires, polls, workshops etc to finalise membership requirements.</p>	26 months	A1 - Chair A2 - Chair A3 - CEO / Governance Director A4 - Chair A5 - CEO
Communications Panel	B	Membership Engagement	<p>B1 Review and make recommendations to update as required the new membership onboarding process</p> <p>B2 Review and make recommendations to update as required the membership resignation process</p> <p>B3 Review and make recommendations to update existing or introduce new membership engagement activities</p> <p>B4 Review and make recommendations to update existing or introduce new regular feedback and initiative requests</p> <p>B5 Review and make recommendations to update as required data collection and reporting on membership engagement</p> <p>B6 Review and make recommendations on the resources required to maintain and improve membership engagement</p>	<p>Review and make recommendations for the update of existing standard documentation relating to membership engagement</p> <p>Review and make recommendations for the update of Guild Standard Operating Procedures for membership related activities, including membership induction/resignation</p> <p>Review and make recommendations for the update for dedicated time/resource for each membership engagement activity (eg key account leads)</p> <p>Review and make recommendations for formalising planning of face to face interaction with members</p> <p>Review and make recommendations for the formalising of membership feedback initiative</p> <p>Review and make recommendations for the establishment of KPI measures and planning a review process to keep acting on learnings</p>	<p>Establish a working group and set a meeting schedule</p> <p>Appoint sub-groups with specialists as required to review the various aspects of the Guild structure and management</p> <p>Undertake further membership consultation, as required, through questionnaires, polls, workshops etc to finalise membership requirements.</p>	25 months	
Communications Panel	C	Communication	<p>C1 Maintenance of the Guild Website Content – Development of a Member's area</p> <p>C2 Review and determine how technical information is shared through virtual mediums such as the website, video conferencing and webinars</p> <p>C3 Review the Guild social media presence and determine if the coverage is correct and the right platforms are being used</p> <p>C4 Review and provide proposals for website advertising</p> <p>C5 Review and provide proposals for the improvement of the Guild Newsletter – identify how distribution can be increased.</p> <p>C6 Review and provide proposals for the improvement of the Online Directory. Review and provide recommendations on whether the printed version should be reintroduced or otherwise</p> <p>C7 Review the requirement for a Guild App and determine if it is appropriate and cost effective.</p>	<p>Review and make recommendations for the development and content of the members area of the website.</p> <p>Review and make recommendations on the existing and new methods of disseminating technical information</p> <p>Review and make recommendations on the Guild's presence on virtual platforms.</p> <p>Review and make recommendations on website and other methods of advertising</p> <p>Review and make recommendations for updating of the Guild newsletter and methods to increase its circulation</p> <p>Review and make recommendations for updating and improving of the Guild's Online directory and determine if a printed version is required.</p>	<p>Establish a working group and set a meeting schedule</p> <p>Appoint sub-groups with specialists as required to review the various aspects of the Guild structure and management</p> <p>Undertake further membership consultation, as required, through questionnaires, polls, workshops etc to finalise membership requirements.</p>	36 months	
Board	D	Training & Education	<p>D1 Review and make recommendations on how the Guild can engage with schools – STEM – (Science, Technology, Engineering or Mathematics in schools.)</p> <p>D2 Review and make recommendations on the Guild's engagement with academic institutions.</p> <p>D3 Review and make recommendations on the role and aims of the Professional Development Network to ensure that the Guild continues to exist and strive forward in the future.</p> <p>D4 Review and make recommendations on how the Guild engage with big companies within the pipe industry that currently offer apprenticeships and determine how the Guild could become part of these apprenticeships.</p> <p>D5 Review and make recommendations on the Guild's strategy for issuing CPD certification to the membership.</p> <p>D6 Review and make recommendations on a Guild's strategy for mentoring to assist members in sharing knowledge to promote personal and professional development</p>	<p>Review and make recommendations on how the Guild engages with young people, either in schools or in further education, to promote technical and engineering topics, specifically as they relate to pipelines and buried infrastructure</p> <p>Review and make recommendations on how the Guild can define pipeline engineering as a discipline. How it links to academic institutions and influences an increase in the pipeline relevant content of courses. How it improves sustainability by supporting academic institutions through promotion and research topics</p> <p>Review and make recommendations on the current format of the PDN by undertaking a gap analysis of structure, role support, funding, mentoring, training, guidance documentation and templates to ensure that the PDN continues to operate as a vital and vibrant Panel.</p> <p>Make recommendations on how to create a common approach for engagement with the Guild membership on apprenticeship opportunities and measures for success on how this engagement will benefit the Guild and its membership.</p> <p>Review and make recommendations on the Guild's strategy for providing CPD certification to the membership.</p> <p>Review and make recommendations on the development of a Guild strategy on mentoring</p>	<p>Establish a working group and set a meeting schedule</p> <p>Appoint sub-groups with specialists as required to review the various aspects of the Guild structure and management</p> <p>Undertake further membership consultation, as required, through questionnaires, polls, workshops etc to finalise membership requirements.</p>	60 months	D3 - PDN Chair D6 - 1st Deputy Chair
Board	E	Events & Services	<p>E1 To undertake a full review of both Nationally & Regionally held events</p> <p>E2 Development of a 3-year programme for national events and continued maintenance of an effective and up-to-date calendar for members.</p> <p>E3 To review and update Guild Policy & Procedures and Terms of Reference in relation to the type, frequency and cost (including sponsorship) for all events and services.</p> <p>E4 To review and establish an industry-Leading platform for hosting virtual events and online webinars.</p> <p>E5 To review current provided services offered and consider the provision of new value-adding services for Guild Members.</p> <p>E6 To create tailored events and services that attract and retain a membership audience of greater diversity and backgrounds.</p>	<p>Undertake a full review of past events and make recommendations for future events, including the capture of members opinions in a survey / questionnaire.</p> <p>Undertake a review and update events procedures and guidance for National, Regional and Panel events. (to include organisation and finance)</p> <p>Create an industry leading platform for Online Events, Content and Webinars.</p> <p>Development of a 3-year programme for national events</p> <p>Provide recommendations on the establishment of an effective members only function on the Guild website to provide value-adding services and events for Guild Members.</p> <p>Provide recommendations to drive and increase diversity at all events and Guild related functions.</p> <p>Provide recommendations on the creation of a database / archive of past videos / topics of speakers and their presentations for future use and availability to members.</p>	<p>Establish a working group and set a meeting schedule</p> <p>Appoint sub-groups with specialists as required to review the various aspects of the Guild structure and management</p> <p>Undertake further membership consultation, as required, through questionnaires, polls, workshops etc to finalise membership requirements.</p>	32 months	
Communications Panel	F	Business Development	<p>F1.1 Provide recommendations for the development of a business development strategy/procedure for the Guild</p> <p>F1.2 Review and provide recommendations on how the Guild interacts with members</p> <p>F1.3 Review and provide recommendations on for the update of the Guild's marketing literature</p> <p>F2 Review and provide recommendations on how to make the Guild more visible</p> <p>F3 Review and provide recommendations on how to expand the scope of the coverage of the Guild from pipeline technology to other related areas</p> <p>F4 Review and provide recommendations on how the Guild interacts with professionals and Technicians</p> <p>F5 Review and provide recommendations on how to develop links with armed forces, prison service as a conduit for entry into the pipeline industry</p> <p>F6 Review and provide recommendations on the Guild's advertising of events</p> <p>F7 Provide recommendations on the development of a strategy for engagement with government and its agencies to create tailored events and services that attract and retain a membership audience of greater diversity and backgrounds.</p>	<p>Review and provide recommendations for updating the Guild's Business Development Strategy including event types, management and advertising of events</p> <p>Review and provide recommendations for engagement with both professionals and technicians</p> <p>Review and provide recommendations for a strategy to develop links with the armed forces, prison services etc</p> <p>Review and provide recommendations on engagement with government departments</p>	<p>Establish a working group and set a meeting schedule</p> <p>Appoint sub-groups with specialists as required to review the various aspects of the Guild structure and management</p> <p>Undertake further membership consultation, as required, through questionnaires, polls, workshops etc to finalise membership requirements.</p>	24 months	

PIPELINE INDUSTRIES GUILD

GUILD 2025

ROADMAP GROUPS

DATE: 20/02/2020

REVISION: 2

GROUP	Guild Structure & Management	Membership Engagement	Communications	Training & Education	Events & Services	Business Development
GROUP LEADER	Norman Howell	Jason Wilson	Phil Clisham	Daniel Jefferson	Adam Wynne Hughes	Robert Murray
1	Mike Stratton MS & Associates mike.stratton@msaglobalconnections.com	Andrew Ball J Murphy & Sons Ltd andrewball@murphygroup.co.uk	Matthew O'Reilly ATP mattewor@atpuk.co.uk ALSO INTERESTED IN OVERSEAS	Kyle Ingram Morrison Utility Services Kyle.Ingram@morrisonus.com	Andrew Ball J Murphy & Sons Ltd andrewball@murphygroup.co.uk	Chris Bielby cgbeilby@hotmail.co.uk
2	Jo Parker Watershed Associates j.parker101@btinternet.com	Kanthi Ford kfv consulting admin@kfvconsulting.com	Annie Ross Penspen A.Ross@penspen.com	Nick Preston NJJP nick@njjp.co.uk	Tony Kitchen Ant Hire tony@anthire.com	Sam West Dalcour Maclaren sam.west@dalcourmaclaren.com
3	Nick Anderson Wessex Water nick.anderson@wessexwater.co.uk	Kevin Blyth Serimax kevin.blyth@serimax.com	Kanthi Ford kfv consulting admin@kfvconsulting.com	Jason LaValley LaValley Industries jasonl@lavalleyindustries.com	Nick Preston NJJP nick@njjp.co.uk	John Ineson Currie & Brown John.Ineson@curriebrown.com
4	Andrew Wilson Pipe Induction Heat Ltd Andrew.Wilson@sbdinc.com	Jo Parker Watershed Associates j.parker101@btinternet.com	Dave Watson We thank Dave for his involvement and contribution.	Nigel Cuson Penspen n.cuson@penspen.com	Annie Ross Penspen A.Ross@penspen.com	Kyle Ingram Morrison Utility Services Kyle.Ingram@morrisonus.com
5	James Harrison Cadent james.r.harrison@cadentgas.com	Matt Goode Cadent Matthew.goode@cadentgas.com	Jake Parker J N Bentley jake.parker@jnbentley.co.uk	Eliot Bailey CALM Solutions Ltd EliotB@calm-solutions.com	Gosia Szypulska Atkins Gosia.Szypulska@atkinsglobal.com	Darren Bartlett Penspen D.Bartlett@penspen.com
6		Kate Lazenby Costain Kate.lazenby@costain.com		Sandra Rofe Dickenson Pipetechnics 'sandra@pipetechnics.com'		
HQ STAFF MEMBER	Kathryn Furphy hqsec@pipeguild.com	Rebecca McAdam membership@pipeguild.com	Rebecca McAdam membership@pipeguild.com	Kathryn Furphy hqsec@pipeguild.com	Kate Byfield events@pipeguild.com	Kate Byfield events@pipeguild.com
EXISTING GUILD COMMITTEES	Executive, Audit Group		Communications Panel			



GUILD 2025 STRATEGY ROADMAP

Workstream	A. Guild Structure & Management
Duration	36 months
Lead	Norman Howell

High Impact		
Low Impact		
	Easy to implement	Hard to implement



Scope of this project & workstream

The Guild 2025 Strategy Roadmap consists of six workstreams: Guild Structure & Management, Membership Engagement, Communications, Training & Education, Events & Services and Business Development which will be brought together to provide a 5 year strategy for the Guild.

The long-term aim of the Guild Structure & Management workstream is to undertake a review of the Guild objectives, future vision, structure, governance, company corporate policies, the role of the officers, the Guild leadership, management, provision of services and headquarters function to establish a sustainable framework for the Guild into the future.

This workstream will also develop a procedure for the regular review of the management framework to ensure it remains fit for purpose .

Workstream outcome(s) as required

- A1 To review the Guild leadership, determine requirements and recommend implementation of appropriate Guild structure
- A2 To review and update as required the Guild name, Guild mission statement & vision, current offering & relevance to members and governance (national, branch & panel)
- A3 To review and update as required company policies, processes and procedures
- A4 To review and update the overall Guild management including define the role of the officers and the Branch, Panel & Committee structure
- A5 To review and update the provision of headquarters services (internal & outsource) management structure & infrastructure to deliver them
- A6 To review and provide proposals for the commercial management and strategy of the Guild – focussed on income generation

Benefits

- Have a suite of documents that outline the Guild's purpose ,policies & procedures and governance
- Have a Guild structure that has clearly defined leadership & officer roles.
- Establish a headquarters infrastructure and structure to deliver the services required for the Guild & its events.

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Measure

- Have a suite of management documents that are accessible and easy to understand.
- Have an effective Guild management and leadership structure in place.
- Have an efficient and agile headquarters structure to manage and promote the Guild
- Have a review process aimed at year on year improvement in the overall management of the Guild

Strategic Objective(s)

Update the current Guild structure and management to provide a framework to deliver the Guild's objectives for the next 5 years ..

Capacity Plan

1 x workstream lead – .Norman Howell
3 to 4 persons (tbc) members including representation from the Board, PDN and PCF.
Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable

- Issue to the group the existing standard documentation for review
- Establish a meeting schedule with the aim of delivering the following:
- Define leadership requirements
- Updated Guild company documentation
- Management structure for the Guild
- Establish headquarters structure and management
- Establish annual review process

Duration

- 1 month
- 4 months
- 9 months
- 9 months
- 12 months
- 12 months

Dependencies

Guild 2025 Working Groups
Guild Executive Subcommittee
Guild Finance Committee
Guild Governance Director.
Guild HQ Staff

Critical Success Factors

Establishment of revised Guild vision, company documentation, management structure and headquarters infrastructure and management

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the roadmap
Unable to agree common approach to the development of the roadmap
Lack of engagement with other workstream groups and Guild committees

Date and Revision

20 October 2020 Revision 6



GUILD 2025 STRATEGY ROADMAP

Workstream	Guild Structure & Management – A1
Duration	6 months
Lead	Norman Howell

High Impact	
Low Impact	
Easy to implement	Hard to implement

Scope of this project & workstream

A1 Guild Leadership

- a. Review the Guild leadership, determine requirements and recommend implementation of appropriate Guild structure
- b. Define the role of the CEO –
 - i. Should the role be focussed on technical, finance or business development
 - ii. Should the role be full or part time
 - iii. Should the role be taken by someone who has a technical background giving greater understanding of the industry

Workstream outcome(s) as required

- A1 To review and make recommendations on the following::
- a. Guild Leadership
 - b. Definition of the role and the type of leadership required

Strategic Objective(s)

Review the existing Guild leadership requirements and make recommendations for this key position for the next 5 years ..

High Level Deliverable

Duration

- | | |
|---|----------|
| <ul style="list-style-type: none"> • Current CEO to prepare a job specification | 1 month |
| <ul style="list-style-type: none"> • Executive Committee to establish a Working group to review the job specification and amend as required | 1 month |
| <ul style="list-style-type: none"> • Establish a meeting schedule with the aim of reviewing and developing recommendations for the Guild's Leadership role ensuring recommendations contain flexibility as the role will change from re-organisation work to a more established settled position. Legal/HR input will be required to allow any change in personnel to be easily managed as the role evolves. | 3 months |
| <ul style="list-style-type: none"> • Prepare a report containing recommendations for the Guild Leadership role for approval by the Guild Executive and Board | 1 month |

Dependencies

Guild 2025 Working Groups
 Guild Executive Subcommittee, Finance Committee, Governance Director. HQ Staff

Critical Success Factors

Establish recommendations for the Guild Leadership role

Benefits

- Have decisive Guild Leadership
- Have a recognised face for the Guild
- Provide the Guild with effective management

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Measure

- The Guild has decisive and effective leadership
- The Guild has competent and cost effective management

Capacity Plan

1 x workstream lead – .Norman Howell
 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF.
 Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the roadmap
 Unable to agree common approach to the development of the roadmap
 Lack of engagement with other workstream groups and Guild committees

Date and Revision

20 October 2020 Revision 6



GUILD 2025 STRATEGY ROADMAP

Workstream	Guild Structure & Management – A2
Duration	9 months
Lead	Norman Howell

High Impact		
Low Impact		
	Easy to implement	Hard to implement



Scope of this project & workstream	<p>.A2 Guild Foundation & Objectives Review the following aspects of the Guild and determine if they reflect the current objectives:</p> <ol style="list-style-type: none"> The Guild name – is this old fashioned and gives the wrong impression of the Guild Mission Statement and Vision What does the Guild offer to members What is the relevance of the Guild to its members What is the make up of the Guild membership – who are our customers What is the Guild focus – it appears at present to be attracting interaction from smaller companies Guild Governance - National, Branch, Panel
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Workstream outcome(s) as required	<p>A2 To review and update as required the following:</p> <ol style="list-style-type: none"> The Guild name Guild Mission Statement & Vision, Current Make Up, Offering & Relevance to Members Member Benefits Overall strategy and develop implementation.
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Strategic Objective(s)	Review and update the current Guild objectives, and member benefits for the next 5 years ..
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High Level Deliverable	Duration
<ul style="list-style-type: none"> Develop and run a Workshop for Guild members to gain their opinions and requirements in relation to Guild name, mission statement, vision, benefits etc 	4 months
<ul style="list-style-type: none"> Establish a Working Group to develop pre workshop consultation and the format and agenda for the workshop 	1 month
<ul style="list-style-type: none"> The Working Group to collect the workshop outputs and prepare a report providing recommendations and a timescale for implementation for consideration and approval by the Guild Executive and Board 	2 months
<ul style="list-style-type: none"> The Working Group to undertake a review of the overall strategy and the implementation plan and provide recommendations for consideration by the Executive and the Board 	2 Months

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee, Finance Committee, Governance Director. HQ Staff	Establishment of revised Guild vision, member benefits, company documentation, governance and management structure

Benefits	H M L	Measure
<ul style="list-style-type: none"> Have a clear understanding and suite of documents that outline the Guild's purpose, membership benefits and governance 	H	<ul style="list-style-type: none"> Have a suite of documents that are accessible and easy to understand that outline the following: <ul style="list-style-type: none"> The Guild's objectives Membership Benefits Overall Governance. Have a review process aimed at year on year improvement in the overall management of the Guild
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Capacity Plan	Capability Plan
1 x workstream lead – .Norman Howell 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues
Lack of activity from the workstream team leading to delay in finalising the roadmap Unable to agree common approach to the development of the roadmap Lack of engagement with other workstream groups and Guild committees

Date and Revision
20 October 2020 Revision 6



GUILD 2025 STRATEGY ROADMAP

Workstream	Guild Structure & Management – A3
Duration	24 months
Lead	Norman Howell

High Impact	Low Impact	Easy to implement	Hard to implement

Scope of this project & workstream	<p>.A3 Guild Policies, Processes and Procedures Undertake a review and provide recommendations for updates and changes on the following items:</p> <ol style="list-style-type: none"> Company Policies, Processes and Procedures Guild Corporate Polices – Health and Safety, People, GDPR Corporate Social Responsibility, Equality, Bribery and Corruption etc Guild Governance - National, Branch, Panel Guild legal support
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Workstream outcome(s) as required	<p>A3 To review and update as required the following:</p> <ol style="list-style-type: none"> Guild Company Polices, Processes and Procedures (Articles of Association, SOPS, TORS etc) Guild Corporate Polices Governance (National, Branch & Panel) Guild Legal Support
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Strategic Objective(s)	Review and update the current Guild polices, processes, procedures, company policies, governance and legal support for the next 5 years ..
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High Level Deliverable	Duration
<ul style="list-style-type: none"> Establish a Specialist Working Group comprising of persons with experience in company governance and risk analysis. The group will also require input from legal support. 	1 month
<ul style="list-style-type: none"> Issue to the group the existing standard documentation for review 	1 month
<ul style="list-style-type: none"> Working Group will develop a strength and weakness analysis template that will be forwarded to all Guild, Branch, Panel and Specialist Committees 	2 months
<ul style="list-style-type: none"> Establish a meeting schedule to utilise feedback on the strengths and weaknesses of participation within the Guild to develop recommendations on an updated structure for the Guild and the roles of its officers 	3 month
<ul style="list-style-type: none"> Review and recommend amendments to Guild company documentation, governance and management structure 	6 months
<ul style="list-style-type: none"> The Working Group will prepare a report on the actions required and timescale for implementation for approval by the Executive and the Board 	9 months
<ul style="list-style-type: none"> Complete update of all approved changes to Guild documentation 	2 months

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee, Finance Committee, Governance Director. HQ Staff	Establishment of revised Guild Company Policies, Processes and Procedures, Corporate Policies and Legal Support

Benefits	H M L	Measure
<ul style="list-style-type: none"> Have a revised suite of documents that outline Guild Company Policies, Processes and Procedures, Corporate Policies. Establish competent and reliable legal and HR support 	H	<ul style="list-style-type: none"> Have a suite of documents that are accessible and easy to understand that outline the following: <ul style="list-style-type: none"> Guild Company Policies, Processes and Procedures, Corporate Policies and Legal Support Have competent and reliable legal and HR support in place
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Capacity Plan	Capability Plan
1 x workstream lead – .Norman Howell 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues
Lack of activity from the workstream team leading to delay in finalising the roadmap Unable to agree common approach to the development of the roadmap Lack of engagement with other workstream groups and Guild committees

Date and Revision
20 October 2020 Revision 6



GUILD 2025 STRATEGY ROADMAP

Workstream	Guild Structure & Management – A4
Duration	
Lead	Norman Howell

High Impact		
Low Impact		Hard to implement

Scope of this project & workstream

A4 Guild Management Structure

- a. Review Guild Structure – Board, Executive, Branches, Panels and specialist committees (Finance, Audit, Communications, PCF, PDN)
- b. Review the roles of the Officers -- President, Chair, 1st and 2nd Deputies, Audit Chair, Finance Director
- c. Consider the introduction of Patrons to provide friendly support
- d. Review if there is a requirement for both the Audit and Finance Committees

Workstream outcome(s) as required

- .A4 To review and update as required the following:
- a. Guild Structure
 - b. The roles of the Guild Officers
 - c. The requirement for a Guild Audit and Finance Committee

Dependencies

Guild 2025 Working Groups
Guild Executive Subcommittee, Finance Committee, Governance Director. HQ Staff

Critical Success Factors

Establishment of revised Guild Structure and defined officer roles

Strategic Objective(s)

Review and update the current Guild structure, roles of the officers, role of the audit and finance committees for the next 5 years ..

Benefits

- Have a revised and documented Guild Structure
- Have revised and documented roles for Guild officers

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Measure

- Have a document that outlines the Guild structure
- Have a document that outlines the revised role of Guild officers
- Update the Guild articles of Association

High Level Deliverable

Duration

<ul style="list-style-type: none"> • Establish a Specialist Working Group comprising of persons with knowledge of the Guild and experience in company law, policies, procedures and processes. The group will also require input from legal support 	1 month
<ul style="list-style-type: none"> • Issue to the group the existing standard documentation for review 	1 month
<ul style="list-style-type: none"> • Establish a meeting schedule with the aim of developing, updated Guild company documentation, governance and management structure 	6 months
<ul style="list-style-type: none"> • Working Group to review the structure and roles of the officers of the Guild 	6 months
<ul style="list-style-type: none"> • Prepare a report on recommendations and a timescale for implementation for consideration and approval by the Guild Executive and Board 	1 month

Capacity Plan

1 x workstream lead – .Norman Howell
3 to 4 persons (tbc) members including representation from the Board, PDN and PCF.
Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the roadmap
Unable to agree common approach to the development of the roadmap
Lack of engagement with other workstream groups and Guild committees

Date and Revision

20 October 2020 Revision 6



GUILD 2025 STRATEGY ROADMAP

Workstream	Guild Structure & Management – A5
Duration	6 months
Lead	Norman Howell

High Impact		
Low Impact		Easy to implement

Scope of this project & workstream

A5 HQ Structure

- a. Rent or own building
- b. Retain or outsource secretariat
- c. Retain existing staff and consider further additions to increase skill base
- d. Review services and determine if it is more economic to outsource
- e. Review other services that could be offered

Workstream outcome(s) as required

- A5 To review and make recommendations on the following::
- a. Guild HQ – own or rent offices
 - b. Retain existing or outsource the secretariat services
 - c. Retain existing staff and consider further additions to increase skill base
 - d. Services provided by HQ, what other services could be offered and determine if outsourcing gives better value

Strategic Objective(s)

Review the existing HQ premises, services offered and any others that could be offered, roles of the staff and consider outsourcing option to ensure the support services are adequate for the next 5 years ..

High Level Deliverable

- Establish a working group to review all aspects of the Guild HQ structure
- Establish a meeting schedule with the aim of reviewing and developing recommendations for the Guild's office structure and service delivery
- Prepare a report on recommendations and a timescale for implementation for consideration and approval by the Guild Executive and Board

Duration

1 month
4 months
1 month

Dependencies

Guild 2025 Working Groups
Guild Executive Subcommittee, Finance Committee, Governance Director. HQ Staff

Critical Success Factors

Provide recommendations for the Guild HQ office, staff roles and services delivered

Benefits

- Have an HQ office with the facilities to deliver the required services
- Have motivated and capable staff
- Deliver services required by the membership
- Deliver services at a cost effective price

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- Have a functioning HQ
- Have motivated and capable staff
- Deliver the services members require
- Deliver services as cost effectively as possible

Capacity Plan

1 x workstream lead – .Norman Howell
3 to 4 persons (tbc) members including representation from the Board, PDN and PCF.
Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the roadmap
Unable to agree common approach to the development of the roadmap
Lack of engagement with other workstream groups and Guild committees

Date and Revision

20 October 2020 Revision 6



GUILD 2025 STRATEGY ROADMAP

Workstream	Guild Structure & Management – A6
Duration	14 months
Lead	Norman Howell

High Impact	
Low Impact	
Easy to implement	Hard to implement

Scope of this project & workstream	<p>A6 Commercial Management & Strategy</p> <ol style="list-style-type: none"> a. Review existing Guild income streams and provide proposals for alternative ways to generate income for the Guild b. The review should investigate the following: <ol style="list-style-type: none"> i. Ways to retain and expand the membership - A stringy needs to be developed to encourage larger corporate companies to become members ii. Establish how the Guild's virtual platforms can be used to develop income streams iii. Review other ways to generate income as alternatives to the Guild's tradition events such as dinners, social gathers and technical seminars and conferences iv. Consider what benefits any new initiates for income generation provide to the Guild membership
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Workstream outcome(s) as required	<p>A6 To review and make recommendations on the following::</p> <ol style="list-style-type: none"> a. Existing Guild income streams b. Retention and expansion of the Guild membership c. The use of the Guild's virtual platforms to provide new sources of income d. Determine if there are any new initiatives that can be introduced as alternatives to existing events to generate income
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Strategic Objective(s)	Review the existing Income streams, provide recommendations for amendments and new initiatives and develop a strategy for income generation for the next 5 years ..
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High Level Deliverable	Duration
<ul style="list-style-type: none"> • Establish a working group to review all aspects of the Guild's commercial management 	1 month
<ul style="list-style-type: none"> • Establish a meeting schedule with the aim of reviewing and developing recommendations for the Guild's commercial management and strategy 	4 months
<ul style="list-style-type: none"> • Prepare a report on recommendations and a timescale for implementation for consideration and approval by the Guild Executive and Board 	9 month

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee, Finance Committee, Governance Director. HQ Staff	Provide recommendations for the Guild's commercial management and strategy

Benefits	H M L	Measure
<ul style="list-style-type: none"> • Have a clear commercial strategy for income generation to fund the Guild's operations and events 	H	<ul style="list-style-type: none"> • Have sufficient income to fund the Guild operations and events
<ul style="list-style-type: none"> • Continue to ensure the Guild has sufficient income to provide the events and benefits required by the membership 	H	
	H	

Capacity Plan	Capability Plan
1 x workstream lead – .Norman Howell 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues
<p>Lack of activity from the workstream team leading to delay in finalising the roadmap Unable to agree common approach to the development of the roadmap Lack of engagement with other workstream groups and Guild committees</p>

Date and Revision
20 October 2020 Revision 6



GUILD 2025 STRATEGY ROADMAP

Workstream	B. Membership Engagement
Duration	37 months
Lead	Jason Wilson

High Impact	
Low Impact	
Easy to implement	Hard to implement

Scope of this project & workstream	<p>The Guild 2025 Strategy Roadmap consists of six workstreams: Guild Structure & Management, Membership Engagement, Communications, Training & Education, Events & Services and Business Development which will be brought together to provide a 5 year strategy for the Guild.</p> <p>The aim of the Guild Membership Engagement workstream is to undertake a review of the current Guild membership activities and the support provided by the Guild leadership, management and HQ function to ensure the best membership experience for both new and existing members. Update the Guild processes for new membership onboarding, membership resignation, membership engagement activities, feedback and initiative requests and data collection and reporting on membership engagement. . It is intended that any revisions or amendments to these activities are introduced and implemented as quickly as possible to ensure that the benefits are promptly realised. To assess the resources required to maintain and improve membership engagement.</p>
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Workstream outcome(s) as required	<p>B1 Review and make recommendations to update as required the new membership onboarding process</p> <p>B2 Review and make recommendations to update as required the membership resignation process</p> <p>B3 Review and make recommendations to update existing or introduce new membership engagement activities</p> <p>B4 Review and make recommendations to update existing or introduce new regular feedback and initiative requests</p> <p>B5 Review and make recommendations to update as required data collection and reporting on membership engagement</p> <p>B6 Review and make recommendations on the resources required to maintain and improve membership engagement</p>
Strategic Objective(s)	Review and update processes to ensure new members are welcomed, to understand why members resign and develop systems to manage member engagement to gain effective feedback. Provide recommendations on resources required to deliver effective member engagement.

Benefits	H M L	Measure
<ul style="list-style-type: none"> Greater interaction with the membership resulting in better events and member retention Have a Guild structure that links up with other affected workstreams such as comms panel etc Provide more effective communication with the members. Have a readily available suite of documents that outline the Guild's benefits of membership Balances proactive management to the retention of existing members and onboarding of new 	H H H H	<ul style="list-style-type: none"> Greater attendance at In-Person Events – nationally and regionally Greater Attendance to Online Webinars and Conference Calls Greater member interaction through the website and social media. Feedback and data collection process providing information on membership engagement .

High Level Deliverable	Duration
<ul style="list-style-type: none"> Issue to the group the existing standard documentation for review Establish a meeting schedule with the aim of delivering the following: Undertake a review of the membership onboarding process and make recommendations on improvements for approval by the Executive and Board Update Guild company documentation SOP for membership related activities, inc membership induction/resignation Dedicated time/resource to activity (eg key account leads) Formalised planning of Face to Face interaction with members Formalised membership feedback initiative Establish KPI measures and plan do review process to keep acting on learnings 	1 month 1 month 6 months 6 months 4 months 6 months 6 months 3 months 4 months

Capacity Plan	Capability Plan
1 x Workstream Lead 3-4 persons(tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Regional Branches.	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee. Guild HQ Staff Guild Branches & Technical Panels	To have effective and efficient events and benefits that meet the members needs Have processes to gain membership feedback Increase membership through better engagement

Risks / Issues
Risk of Reducing membership due to lack of effective engagement Risk to the Guild income through reduced membership Risk to the Guild reputation through lack of membership engagement

Date and Revision
11 September 2020 Revision 1



GUILD 2025 STRATEGY ROADMAP

Workstream	B. Membership Engagement: B1
Duration	31 months
Lead	Jason Wilson

High Impact	
Low Impact	
Easy to implement	Hard to implement

Scope of this project & workstream	<p>BI: Membership Onboarding Process Review and make recommendations to update as required the new membership onboarding process</p> <p>Items for consideration</p> <ul style="list-style-type: none"> • Membership Benefits • Event Suggestions • Member's own internal comms network • Track Member's social media • Surveys • Industry focus networking sessions • Local branch/panel welcome
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Workstream outcome(s) as required	<ul style="list-style-type: none"> • Develop an onboarding procedure for new members • Review and update member benefits look at innovative approaches to attract new members • Develop a process to gain feedback from members and provoke interaction to drive suggests for new events • Determine ways to improve communications within members companies to drive greater awareness and interactive • Leveraging members' social media to improve Guild awareness and gain ideas for future events and benefits • Develop a survey programme to gain members'views on key industry topics • Consider developing a programme of meetings with key industry organisations> Network owners, tier 1 suppliers, regulators, government etc.
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Benefits	H M L	Measure
• Greater interaction with new members making them feel welcome, getting them involved and less likely to leave.t	H	<ul style="list-style-type: none"> • Greater Attendance at In-Person and virtual Events – nationally and regionally • Improved interaction with new members
• Provide greater range of benefits and events to members	H	
• Provide more effective communication with the members.	H	

Strategic Objective(s)	Review and update processes to ensure new members are welcomed
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Capacity Plan	Capability Plan
1 x Workstream Lead 3-4 persons(tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Regional Branches.	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable	Duration
<ul style="list-style-type: none"> • Undertake a review of the membership onboarding process and make recommendations on improvements for approval by the Guild Executive and Board • Issue to the group the existing standard documentation for review • Establish a meeting schedule • Develop recommendations for welcoming new members • Review existing member benefits and suggest improvements 	12 months 1 month 2 months 4 months 12 months

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee. Guild HQ Staff Guild Branches & Technical Panels	To have effective and efficient services that meet the members needs Well attended face to face and virtual events A fully functional Guild calendar

Risks / Issues
Risk of Reducing membership due to lack of effective engagement Risk to the Guild income through reduced membership Risk to the Guild reputation through lack of membership engagement

Date and Revision
11 September 2020 Revision 1



GUILD 2025 STRATEGY ROADMAP

Workstream	B. Membership Engagement: B2
Duration	15 months
Lead	Jason Wilson

High Impact		
Low Impact		
	Easy to implement	Hard to implement

Scope of this project & workstream

B2 Membership Resignation Process:
 Review and make recommendations to update as required the membership resignation process

Items to consider

- Exit Interview/Close out feedback
- Establish a final retention process
- Review of contact data
- Maintain future contact sharing benefits
- Welcome back offers

Workstream outcome(s) as required

- Review and update the Guild membership resignation process. This should include:
 - A quick and simple exit interview
 - A final retention process
- Ensure that the correct contact is in place
- Develop a periodic resigned member contact protocol to maintain contact
- Consider a welcome back offer scheme and feedback reward scheme

Strategic Objective(s)

Review and update processes to provide a robust process for handling membership resignations and membership retention

High Level Deliverable

- Undertake a review of the membership resignation process and make recommendations on improvements for approval by the Guild Executive and Board
- Issue to the group the existing standard documentation for review
- Establish a meeting schedule
- Develop recommendations to handle member resignations and a process to follow to attempt to retain member

Duration

6 months
 1 month
 2 months
 6 months

Benefits

- Developed process to follow to attempt to retain resigning members
- Less member resignations so member numbers and subscription income is maintained

H M L

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Measure

- Reduced number of resignations
- Maintain membership numbers
- Maintain existing subscription income

Capacity Plan

1 x Workstream Lead
 3-4 persons(tbc) members including representation from the Board, PDN and PCF.
 Support from Guild HQ Events Team
 Active involvement from Regional Branches.

Capability Plan

Ensure all involved want to be involved and have an interest in the end result.
 Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies

Guild 2025 Working Groups
 Guild Executive Subcommittee
 Guild Finance Committee.
 Guild HQ Staff
 Guild Branches & Technical Panels

Critical Success Factors

To have effective and efficient services that meet the members needs
 Well attended face to face and virtual events
 A fully functional Guild calendar

Risks / Issues

- Risk of Reducing membership due to lack of effective engagement
- Risk to the Guild income through reduced membership
- Risk to the Guild reputation through lack of membership engagement

Date and Revision

11 September 2020 Revision 1



GUILD 2025 STRATEGY ROADMAP

Workstream	B. Membership Engagement: B3
Duration	28 months
Lead	Jason Wilson

High Impact		
Low Impact		
	Easy to implement	Hard to implement



Scope of this project & workstream	<p>B3 Membership Engagement Activities Review and make recommendations to update existing or introduce new membership engagement activities</p> <p>Items to consider</p> <ul style="list-style-type: none"> • Feedback contact surveys • Target contact identified non engaging members • Peer based discussion groups • Opportunity/collaboration database • Telephone Contacting
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Workstream outcome(s) as required	<ul style="list-style-type: none"> • Review existing membership engagement activities and develop recommendations for new activities: • Develop process for contact surveys particularly for non attendance at face to face and virtual events • Develop a procedure for target contacting focusing on members who do not engage or attend events • Review the introduction of peer discussion groups for members with specific job functions to establish what events members require • Establish an opportunity/project collaboration database for members, could use the job and expertise tags on the membership session to identify potential people and companies to go too for specific project needs or to look for potential opportunities to collaborate on a project as a partnership
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Benefits	H M L	Measure
<ul style="list-style-type: none"> • Processes and procedures that provide activities which engage the membership • Provide activities that provide member benefits • Processes and Procedures that assist in determining reasons for lack of membership engagement 	H	<ul style="list-style-type: none"> • Reduced number of resignations • Maintain membership numbers • Maintain existing subscription income • Improved membership benefits
	H	
	H	

Strategic Objective(s)	Review and update processes and procedures to provide membership engagement activities
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High Level Deliverable	Duration
<ul style="list-style-type: none"> • Undertake reviews and make recommendations on the following items for approval by the Guild Executive and Board • Membership engagement activities 	4 months
<ul style="list-style-type: none"> • Procedure for the Introduction of compulsory quick, tick box based surveys to event process and booking system . 	4 months
<ul style="list-style-type: none"> • Procedure to be Introduced for Exit / Follow up tick box surveys for after events and for those that booked and missed the event. (Calls to non attendees?) 	4 months
<ul style="list-style-type: none"> • contact surveys - Calls to members that have not engaged events regularly to discover why and if they would like to see something in particular 	4 months
<ul style="list-style-type: none"> • Procedure for target contacting 	4 months
<ul style="list-style-type: none"> • Procedure for peer discussion groups - for open discussion and ideas/advice i.e. BD, Sales, Marketing, HR etc. (Hosted?) 	4 months
<ul style="list-style-type: none"> • Establish an opportunity/project collaboration database for members 	4 months

Capacity Plan	Capability Plan
1 x Workstream Lead 3-4 persons(tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Regional Branches.	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee. Guild HQ Staff Guild Branches & Technical Panels	To have effective and efficient services that meet the members needs Well attended face to face and virtual events A fully functional Guild calendar

Risks / Issues

Risk of Reducing membership due to lack of effective engagement
 Risk to the Guild income through reduced membership
 Risk to the Guild reputation through lack of membership engagement

Date and Revision

11 September 2020 Revision 1



GUILD 2025 STRATEGY ROADMAP

Workstream	B. Membership Engagement: B4
Duration	24 months
Lead	Jason Wilson

High Impact		★
Low Impact		
	Easy to implement	Hard to implement

Scope of this project & workstream

B4 Membership Feedback and Initiative Requests
 Review and make recommendations to update existing or introduce new regular feedback and initiative requests

Items to consider

- Survey Monkeys
- QR codes
- Promotional merchandise
- Formal contact by letter
- 1 to 1 meetings
- Member Forum area
- Exit survey
- Website suggestion box
- Adhoc telephone calls to members

Workstream outcome(s) as required

- Survey Monkey - Input from the committees and board regards topics for questions – 1 month to compile.
- QR codes – 1 week to produce by HQ or a volunteer
- Merchandise – some effort and investment required. 1 month
- Lettering – 1 month to compile a letter and get sign off from the exec.
- 1-2-1 meetings – large investment of time, 1-2 days a week for 1 x member of HQ and 1 x member of the exec or chair of branch
- Member Forum – Requirement for web developer to include this and HQ to monitor
- Text/Zoom feedback - relatively easy to set up. 2 hours per event
- Suggestion box – same as the forums, web developer
- Adhoc calls – 1 days work per month for HQ to compile a list then 4 hours a month for the exec and branch chairs to ring around and speak to members.

Strategic Objective(s)

Review and update processes and procedures to gain membership feedback and initiative requests

High Level Deliverable

- Undertake a review and make recommendations to update existing or introduce new regular feedback and initiative requests improvements for approval by the Guild Executive and Board
- Issue to the group the existing standard documentation for review
- Establish a meeting schedule
- Develop recommendations for survey monkeys, QR codes, merchandise, mail shots, 1 to 1 meetings, member forums, text/Zoom feedback, suggestion boxes and adhoc telephone calls

Duration

9 months
 1 month
 2 months
 12 months

Risks / Issues

- Risk of Reducing membership due to lack of effective engagement
- Risk to the Guild income through reduced membership
- Risk to the Guild reputation through lack of membership engagement

Benefits	H M L	Measure
<ul style="list-style-type: none"> • Processes for gaining feedback and new initiative ideas from the membership • Provide opportunities to have greater interaction with the membership 	H	<ul style="list-style-type: none"> • Reduced number of resignations • Maintain membership numbers • Maintain existing subscription income
	H	<ul style="list-style-type: none"> • Improved membership benefits • Provision of vehicles for greater membership interaction

Capacity Plan	Capability Plan
1 x Workstream Lead 3-4 persons(tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Regional Branches.	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee. Guild HQ Staff Guild Branches & Technical Panels	To have effective and efficient services that meet the members needs Well attended face to face and virtual events A fully functional Guild calendar

Date and Revision
11 September 2020 Revision 1



GUILD 2025 STRATEGY ROADMAP

Workstream	B. Membership Engagement: B5
Duration	23 months
Lead	Jason Wilson

High Impact	★	
Low Impact		
	Easy to implement	Hard to implement

Scope of this project & workstream

B5 Data Collection, Process and Performance Monitoring
 Review and establish as required for data collection and reporting of the engagement initiatives (KL)
 Items to consider

- Consider what existing data is already being captured and reported on
- Review current activities and identify opportunities to harvest data already available
- Assess effort v value of other opportunities to capture engagement data

Workstream outcome(s) as required

- Review what data exists, determine how it is collated and reported on in relation to membership engagement
- Develop a process for the capture of engagement data, its analysis and how it is used to monitor on going performance.
- Develop a suite of engagement Key Performance Indicators (KPI's) are agreed and reviewed on a quarterly basis. Resignation statistics must be included in this review
- Data can be categorised as follows
 - Transactional data -Examples such as membership renewals, event attendance.
 - Membership marketing response - Measured by counting Emails opened, links clicked (but not used), time on website, (google analytics) call to action responses
 - Social media interaction - Examples such as likes, shares and comments (members and potential members)
 - Touchpoint engagement - Conversations with HQ, other members, especially those initiated by the member

Strategic Objective(s)

To increase membership levels but ensuring that great membership satisfaction is maintained for both new and existing members for the next 5 years and beyond.

High Level Deliverable

- Undertake a review and make recommendations for the collection, analysis and use of data relating to membership engagement for approval by the Guild Executive and Board
- Issue to the group the existing standard documentation for review
- Establish a meeting schedule
- Develop recommendations for data collection, data analysis and use. Develop a membership engagement tracker with trend analysis.
- Develop a process to provide an indication of where certain members may not be engaging as healthy as others

Duration

12 months
 1 month
 2 months
 4 months
 4 months

Risks / Issues

- Risk of Reducing membership due to lack of effective engagement
- Risk to the Guild income through reduced membership
- Risk to the Guild reputation through lack of membership engagement

Benefits	H M L	Measure
• Processes for gaining the collection, analysis and use of data relating to membership engagement	H	• Reduced number of resignations
• Provide means of tracking membership engagement	H	• Maintain membership numbers
• Identify members who are not interacting and failing to get benefit from there membership	H	• Maintain existing subscription income
		• Improved membership benefits
		• Provision of processes to determine how members are interacting with the Guild

Capacity Plan	Capability Plan
1 x Workstream Lead 3-4 persons(tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Regional Branches.	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee. Guild HQ Staff Guild Branches & Technical Panels	To have effective and efficient services that meet the members needs Well attended face to face and virtual events A fully functional Guild calendar

Date and Revision
11 September 2020 Revision 1



GUILD 2025 STRATEGY ROADMAP

Workstream	B. Membership Engagement: B6
Duration	18 months
Lead	Jason Wilson

High Impact		★
Low Impact		
	Easy to implement	Hard to implement

Scope of this project & workstream	<p>B6 Dedicated Resources Review and establish as required the resource requirements to fulfil the needs of the engagement initiatives (JLW)</p> <p>Items to consider</p> <ul style="list-style-type: none"> • New initiative requirements • Current staff undertakings • Current staff capacity • Branch and panel support • Technology requirements
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Workstream outcome(s) as required	<ul style="list-style-type: none"> • Review how member engagement is currently undertaken and determine how Branches and Panels are supported by the HQ team. Membership contact to be considered as part of the Branch and Panel targets • Undertake a workload review of the HQ team and identify any existing membership engagement activity currently carried out, establishing unnecessary task and prioritising designated time • Review how greater priority can be given to membership engagement activities in a more focussed and structured way with dedicated HQ resource time assigned each week. • Review IT resources, potential adaptations additions of existing resources and new equipment to ensure that contemporary records of member contact data and regular process reviews and updates are maintained,.
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Strategic Objective(s)	To determine and ensure that adequate resources are available to support existing and new membership engagement activities
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High Level Deliverable	Duration
<ul style="list-style-type: none"> • Undertake a review and make recommendations for resources to support membership engagement for approval by the Guild Executive and Board • Issue to the group the existing standard documentation for review • Establish a meeting schedule • Develop recommendations for membership interaction with HQ staff, Branches & Panels • Develop recommendations for IT support for existing and new membership engagement 	<p>6 months</p> <p>1 month</p> <p>2 months</p> <p>4 months</p> <p>4 months</p>

Benefits	H M L	Measure
<ul style="list-style-type: none"> • Ensure that the correct resources are in place to support ongoing membership engagement 	H	<ul style="list-style-type: none"> • Reduced number of resignations • Maintain membership numbers • Maintain existing subscription income • Improved membership benefits • Provision of processes to determine how members are interacting with the Guild

Capacity Plan	Capability Plan
<p>1 x Workstream Lead</p> <p>3-4 persons(tbc) members including representation from the Board, PDN and PCF.</p> <p>Support from Guild HQ Events Team</p> <p>Active involvement from Regional Branches.</p>	<p>Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.</p>

Dependencies	Critical Success Factors
<p>Guild 2025 Working Groups</p> <p>Guild Executive Subcommittee</p> <p>Guild Finance Committee.</p> <p>Guild HQ Staff</p> <p>Guild Branches & Technical Panels</p>	<p>To have effective and efficient services that meet the members needs</p> <p>Well attended face to face and virtual events</p> <p>A fully functional Guild calendar</p>

Risks / Issues
<p>Risk of Reducing membership due to lack of effective engagement</p> <p>Risk to the Guild income through reduced membership</p> <p>Risk to the Guild reputation through lack of membership engagement</p>

Date and Revision
11 September 2020 Revision 1



GUILD 2025 STRATEGY ROADMAP

Workstream	C Guild Communications
Duration	60 months
Lead	Phillip Clisham

The Guild 2025 Strategy Roadmap consists of six workstreams: Guild Structure & Management, Membership Engagement, Communications, Training & Education, Events & Services and Business Development which will be brought together to provide a 5 year strategy for the Guild.

The long-term aim of the Communications workstream is to ensure that the Guild's communications with its members are effective and its approach remains up to date.

Communications cover all aspects of the Guild's work so there is a need to ensure that the Guild is reaching all member types (contractors, consultants, manufacturers, asset owners, operators, and specialists providers) as well as non-members. Good communications are essential for the future of the Guild particularly in an environment of fast changing electronic technology and amendments to legislation that need to be complied with

High Impact		
	Easy to implement	Hard to implement
Low Impact		

Scope of this project & workstream

Workstream outcome(s) as required

- C1 Maintenance of the Guild Website Content – Development of a Member's area
- C2 Review and determine how technical information is shared through virtual mediums such as the website, video conferencing and webinars
- C3 Review the Guild social media presence and determine if the coverage is correct and the right platforms are being used
- C4 Review and provide proposals for website advertising
- C5 Review and provide proposals for the improvement of the Guild Newsletter – Identify how distribution can be increased.
- C6 Review and provide proposals for the improvement of the Online Directory. Review and provide recommendations on whether the printed version should be reintroduced or otherwise
- C7 Review the requirement for a Guild App and determine if it is appropriate and cost effective

Strategic Objective(s)

Improve the overall Guild communications by Updating the Guild's website improve the sharing of technical information and improving the Guild's social media presence

High Level Deliverable

Duration

- Provision of proposals to develop a process to enable content to be developed for the Guild's members area and its launch within the Guild website
- Provision of proposals and implementation plan for sharing technical information on virtual platforms
- Provision of the results of a review of the Guild's social media presence and proposals for the Guild's future presence on digital platforms
- Provision of proposals for advertising on the Guild's website
- Provision of a review of the Guild's newsletter and proposals for its improvement and widening of its circulation
- Provision of a review of the online members directory and proposals for its improvement and if a printed version should be made available.
- Provision of a review of if the provision of a Guild App is required, appropriate and cost effective and prepare proposals on the outcome of the investigation

6 months

9 months

9 months

6 months

12 months

9 months

12 months

Risks / Issues

Lack of activity will see Guild's presence and perceived value to membership fall. Guild will fail to effectively reach out to members or non-members. Members will not be able to network effectively or exchange knowledge with other members.

Benefits

H M L

Measure

- | | | |
|--|-------------------------------------|---|
| <ul style="list-style-type: none"> • Have procedures and systems for Guild communications • Have digital platforms for sharing technical information and Guild news • Improve income generation through the Guild website • Have effective communications to assist member retention and expansion | <p>H</p> <p>H</p> <p>H</p> <p>H</p> | <ul style="list-style-type: none"> • Greater interaction within the Guild • Increase in on line attendance at events • Increase in followers on social media • Increase in attendance at all Guild events |
|--|-------------------------------------|---|

Capacity Plan

Capability Plan

Stream Lead – Communications Committee Chair
 Communication Committee members including representation from the Board, PDN and PCF.
 Support from Guild HQ Events Team
 Active involvement from Interested members, Branches and Panels .

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies

Critical Success Factors

Guild 2025 Working Groups
 Guild Executive Subcommittee
 Guild Board
 Guild HQ Staff

To have effective and efficient communications that meet the members needs
 Well attended face to face and virtual events
 A fully functional means for knowledge transfer

Date and Revision

20 October 2020 Revision 2



GUILD 2025 STRATEGY ROADMAP

Workstream	C Guild Communications - C1
Duration	6 months
Lead	Phillip Clisham

High Impact	★
Low Impact	
	Easy to implement
	Hard to implement

Scope of this project & workstream	<p>C1 Maintenance of the Guild Website Content</p> <p>This project section scope is to undertake a full review of the procedures for the maintenance and development of the Guild's website content. This includes identifying areas for additions, amendments and improvement to provide members with a simple seamless virtual interface for information and news on the Guild.</p> <p>The key development required is the introduction of a members area</p> <p>Vision: The Guild website is the go-to place for information on pipeline related matters, whether that be contacts, training and education or news.</p> <p>The site will also capture the industry and Guild's history and record it for posterity</p>
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Workstream outcome(s) as required	<ol style="list-style-type: none"> a. Review the procedures for maintenance of the content of the Website and provide proposals for any amendments and additions b. Review the current content of the Guild website and provide proposals for amendments and additions c. Review and provide proposals for items that could be added to the website members area: These could include: <ol style="list-style-type: none"> i. Technical/Resource Hub: Case Studies, How to do various operations(tips, skills, how to do guides), educational videos, presentations ii Development of the Guild YouTube Channel iii Consider including a page with Tender /Project Invitations iv Consider including a page with Job Advertisements
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Benefits	H M L	Measure
• Have procedures and systems for Guild communications	H	• Improved communication with visitors to the Guild website
• Have effective communications to assist member retention and expansion	H	• Greater interaction within the Guild
• Have a members area on the Guild website to hold exclusive information for members	H	
• Generate income for the Guild as increased hits will increase potential advertising opportunities	H	

Strategic Objective(s)	Improve the Guild's website content. Develop and launch a website members area
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Capacity Plan	Capability Plan
Stream Lead – Communications Committee Chair Communication Committee members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Interested members, Branches and Panels .	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable	Duration
• Add an agenda items to the Communication Committee's meetings for website content and development of the member's area.	1 month
• Invite interested Guild members to Communication Committee' meetings to assist with the maintenance and development of website content strategy	1 month
• Develop proposals for procedures for the maintenance and development of the Guild website content	4 months
• Prepare a report on recommendations and a timescale for improvements to the Guild website content for consideration and approval by the Guild Executive and Board	2 months
• Develop a plan for the Guild website members area content, its implementation and launch	1 month

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Board Guild HQ Staff	To have effective and efficient communications that meet the members needs Well attended face to face and virtual events A fully functional means for knowledge transfer

Risks / Issues	<p>Lack of activity will see Guild's presence and perceived value to membership fall.</p> <p>Guild will fail to effectively reach out to members or non-members.</p> <p>Members will not be able to network effectively or exchange knowledge with other members.</p>
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Date and Revision	20 October 2020 Revision 2
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GUILD 2025 STRATEGY ROADMAP

Workstream C Guild Communications – C2

Duration 9 months

Lead Phillip Clisham

Scope of this project & workstream

C2 Exchange of Technical Information

This project section scope is to undertake a full review and determine how technical information is shared through virtual mediums such as the website, video conferencing, webinars and LinkedIn

Vision – The Guild becomes centre of a web that connects the technical panels, leading individuals, educational material and technical background

High Impact

Low Impact

Easy to implement

Hard to implement



Workstream outcome(s) as required

- a. Review how technical information is exchanged with the membership using virtual media and prepare proposals on how this can be improved
- b. Consider the best virtual mediums to be used and prepare proposals to improve and increase the exchange of technical information within the membership. Mediums to consider include:
 - i Webinars
 - ii Video conferencing
 - iii Website
 - iv Links to member's websites and technical support material

Benefits

- Have procedures and systems for the exchange of technical information using virtual platforms

H M L

H

H

H

H

Measure

- Introduction of systems using virtual platforms for the exchange of technical information between Guild members

Strategic Objective(s)

Improve the exchange of technical information within the Guild

High Level Deliverable

- Add an agenda item to the Communication Committee's meetings for the exchange of technical information within the Guild.
- Invite interested Guild members to Communication Committee' meetings to assist with the development of proposals for the improvement of technical information exchange
- Prepare a report on recommendations and a timescale for improvements to the exchange of technical information using virtual platforms for consideration and approval by the Guild Executive and Board

Duration

1 month

1 month

9 months

Capacity Plan

Stream Lead – Communications Committee Chair
 Communication Committee members including representation from the Board, PDN and PCF.
 Support from Guild HQ Events Team
 Active involvement from Interested members, Branches and Panels .

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies

Guild 2025 Working Groups
 Guild Executive Subcommittee
 Guild Board
 Guild HQ Staff

Critical Success Factors

To have effective and efficient communications that meet the members needs
 Well attended face to face and virtual events
 A fully functional means for knowledge transfer

Risks / Issues

Lack of activity will see Guild's presence and perceived value to membership fall.
 Guild will fail to effectively reach out to members or non-members.
 Members will not be able to network effectively or exchange knowledge with other members.

Date and Revision

20 October 2020 Revision 2



GUILD 2025 STRATEGY ROADMAP

Workstream	C Guild Communications – C3
Duration	9 months
Lead	Phillip Clisham

High Impact	Low Impact	Easy to implement	Hard to implement

Scope of this project & workstream	<p>C3 Social Media Presence</p> <p>This project section scope is to undertake a full review of the Guild's social media presence, determine if the coverage is correct and the right platforms are being used. Current platforms used are LinkedIn and Twitter</p>
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Workstream outcome(s) as required	<ol style="list-style-type: none"> Review how the Guild uses social media to interact with the Guild membership and non members and prepare proposals on how this can be improved Consider the virtual platforms that are currently being used by the Guild and prepare proposals on how to improve the use of these platforms and reconditions for the use of other platforms
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Benefits	H M L	Measure
<ul style="list-style-type: none"> Have a more effective and quicker method of interacting with the Guild membership and non-members 	H	<ul style="list-style-type: none"> Increased followers to the Guild's social media platforms Increase in feedback form the members and non-members
	H	
	H	
	H	

Strategic Objective(s)	Improve interaction and information exchange with the Guild's membership and non-members
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High Level Deliverable	Duration
<ul style="list-style-type: none"> Add an agenda item to the Communication Committee's meetings for the use of social media within the Guild. 	1 month
<ul style="list-style-type: none"> Invite interested Guild members to Communication Committee' meetings to assist with the development of proposals for the improvement of the Guild's social media presence 	1 month
<ul style="list-style-type: none"> Prepare a report on recommendations and a timescale for improvements to the Guild's use of social media for consideration and approval by the Guild Executive and Board 	9 months
<ul style="list-style-type: none"> Increased followers to platforms used 	12 months

Capacity Plan	Capability Plan
Stream Lead – Communications Committee Chair Communication Committee members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Interested members, Branches and Panels .	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Board Guild HQ Staff	To have effective and efficient communications that meet the members needs Well attended face to face and virtual events A fully functional means for knowledge transfer

Risks / Issues	<p>Lack of activity will see Guild's presence and perceived value to membership fall.</p> <p>Guild will fail to effectively reach out to members or non-members.</p> <p>Members will not be able to network effectively or exchange knowledge with other members.</p>
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Date and Revision	20 October 2020 Revision 2
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GUILD 2025 STRATEGY ROADMAP

Workstream	C Guild Communications – C4
Duration	6 months
Lead	Phillip Clisham

High Impact	★	
Low Impact		Easy to implement

Scope of this project & workstream	<p>C4 Website Advertising</p> <p>This project section scope is to undertake a full review and provide proposals for website advertising</p>
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Workstream outcome(s) as required	<p>a. Review how the Guild can use its website for advertising to gain income and prepare proposals on how this can be instigated. Consider corporate advertising, rolling banners and corporate logos with the directory</p>
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Benefits	H M L	Measure
<ul style="list-style-type: none"> Provide members with an opportunity to advertise their expertise and businesses Provide a new income stream for the Guild 	H	<ul style="list-style-type: none"> Uptake of the advertising opportunity by members New income for the Guild
	H	
	H	
	H	

Strategic Objective(s)	Provide exposure for Guild members and income for the Guild
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Capacity Plan	Capability Plan
<p>Stream Lead – Communications Committee Chair</p> <p>Communication Committee members including representation from the Board, PDN and PCF.</p> <p>Support from Guild HQ Events Team</p> <p>Active involvement from Interested members, Branches and Panels .</p>	<p>Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.</p>

High Level Deliverable	Duration
<ul style="list-style-type: none"> Add an agenda item to the Communication Committee's meetings for the use of the Guild website for advertising. 	1 month
<ul style="list-style-type: none"> Invite interested Guild members to Communication Committee' meetings to assist with the development of proposals for advertising on the Guild's website 	1 month
<ul style="list-style-type: none"> Prepare a report on recommendations and a timescale for the introduction of advertising on the Guild's website for consideration and approval by the Guild Executive and Board 	6 months

Dependencies	Critical Success Factors
<p>Guild 2025 Working Groups</p> <p>Guild Executive Subcommittee</p> <p>Guild Board</p> <p>Guild HQ Staff</p>	<p>To have effective and efficient communications that meet the members needs</p> <p>Well attended face to face and virtual events</p> <p>A fully functional means for knowledge transfer</p>

Risks / Issues	<p>Lack of activity will see Guild's presence and perceived value to membership fall.</p> <p>Guild will fail to effectively reach out to members or non-members.</p> <p>Guild will lose an opportunity to generate income</p>
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Date and Revision	20 October 2020 Revision 2
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GUILD 2025 STRATEGY ROADMAP

Workstream	C Guild Communications – C5
Duration	12 months
Lead	Phillip Clisham

High Impact	★	
Low Impact		Easy to implement

Scope of this project & workstream	<p>C5 Newsletter</p> <p>This project section scope is to undertake a full review and provide proposals for the improvement of the Guild Newsletter – Identify how distribution can be increased.</p>
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Workstream outcome(s) as required	<ol style="list-style-type: none"> Review the content and design of the Guild newsletter and prepare proposals on how this can be instigated. Consider gaining opinions from the membership in the development of new proposals Review how other publication are evolving - the key being to ensure that important articles are captures and read by the appropriate members Use Newsletter and website to help keep membership up to date with changes in standards and regulations.
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Benefits	H M L	Measure
<ul style="list-style-type: none"> Provide an effective publication to provide members with news and technical information 	H	<ul style="list-style-type: none"> Retention of Guild members Increase in the Guild membership Positive feedback from members

Strategic Objective(s)	Provide an effective newsletter for the provision of news and communication with Guild members
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Capacity Plan	Capability Plan
Stream Lead – Communications Committee Chair Communication Committee members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Interested members, Branches and Panels .	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable	Duration
<ul style="list-style-type: none"> Add an agenda item to the Communication Committee's meetings for development of the Guild newsletter.. 	1 month
<ul style="list-style-type: none"> Invite interested Guild members to Communication Committee' meetings to assist with the development of proposals for the Guild newsletter 	1 month
<ul style="list-style-type: none"> Prepare a report on recommendations and a timescale for the revision and update of the Guild newsletter for consideration and approval by the Guild Executive and Board 	12 months

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Board Guild HQ Staff	To have an effective and efficient means for communications with members Have a means for members to share their news and technical information

Risks / Issues	Lack of activity will see Guild's presence and perceived value to membership fall. Guild will fail to effectively reach out to members or non-members.
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Date and Revision	20 October 2020 Revision 2
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GUILD 2025 STRATEGY ROADMAP

Workstream	C Guild Communications – C6
Duration	9 months
Lead	Phillip Clisham

High Impact	★	
Low Impact		

Scope of this project & workstream	<p>C6 Members Directory</p> <p>This project section scope is to undertake a full review and provide proposals for the improvement of the Online Directory. Review and provide recommendations on whether the printed version should be reintroduced or otherwise</p> <p>Keep an open mind to whether this is still valuable in the industry today</p>
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Workstream outcome(s) as required	<ol style="list-style-type: none"> Review the content and design of the Guild members online directory and prepare proposals on how this can be instigated. Determine if a printed version of the Guild's members directory is required by the membership and prepare a report on the findings of this review Determine if the online Guild directory can be offered to be downloaded as a PDF
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Benefits	H M L	Measure
<ul style="list-style-type: none"> Provide an effective publication to provide members with information to interact with other members 	H	<ul style="list-style-type: none"> Retention of Guild members Potential to assist in increasing Guild membership

Strategic Objective(s)	Provide a user friendly on line members directory on the Guild website
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Capacity Plan	Capability Plan
Stream Lead – Communications Committee Chair Communication Committee members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Interested members, Branches and Panels .	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable	Duration
<ul style="list-style-type: none"> Add an agenda item to the Communication Committee's meetings for review of the Guild online directory.. 	1 month
<ul style="list-style-type: none"> Invite interested Guild members to Communication Committee' meetings to assist with the development of proposals for the Guild members directory 	1 month
<ul style="list-style-type: none"> Prepare a report on recommendations and a timescale for the revision and update of the Guild members directory for consideration and approval by the Guild Executive and Board 	9 months

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Board Guild HQ Staff	To have a a simple to use members directory for the Guild membership Have a means for members to gain information to communicate with each other

Risks / Issues	Lack of activity will see Guild's presence and perceived value to membership fall. Guild will fail to effectively reach out to members or non-members.
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Date and Revision	20 October 2020 Revision 2
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GUILD 2025 STRATEGY ROADMAP

Workstream	C Guild Communications – C7
Duration	12 months
Lead	Phillip Clisham

High Impact	
Low Impact	★
Easy to implement	Hard to implement

Scope of this project & workstream

C7 Membership App

This project section scope is to undertake a full review and determine if the development of a Guild App is required and appropriate – Key considerations are:

- Do we have the capacity to keep this up to date
- Will it be easy to use
- Development cost – will it be cost effective
- What would it do?

Workstream outcome(s) as required

- Review if the provision of a Guild App is required, appropriate and cost effective and prepare proposals on the outcome of the investigation

Benefits	H M L	Measure
<ul style="list-style-type: none"> Provide an effective means for Guild members to access the Guild information 	H	<ul style="list-style-type: none"> Retention of Guild members Potential to assist in increasing Guild membership

Strategic Objective(s)

Determine if there is a requirement for a Guild App

Capacity Plan	Capability Plan
Stream Lead – Communications Committee Chair Communication Committee members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Interested members, Branches and Panels .	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable

Duration

<ul style="list-style-type: none"> Add an agenda item to the Communication Committee's meetings for review of the provision of a Guild App. Establish a Specialist Working Group to review the provision of a Guild App 	1 month
<ul style="list-style-type: none"> Invite interested Guild members to join the Specialist Working Group Prepare a report on recommendations on the requirement and provision of a Guild App for consideration and approval by the, Communications Committee Guild Executive and Board 	1 month
	12 months

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Board Guild HQ Staff	Determine if a Guild App will provide members with a more efficient way to access Guild information

Risks / Issues

Lack of activity will see Guild's presence and perceived value to membership fall. Guild will fail to effectively reach out to members or non-members.

Date and Revision

20 October 2020 Revision 2



GUILD 2025 STRATEGY ROADMAP

Workstream	D Training & Education
Duration	5 Years
Lead	Dan Jefferson

High Impact	★
Low Impact	
Easy to implement	Hard to implement

Scope of this project & workstream

D Training and Education

The Guild 2025 Strategy Roadmap consists of six workstreams: Guild Structure & Management, Membership Engagement, Communications, Training & Education, Events & Services and Business Development which will be brought together to provide a 5 year strategy for the Guild.

The aim of this Training and Education workstream is to:

- Review the current methods employed by the Guild to deliver this scope.
- Determine ways to engage with schools, academic institutions and member companies offering apprenticeships
- To review, develop and expand the Guild's Professional Development network
- To improve the implementation of CPD activities and issuing of certificates
- To introduce mentoring to support members personal and professional development

Workstream outcome(s) as required

- D1 Engagement with Schools – STEM – (Science, Technology, Engineering or Mathematics in schools.)
- D2 Engagement with Academic Institutions
- D3 The role and development of the Guild PDN
- D4 Engagement with companies that offer apprenticeships and establish technical transfer and networking links with apprentices
- D5 Provide The Guild with a Strategy for the issue of Continuing Professional Development (CPD) attendance certificates and how to increase engagement with members through delivery of recognised CPD activities
- D6 Create a platform to receive support, direction and guidance for both personal and professional development through mentoring.

Benefits	H M L	Measure
• Increased membership	H	<ul style="list-style-type: none"> • Increase in Membership • Increase PDN activity • Higher Attendance at events • Greater interaction with members and other organisations
• Improved benefits for membership	H	
• Greater engagement with companies involved within the pipeline sector and related industries	M	
• Develop engagement with developing professionals and technicians	M	
• Wider reach for the Guild	M	
	M	

Strategic Objective(s)

Reviewing and updating the Guild's Strategies on the delivery of Training and Education to members and the wider community ...

High Level Deliverable

- Establish Specialist Working Groups to develop plans for all aspects of Training & Education
- Provide a proposal for Board Approval
- Prepare and Launch a new strategies and initiatives for Training & Education
- Manage the changes to become BAU

Duration

Capacity Plan

1 x workstream lead
3 to 4 persons (tbc) members including representation from the Board, PDN and PCF.
Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the roadmap
Unable to agree common approach to the development of the roadmap
Lack of engagement with other workstream groups and Guild committees

Dependencies

Guild 2025 Working Groups
Guild Executive Subcommittee
Guild Finance Committee
Guild PDN
Guild Membership
Guild HQ Staff

Critical Success Factors

Development of effective ways to deliver training and education to members and the wider community

Date and Revision

16 November 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	D Training and Education D1
Duration	5 yrs
Lead	Daniel Jefferson – Sandra Rolfe-Dickinson

Scope of this project & workstream

D1 – Schools – STEM – (Science, Technology, Engineering or Mathematics in schools.)

It is important to engage with young people on the benefits of a career in a technical field such as engineering, and the majority of professional institutions are doing this. The Institution of Civil Engineers (ICE) has an online Resource Sharing Centre, which offers materials to STEM ambassadors engaging with different age groups of children. The Institution of Mechanical Engineers (IMechE) also has a STEM Ambassador programme, encouraging volunteers to engage with schools. STEM ambassador skills are directly transferable to mentoring young people in the workplace, including apprentices, technicians and graduates.

High Impact	2	3
	1	
Low Impact	Easy to implement	Hard to implement

Workstream outcome(s) as required

Outputs of discussions indicate that school age children are probably too young to be the Guild's target. Suggest aiming at college / university aged young people. This activity to be joined with A2 – Academic Institutions, A4 – Apprenticeships & A6 – Mentoring while promoting the Guilds Membership STEM offerings.

- 1 Get Guild buy-in to dropping school based activity
- 2 Work with the above sections to develop Guild's offering
- 3 To develop links with colleges / universities offering pipelines / infrastructure modules

Strategic Objective(s)

Engage with young people, either in schools or in further education, to promote technical and engineering topics, specifically as they relate to pipelines and buried infrastructure.

High Level Deliverable

- Guild approval of the approach
- Work with other team members to develop the Guild's offering to colleges / universities
- To develop links with colleges / universities offering pipelines / infrastructure modules

Duration

- 1 month
- 12 months
- 12 months

Dependencies

Workstream lead and group
Guild members
Academic Institutions

Critical Success Factors

Approval from the Guild. Working with other team members

Benefits

- Promote the field of pipelines and infrastructure to young people in further education
- Provide industry with better qualified engineers and technicians

H M L

H
H
H

Measure (targets tbc)

- Develop resources to engage young people with pipelines and infrastructure
- Develop links with colleges / universities offering pipelines / infrastructure modules or courses

Capacity Plan

1 x workstream lead – Daniel Jefferson
3 to 4 persons (tbc) members including representation from the Board, PDN and PCF.
Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues

Lack of activity from the workstream. Lack of engagement with other workstream groups and Guild committees

Date and Revision

16 November 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	D Training and Education D2
Duration	5 yrs.
Lead	Daniel Jefferson – Nigel Curson

Scope of this project & workstream

D2 – Academic Institutions

- Provide links between the PIG, PDN and academic institutions offering pipeline related qualifications to proactively promote courses, promote PIG membership and create links between member companies and institutions to enhance career opportunities for graduates.
- Use these links to influence the courses offered and the curriculum.
- Leverage the experience of members to provide guest or permanent lecturers, mentors, ideas for dissertations and examiners.
- Facilitate a view on industry challenges and use the above links to promote pipeline related research.

High Impact	Easy to implement	★ 2
		★ 3
Low Impact	★	Hard to implement

Workstream outcome(s) as required

- An updated and focused affiliates list with contacts and a proactive and regular engagement with academic institutions and the PDN in the areas of sponsorship, career development, teaching and research.
- Guild link and pipeline specific content within sustainable, relevant undergraduate and postgraduate courses*
- Funding for research and PDN bursaries.

* Note collaboration with respect to new course is likely only to influence 2021 starters.

Strategic Objective(s)

Define pipeline engineering as a discipline. Link the guild to academic institutions. Increase the pipeline relevant content of courses. Improve sustainability by supporting with lecturers, promotion and research topics

Benefits

- Supports pipeline engineering as a discipline
- More relevant qualifications for employers and employees within the pipeline industry
- Academic options for the career path of individuals within the pipeline industry
- More career options for graduates

H M L

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H
H

Measure

- Uptake of universities of pipeline related content
- Recruitment of lecturers
- Pipeline specific courses available
- Graduated students/graduated student moving into pipeline careers

High Level Deliverable

- Academic institution engagement plan with roles and responsibilities and aim to promote, support pipeline content.
- Identification of sources of funding
- Forum for identifying industry challenges
- Catalogue of Guild members able to provide support to courses
- A mechanism for providing feedback/managing quality
- Catalogue of relevant and supported courses linked to affiliates, with careers, curriculum and research contacts
- Promotional material and a promotion plan

Duration

3 months
3 months
12 months
3 months
3 months
1 month

Capacity Plan

1 x workstream lead – Daniel Jefferson
3 to 4 persons (tbc) members including representation from the Board, PDN and PCF.
Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues

Lack of activity from the workstream team. This needs a very proactive, even evangelical approach.

Dependencies

Workstream lead and group
Guild members
Academic Institutions

Critical Success Factors

Ability to influence academic institutions and guild members to invest time and money

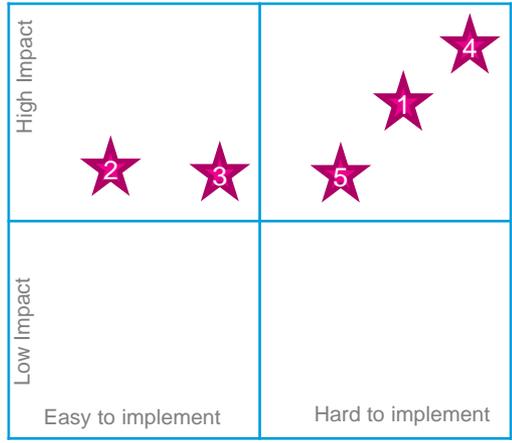
Date and Revision

16 November 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	D Training and Education D3
Duration	5 years
Lead	Kyle Ingram



Scope of this project & workstream

D3 – PDN
 The Guild 2025 Strategy Roadmap consists of six workstreams – this page supports the Training and Education Workstream with consideration to the Professional Development Network as one of the identified focal points.

D3 – PDN, The overall and fundamental aim of the Professional Development Network is to ensure that the Pipeline Guild continues to exist and thrive in the future. This project is to implement a plan that provides the Pipeline Guild with such continuity; through ensuring that the current members of the PDN are prepared and capable to not only lead the guild in the future, but also become effective leaders within the Pipeline Industries.

The scope of the project is therefore to put the building blocks in place to deliver this. Through a re-establishment of the PDN nationally we will collate and standardise best practise. This project will introduce financial support to PDN members & utilise technology to collaborate more effectively. The standardised documentation and guidelines, with the new introduction of mentoring would provide the PDN reps and members with structure and content in order to more easily focus on growing their regional PDN Members and Involvement.

- Workstream outcome(s) as required**
- 1 – To review and re-establish the PDN and its purpose.
 - 2 – Building a foundation nationally - creation of a standard set of support documents, templates, structure and role definitions on both a national and regional / branch level.
 - 3 – Establishment of a PDN members area on the Pipeline Guild's website / Shared Area.
 - 4 – Introduction of a PDN budget / bucket of money available for covering PDN Expenses – governance and policy supported.
 - 5 – Initiation of a more effective PDN Training and Mentoring Programme – link to A6,

Strategic Objective(s)

To build a professionally developed network that is prepared and driven to effectively take on the future responsibility in leading the Pipeline Guild and the industries, companies and individual members it strives to represent.

Benefits	H M L	Measures (targets tbc)
<ul style="list-style-type: none"> Organisational continuity – securing the future of the Pipeline Guild and continued development of the industries future leaders. 	H	<ul style="list-style-type: none"> Membership Numbers - nationally. Membership numbers – regionally. Paper competition entries. Number of PDN events – training, technically and socially.
<ul style="list-style-type: none"> Member organisations and PDN members would obtain more value from what the Pipeline Guild Offer. 	H	<ul style="list-style-type: none"> Budgets used effectively / adds value to PDN members. PDN Panel members strength and engagement levels.
<ul style="list-style-type: none"> Standardisation, structure and more resource available to the PDN Panel. 	H	<ul style="list-style-type: none"> Mentorship programme – number of mentors / mentees.

High Level Deliverable	Duration
<ul style="list-style-type: none"> Review the current PDN and undertake gap analysis of Structure, Role Support, Guidance Documentation and Templates. 	3 Months
<ul style="list-style-type: none"> Create a library of standardised PDN documentation, roles, guidelines and templates. 	3 Months
<ul style="list-style-type: none"> Creation and implementation of a PDN Members area through either pipeline guilds website / Shared Area. 	1 Year
<ul style="list-style-type: none"> Establishment of a governed PDN budget & source of funding. 	2-3 Years
<ul style="list-style-type: none"> Introduction of a PDN Mentorship programme 	12-18 Months
<ul style="list-style-type: none"> Effective PDN Training Programme 	3-5 Years

Capacity Plan	Capability Plan
1 x workstream lead PDN Chair PDN Regional Reps Support from Guild HQ & CEO Support from T&D Lead	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the roadmap
 Unable to agree common approach to the development of the roadmap
 Lack of engagement with other workstream groups and Guild committees
 PDN not involved or disengaged within certain regions.
 Lack of regional branch level engagement.
 PDN members involvement decrease due to own company decision making.

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive & Board, PCF Guild Finance Committee Guild HQ Staff PDN National and Regional. Membership	Establishment of revised Guild vision, company documentation, management structure and headquarters infrastructure and management

Date and Revision

16 November 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	D Training & Education D4
Duration	5 years
Lead	Daniel Jefferson - Eliot Bailey

High Impact		★
Low Impact		
	Easy to implement	Hard to implement

Scope of this project & workstream

D4 - Apprenticeships

Engage with big companies within the pipe industry that currently offer apprenticeships, eg cadent, UU etc. Establish common ground that can benefit both the guild and the companies. Begin dialogue about how participation in the guild could become part of these apprenticeships.

The short-term objective for this part of the road map is to identify the main companies that we are wanting to connect with, and establish links with the head of these apprenticeships in each of these companies. Look at methods of engagement with the apprentices as these networking opportunities could be advantageous.

Workstream outcome(s) as required

- 1 - Create a common approach for engagement with the Guild membership on apprenticeship engagement opportunities.
- 2 - Establish measures for success on how this engagement will benefit the guild and its membership.
- 3 - Create a standard process for promoting Pipeline apprenticeships and engagement method to support and enable networking
- 4 – Trail this process and check it is suitable and sufficient
- 5 – Launch the process and measure the success.
- 6 – Move from “Change” into BAU.

Benefits	H M L	Measure (targets tbc)
<ul style="list-style-type: none"> Increase participation in Guild events and increase membership to the guild. Learn from new techniques and methods being taught to the apprentices. Increase participation in PDN committees and contingency. Bring the average age of the guild down, ensuring its future. 	H	<ul style="list-style-type: none"> Membership numbers regionally Membership numbers nationally Average membership ages. PDN committee memberships regionally PDN committee memberships nationally
	H	
	H	

High Level Deliverable

- Research and create a common engagement approach
- Establish the measure for success
- Issue paper to the Guild Board for acceptance on proposal
- Create a standard process for promoting pipeline apprenticeships and engagement for apprentices
- Trail this approach and check
- Launch process and measure the success
- Move from change into BAU

Duration

- 1 month
- 3 months
- 9 months
- 9 months
- 4 months
- 12 months
- 12 months

Capacity Plan

1 x workstream lead
3 to 4 persons (tbc) members including representation from the Board, PDN
Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues

Lack of activity from lead, lack of engagement from companies.

Dependencies

Guild 2025 Working Groups
Guild Executive Subcommittee
Guild Finance Committee
Guild Audit Chair.
Guild HQ Staff

Critical Success Factors

Establishment of revised Guild vision, company documentation, management structure and headquarters infrastructure and management

Date and Revision

16 November 2020 Revision 3



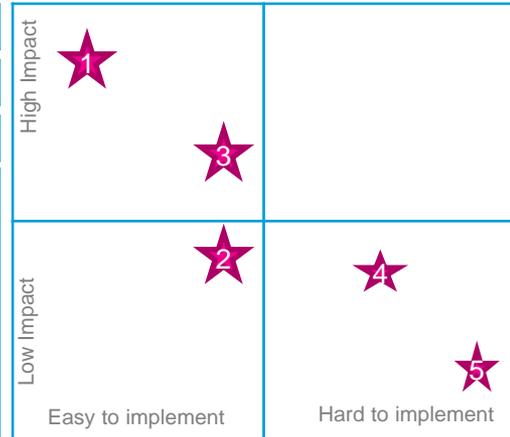
GUILD 2025 STRATEGY ROADMAP

Workstream	D Training & Education D5
Duration	5 Years
Lead	Daniel Jefferson – Nick Preston

Scope of this project & workstream

D5. CPD

Provide The Guild with a coherent Strategy on when and how to issue members with a Continuing Professional Development CPD attendance certificate.
Increase engagement of members through delivery of recognised CPD activities



Workstream outcome(s) as required

1. Guild CPD Statement and Widely communicated that PIG provides CPD
2. Register of CPD activity and events offered by The Guild
3. HQ and 'relevant person' to approve Guild issued CPD certificates
4. Requirements of Continuing Professional Development (CPD) typically required of Professional Bodies operating in the pipelines sector
5. Formal 3rd party Accreditation of CPD or not?

Strategic Objective(s)

Update the current Guild Policy & Procedures for the type, frequency, cost, attendance at it National and Regional and Panel Events and other services provided by Panel members and HQ staff.

Benefits

- To maximise exposure of The Guild in providing high levels of CPD
- To engage with members in their own CPD
- To engage with Corporate members to provide their staff with CPD
- To assist PDN sector of the Guild in their training

H M L

H
H
H

Measure

- No of CPD events/annum
- No of CPD events/branch
- No of CPD Certificates issued

High Level Deliverable

- Strategy Paper
- CPD Activity Log - Register
- CPD Awareness Campaign in Guild Comms

Duration

3 Months
6 Months
3 Months

Capacity Plan

1

Capability Plan

action plan required to keep interest.

Risks / Issues

Issue that Guild Exec fail; to take the opportunity of the value of promoting themselves through providing recognised CPD events and activities

Dependencies

None

Critical Success Factors

CPD given as reason for Guild Membership

Date and Revision

16 November 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	D Training and Education D6
Duration	5 years
Lead	Daniel Jefferson

High Impact	Low Impact	Easy to implement	Hard to implement



Scope of this project & workstream

D6 Mentoring

PIG mentoring – help members connect by matching suitable mentors and mentees. Capture, share and retain knowledge and experience amongst the membership. Create a platform to receive support, direction and guidance for both personal and professional development.

The short term objective for this element within the Guild 2025 road map is to connect people who can share knowledge, overcome challenges, gain insight to experiences and support development utilising the existing and future membership of the Guild.

Workstream outcome(s) as required

- 1- Create a platform for success – link and learn from industry bodies, review and engage with other industry bodies on mentoring programmes – Establish links, Best practice and preferred approach.
- 2 - Establish mentoring process – How to become a mentor / mentee. Create criteria for individuals to become either mentor or mentee. Process touch points and enabling factors including IT, location and inclusivity items such as PDN budget / expenses (link with A3 PDN)
- 3 - Develop “profile” platform for linking mentors and mentees – Utilise existing PIG platforms where possible or enhance with additional elements as appropriate.
- 4 – Prepare guidance for mentors and mentees – Create a standard set of documents, video messages etc which support the mentors and mentees
- 5 – Launch programme and reflect upon system – Learn from early adaptors and improve as required.
- 6 – Move from change to BAU

Benefits	H M L	Measure
<ul style="list-style-type: none"> • Shared learning across the guild • Additional offering to all members • Increased networking opportunity for the membership 	H	
<ul style="list-style-type: none"> • Cross industry knowledge capture and innovation 	H	
<ul style="list-style-type: none"> • Registered Guild subscribers increased • Professional development and life mentor programme (not always technical) 	H	

High Level Deliverable

- 1- Create a platform for success – link and learn from industry bodies
- 2 - Establish mentoring process – How to become a mentor / mentee
- 3 - Develop “profile” platform for linking mentors and mentees
- 4 – Prepare guidance for mentors and mentees
- 5 – Launch programme and reflect upon system
- 6 – Move from change to BAU

Duration

- | |
|-----------|
| 6 month |
| 1 year |
| 18 month |
| 2 years |
| 30 months |
| 3 years |

Capacity Plan	Capability Plan
1 x workstream lead – Daniel Jefferson 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies

Guild 2025 Working Groups
Guild Executive, Board and PCF
Guild Finance Committee
Guild HQ Staff
Guild Panels and Committees
Membership

Critical Success Factors

Establishment of revised Guild vision, company documentation, management structure and headquarters infrastructure and management

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the roadmap
Unable to agree common approach to the development of the roadmap
Lack of engagement with other workstream groups and Guild committees
Lack of engagement / desire from the Guild Membership

Date and Revision

16 November 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	E. Guild Events & Services
Duration	TBC
Lead	Norman Howell

High Impact	
Low Impact	
Easy to implement	Hard to implement

Scope of this project & workstream

The Guild 2025 Strategy Roadmap consists of six workstreams: Guild Structure & Management, Membership Engagement, Communications, Training & Education, Events & Services and Business Development which will be brought together to provide a 5 year strategy for the Guild.

The aim of the Guild Events and Services workstream is to undertake a review of national and regional events to ensure they meet the expectations of the membership, create a 3 year rolling programme of all Guild events, review the platforms on which we host events, ensure that events are tailored for all Guild members with an emphasis focused on the PDN, Establish a framework to ensure events are financially stable and cost effective. Review current services and determine how these can be improved to prove greater value for the Guild membership. .

Workstream outcome(s) as required

- E1 To undertake a full review of both Nationally & Regionally held events.
- E2 Development of a 3-year programme for national events and continued maintenance of an effective and up-to-date calendar for members.
- E3 To review and update Guild Policy & Procedures and Terms of Reference in relation to the type, frequency and cost (including sponsorship) for all events and services.
- E4 To review and establish an Industry-Leading platform for hosting virtual events and online webinars.
- E5 To review current provided services offered and consider the provision of new value-adding services for Guild Members.
- E6 To create tailored events and services that attract and retain a membership audience of greater diversity and backgrounds.

Strategic Objective(s)

Update the current Guild Policy & Procedures in relation to the type, frequency, cost, potential attendance at National, Regional and Panel Events and services provided by Branches, Panels and HQ..

Benefits

- To ensure its events are fit for purpose
- Added support and guidance for our members and committees to run events.
- Modernised and more easily available events through utilising technology.
- Provision of events and services to members that cannot attend in-person events.
- Tailored events & services to support and encourage diversity.
- Possible increased attendance from PDN members to online events.
- Increased no. of joint events with other organisations and members.
- Webinar events can be chargeable and sponsored with low cost.

H M L

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Measure

- Attendance at In-Person Events – nationally and regionally
- Attendance to Online Webinars and Conference Calls
- Have a review process for analysing the success of each event.
- Website traffic through the Guild's Website and YouTube content.
- Events are financially stable and cost effective.

High Level Deliverable

Duration

- | | |
|--|-----------|
| <ul style="list-style-type: none"> • Undertake a full review of past and future events, including the capture of members opinions in a survey / questionnaire. | 14 months |
| <ul style="list-style-type: none"> • Issue to the group the existing standard documentation for review | 1 month |
| <ul style="list-style-type: none"> • Update and provision of Events procedures and guidance for National, Regional and Panel events. (to include organisation and finance) | 12 months |
| <ul style="list-style-type: none"> • Create an industry leading platform for Online Events, Content and Webinars. | 12 months |
| <ul style="list-style-type: none"> • Development of a 3-year programme for national events | 6 months |
| <ul style="list-style-type: none"> • Establish an effective members only function on the Guild website to provide value-adding services and events for Guild Members. | 3 months |
| <ul style="list-style-type: none"> • To drive and increase diversity at all events and Guild related functions. | 12 months |
| <ul style="list-style-type: none"> • Creation of a database / archive of past videos / topics of speakers and their presentations for future use and availability to members. | 18 months |

Capacity Plan

1 x Workstream Lead
3-4 persons(tbc) members including representation from the Board, PDN and PCF.
Support from Guild HQ Events Team
Active involvement from Regional Branches.

Capability Plan

Ensure all involved want to be involved and have an interest in the end result.
Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies

Guild 2025 Working Groups
Guild Executive Subcommittee
Guild Finance Committee.
Guild HQ Staff
Guild Branches & Technical Panels

Critical Success Factors

To have effective and efficient services that meet the members needs
Well attended face to face and virtual events
A fully functional Guild calendar

Risks / Issues

Budget pressures due to reduced number of subscriptions and events and cost savings
Risk of retaining membership and financial stability due to future uncertainties

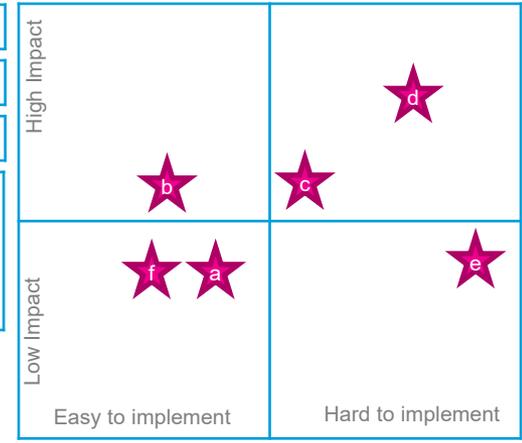
Date and Revision

30 June 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	E1. Guild Events & Services
Duration	6 Months - 1 Year
Lead	Norman Howell



Scope of this project & workstream	<p><u>E1 Review of National & Regional Events.</u></p> <p>This project section scope is to undertake a full review of all events held by the Guild, identifying key elements of success, areas for improvement and ensuring their return on investment facilitates the Guilds future success for their members.</p>
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Workstream outcome(s) as required	<ol style="list-style-type: none"> Undertake a full internal review of events & services undertaken over the past couple of years for both national and regional events. Undertake PESTLE analysis of external factors impacting on Guild Events and Services Obtain an accurate and honest view of feedback from our membership through conducting national / regional surveys, focus groups and workshops. Creation of 2025 Event & Services Strategy, Goals and Event Plan, E2. Events Team Roles & Skills Gap Analysis to align in delivering Strategy. Creation of KPI Metrics and Annual Review process for measuring the success of events on a frequent and ongoing basis.
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Strategic Objective(s)	To undertake a full review of both Nationally & Regionally held events to ensure they are fit for purpose, meeting our member's needs and aligning to the Guilds Strategic Roadmap.
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Benefits	H M L	Measure (targets tbc)
<ul style="list-style-type: none"> To ensure its events & services are fit for purpose Improved understanding of both national and local membership needs / wants. Ensuring Events Topics and Services remain prevalent and up-to-date. KPI Metrics and process to encourage continuous improvement. Ensuring PIG Events team are continually supported and capable of delivering future events. 	<p>M</p> <p>H</p>	<ul style="list-style-type: none"> Number of Survey responses and members feedback. Board sign-off of review feedback

High Level Deliverable	Duration
<ul style="list-style-type: none"> Establish a Working Group to undertake the following: <ul style="list-style-type: none"> A review Internal Events & Services Analysis of past national, regional and panel events – Attendee No.s Membership Reach / Types / Locations / ROI / Platforms Undertake a PESTLE Analysis to determine external factors impacting Guild Events and Services Gain effective membership feedback on Guild Event and Services through :- A full membership survey, a members workshop, regional focus groups Undertake an analysis on results received to gain an understanding of Membership needs 	1 Month
<ul style="list-style-type: none"> Working Group to utilising member feedback and analysis to determine <ul style="list-style-type: none"> Event & Services Strategy, targets and Event Plan Events Team Roles and Skills Gap Analysis to align to delivering strategy. 	6 Months
<ul style="list-style-type: none"> Working Group to Create KPI Metrics and Annual Review process for measuring the success of events on a frequent and ongoing basis. 	3 Month
	3 Month

Capacity Plan	Capability Plan
1 x Workstream Lead 3-4 persons(tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Regional Branches and Panels.	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee. Guild HQ Staff Guild Branches & Technical Panels	Establish a programme of face to face and virtual events that are well attended and meet the members requirements

Risks / Issues	Risk that personal opinions and interpretations could influence internal review and overall strategy.
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Date and Revision	30 June 2020 Revision 3
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GUILD 2025 STRATEGY ROADMAP

Workstream	Guild Events & Services – E2
Duration	TBC
Lead	Norman Howell

High Impact		
Low Impact		
	Easy to implement	Hard to implement



Scope of this project & workstream

E2 Guild Events Programme

- Development of a 3-year rolling programme for all Guild events
- Identify the best platform for hosting the programme to provide ease of access to Guild Committees & members
- Establish a procedure for the continued updating of the programme to ensure an effective and up-to-date calendar of events is maintained.

Workstream outcome(s) as required

- E2 To review and make recommendations on the following::
- Design, build and establish a Guild Calendar for all events on a 3 year rolling programme basis
 - Review potential hosting platforms for the calendar and select the most appropriate based on the following:
 - Ease of use and flexibility to maintain simply
 - Accessibility for Guild HQ staff, Committees and Members but with tools to allow HQ management and avoid universal ability to edit and add entries.
 - Review and determine the overall content of the calendar. Consider including key events of other similar organisations together with National and International events/celebrations that may be of interest to Guild members.

Benefits

- Have a visible calendar of Guild events
- Allows Guild committees to plan meeting and event schedules avoiding clashes.
- Allows members to plan their schedules into the future
- Provides similar organisations with visibility of Guild events to prevent clashes

H M L

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Measure

- Website traffic through the Guild's Website and YouTube content.
- Attendance to Online Webinars and face to face events
- Membership feedback on use and effectiveness of Guild events calendar

Strategic Objective(s)

Establish a Guild Calendar of Events based on a 3 year rolling programme

Capacity Plan

1 x Workstream Lead
3-4 persons(tbc) members including representation from the Board, PDN and PCF.
Support from Guild HQ Events Team
Active involvement from Regional Branches.

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable

- Establish a working group to include Guild members and members of HQ staff to develop a 3 year rolling Guild Calendar
- Establish a meeting schedule with the aim of reviewing and developing recommendations for the Guild's Calendar and hosting platform
- Prepare a report on recommendations and a timescale for implementation of the Guild calendar for consideration and approval by the Guild Executive and Board

Duration

3 months
6months
3 months

Dependencies

Guild 2025 Working Groups
Guild Executive Subcommittee
Guild Finance Committee.
Guild HQ Staff
Guild Branches & Technical Panels

Critical Success Factors

Have an events calendar that provides up to date information to members

Risks / Issues

Risk of future uncertainty for events and services in to the future – Ensuring maintenance of the calendar becomes a routine matter so there is no risk of it becoming out of date.

Date and Revision

30 June 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	Guild Events & Services – E3
Duration	TBC
Lead	Norman Howell

High Impact	Low Impact	Easy to implement	Hard to implement



Scope of this project & workstream	<p>E3 Guild Policy & Procedures relating to Events and Services To review and update Guild Policy & Procedures and Terms of Reference in relation to the type, frequency and cost (including sponsorship) for all events and services</p>
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Workstream outcome(s) as required	<p>E3 To review and update as required the following in relation to events and services:</p> <ol style="list-style-type: none"> Guild Company Polices, Processes and Procedures (Articles of Association, SOPS, TORS etc) Guild Corporate Polices Governance (National, Branch & Panel)
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Strategic Objective(s)	Review and update the current Guild polices, processes, procedures, company policies & governance in relation to events and services for the next 5 years
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Benefits	H M L	Measure
<ul style="list-style-type: none"> Have a revised suite of documents that outline Guild Company Policies, Processes and Procedures, and support the Guild's events & services 	H	<ul style="list-style-type: none"> Have a suite of documents that are accessible and easy to understand that outline the following: <ul style="list-style-type: none"> Guild Company Policies, Processes and Procedures, Corporate Policies

High Level Deliverable	Duration
<ul style="list-style-type: none"> Establish a Specialist Working Group comprising of persons with experience in company governance and risk analysis. 	1 month
<ul style="list-style-type: none"> Issue to the group the existing standard documentation for review 	1 month
<ul style="list-style-type: none"> Working Group will develop a strength and weakness analysis template that will be forwarded to all Guild, Branch, Panel and Specialist Committees 	2 months
<ul style="list-style-type: none"> Establish a meeting schedule to utilise feedback on the strengths and weaknesses of participation within the Guild to develop recommendations on an updated structure for the Guild and the roles of its officers 	3 month
<ul style="list-style-type: none"> Review and recommend amendments to Guild company documentation, governance and management structure 	6 months
<ul style="list-style-type: none"> The Working Group will prepare a report on the actions required and timescale for implementation for approval by the Executive and the Board 	9 months
<ul style="list-style-type: none"> Complete update of all approved changes to Guild documentation 	2 months

Capacity Plan	Capability Plan
1 x Workstream Lead 3-4 persons(tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Regional Branches.	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee. Guild HQ Staff Guild Branches & Technical Panels	Establishment of revised Guild Company Policies, Processes and Procedures, Corporate Policies and Legal Support

Risks / Issues
<ul style="list-style-type: none"> Lack of activity from the workstream team leading to delay in finalising the roadmap Unable to agree common approach to the development of the roadmap Lack of engagement with other workstream groups and Guild committees

Date and Revision
30 June 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	E. Guild Events & Services – E4
Duration	6 Months - 1 Year
Lead	Norman Howell

High Impact		
Low Impact		Easy to implement

Scope of this project & workstream	<p>E4 Virtual Events and Webinars To review and establish an Industry-Leading platform for hosting virtual events and online webinars.</p> <p>This project section scope is to undertake a full review of the following:</p> <ol style="list-style-type: none"> Current Guild events hosted on virtual media platforms The type and content of events that the Guild could host virtually The available virtual platforms for Guild events and particularly webinars <p>The aim is to establish an easy to use virtual platform to allow the Guild to engage with its membership</p>
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Workstream outcome(s) as required	<ol style="list-style-type: none"> Review and decide which platform to use for webinars/online events Set up webinar management process – e.g. registration form on website, automatic email confirming registration to webinar – ensure GDPR compliant to build Guild mailing list – collation of attendees Set out guidelines and good practice for webinars/online events – e.g. how many webinars per month/quarter etc. content – no sales pitches Produce a webinar package and appropriate material to promote it – decide on pricing strategy (members vs non-members) – promotion in eblast, social media etc. Promote webinar packages to member companies – gauge initial interest and then potentially widen to non-members(?) Set up webinar/online events calendar – Links to E2 Produce repository area for members to access previous webinars – free access to approved Universities? Stop and review after the first few initial webinars – collect feedback from attendees, hosts etc.
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Strategic Objective(s)	To review and establish an Industry-Leading platform for hosting virtual events and on-line webinars
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High Level Deliverable	Duration
<ul style="list-style-type: none"> Establish a working group to include Guild members and members of HQ staff to review and establish a virtual platform for Guild events. This will include preparing management procedures and content guidelines. 	3 months
<ul style="list-style-type: none"> Establish a meeting schedule with the aim of reviewing and developing recommendations for the Guild's hosting platform and virtual events 	6 months
<ul style="list-style-type: none"> Undertaken a membership consultation to gain members feedback on current events and what they want for the future. 	3 months
<ul style="list-style-type: none"> Prepare a report on recommendations and a timescale for implementation of the Guild's Virtual Events for consideration and approval by the Guild Executive and Board 	6 months

Risks / Issues	<ul style="list-style-type: none"> Need to get a balance between face to face events vs online events/webinars. Need to ensure we do not bombard people with webinars – better to have quality over quantity
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Benefits	H M L	Measure
<ul style="list-style-type: none"> Additional revenue generator Easier for people to attend Cost effective way to connect with members/non-members 		<ul style="list-style-type: none"> Number of attendees on the webinars Temperature check survey

Capacity Plan	Capability Plan
1 x Workstream Lead 3-4 persons(tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ Events Team Active involvement from Regional Branches and Panels.	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee. Guild HQ Staff Guild Branches & Technical Panels	Virtual platform, management procedure and guidelines establish Virtual events programme is established and well accepted by the membership

Date and Revision	30 June 2020 Revision 3
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GUILD 2025 STRATEGY ROADMAP

Workstream	E - Events and Services – E5
Duration	
Lead	Norman Howell

High Impact	Low Impact	Easy to implement	Hard to implement

Scope of this project & workstream

E5 Provision of New Value-Adding Services for Guild Members

To review current provided services offered and consider the provision of new value-adding services for Guild Members

This project section scope is to undertake a full review of current service provision and consider other value added member services such as::

- Advertise job vacancies on website
- Have a formal portal for technical questions and help
- Have a portal for procurement events
- Formal library of industry standards
- Innovations portal

Consider if income streams can be generated from new services & benefits particularly through sponsorship

Workstream outcome(s) as required

- Review current member services and prepare recommendations on retention and any changes that may be required
- Review potential new value added services for members such as: Utilising the Guild website to establish portals for advertising job vacancies, technical questions and help, procurement events, a formal library of industry standards / commercial terms and conditions and Innovations
- Determine process and procedures to establish these new services and if a revenues stream can be generated through more sponsorship opportunities

Strategic Objective(s)

To review services offered to Guild members and determine if they can be enhanced

Benefits	H M L	Measure
a. Additional Membership value & potential income generator	H	Increased benefits for members
b. Additional membership benefit at no cost	H	

High Level Deliverable

Duration

<ul style="list-style-type: none"> Establish a working group to include Guild members and members of HQ staff to review existing services and identify further value added services to enhance the offering provided to members. 	3 months
<ul style="list-style-type: none"> Establish a meeting schedule with the aim of reviewing and developing services for members 	1 month
<ul style="list-style-type: none"> Undertaken a membership consultation to gain members feedback on current services and what they want for the future. 	4 months
<ul style="list-style-type: none"> Prepare a report on recommendations and a timescale for implementation of the Guild's services for consideration and approval by the Guild Executive and Board 	12 months

Risks / Issues

Determine if current Guild IT infrastructure can accommodate additional content
 Establish if proposed additional content requires any legal input
 Keeping deliverables up to date
 Risk of lack of capacity to drive the projects

Capacity Plan	Capability Plan
1 x workstream lead 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee. Guild HQ Staff Guild Branches & Technical Panels	Provision of a wide range of member benefits Potential additional income – could support additional Guild staff

Date and Revision
30 June 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	E - Events and Services – E6
Duration	
Lead	Norman Howell

High Impact	
	★
Low Impact	
	Easy to implement
	Hard to implement

Scope of this project & workstream

E6: Gender & Cultural Diversity

To create tailored events and services that attract and retain a membership audience of greater diversity and backgrounds. The objective of the Guild is to have events and services that promote inclusion and equality for all members irrespective of their gender, sexual orientation, race and ethnicity, social background, disability, age, religion or any other.

Workstream outcome(s) as required

1. Determine how the Guild can ensure that it has a clear strategy and commitment to build and maintain a diverse and inclusive culture.
2. Review all Guild documentation and virtual platforms to ensure that all content is gender neutral.
3. Review and evaluate the diversity and Inclusion of the Guild Board and Executive with the aim to develop a process to change the gender, racial and ethnic representation balance on the Guild Board and committees
4. Review the Guild's technical and social events programme (both face to face and virtual)and consider what further events can be added that are directly focused on Diversity and Culture i.e.. Women in Construction, Gender pay gap, Ethnicity in Construction etc.
5. Consider how the Guild can encourage engagement and wider participation in Guild activities from minority gender racial and ethnic groups working within the pipeline and associated industries.
6. Review what all members want from the Guild through a programme of engagement such as member surveys, develop focus groups and improve services offered (opportunities for technicians, mentoring etc.).
7. Review how greater engagement can be achieved from younger Guild members and the role the PDN can play in developing an attractive sustainable cultural future for the Guild

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the strategy
 Unable to agree common approach to the development of the strategy
 Lack of engagement with other workstream groups and Guild committees

Benefits

- Wider representation provides greater diversity and equality within the Guild
- Events and services that promote inclusion and equality
- Promotes greater participation from all members

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Measures

- Greater diversity on Guild Board and committees

Strategic Objective(s)

To review services and events offered to Guild members to ensure that they promote inclusion and equality for all members irrespective of their diversity or gender.

Capacity Plan

1 x workstream lead
 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF.
 Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable

- Establish a Working Group to consider how the Guild should manage the diversity and gender balance
- Establish a meeting schedule with the aim of reviewing and developing process for the Guild to follow to manage the diversity and gender balance
- Undertaken a membership consultation to gain members feedback on what they want for get from events.
- Prepare a report on recommendations and a timescale for implementation of the Guild's services for consideration and approval by the Guild Executive and Board

Duration

3 months
1 month
4 months
12 months

Dependencies

Guild 2025 Working Groups
 Guild Executive Subcommittee
 Guild Board.
 Guild HQ Staff
 Guild Branches & Technical Panels

Critical Success Factors

Wider gender and diverse representation on Guild Board and Committees
 Provision of a wide range of events that appeal to all members

Date and Revision

30 June 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	F. Business Development
Duration	
Lead	Robert Murray

High Impact	
Low Impact	
Easy to implement	Hard to implement

Scope of this project & workstream

F Business Development

The Guild 2025 Strategy Roadmap consists of six workstreams: Guild Structure & Management, Membership Engagement, Communications, Training & Education, Events & Services and Business Development which will be brought together to provide a 5 year strategy for the Guild.

The aim of the Guild Business Development workstream is to develop a business development strategy/procedure to increase membership and review what events attract members to the Guild. This will include a review of the following:

- How the Guild interacts with its members or prospective members to make the Guild more visible and improve awareness of events
- The current Guild literature and propose updates
- Determine how to expand the membership. How to get access to larger companies and inform their employees of Guild activities
- How to expand the coverage of the Guild outside of its traditional pipeline membership base
- How can the Guild improve awareness of events within the membership & how it advertises & sells events to improve revenue streams
- How can the Guild develop a process to engage with both professionals and technicians/tradespersons
- How can the Guild create links with armed forces, prison service etc to act as a conduit for the entry of personnel to the pipeline industry
- How the Guild can engage with and influence Government

Workstream outcome(s) as required

- F1.1 Develop a Business Development Strategy/Procedure for the Guild
- F1.2 Review how the Guild Interacts with Members
- F1.3 Review the Guild's Marketing Literature
- F2 Review How to Make the Guild more Visible
- F3 Review Expanding the Scope of the Coverage of the Guild from Pipeline Technology to Other Related Areas
- F4 Review How the Guild Interacts with Professionals and Technicians
- F5 Review Links with Armed Forces, Prison Service as a Conduit for Entry Into the Pipeline Industry
- F6 Review the Guild's Advertising of Events
- F7 Develop a Strategy for Engaging with Government and its Agencies

Benefits

- Increased membership
- Improved benefits for membership
- Greater engagement with companies involved within the pipeline sector and related industries
- Better visibility of events and event programme
- Wider reach for the Guild

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Measure

- Increase in Membership
- Higher Attendance at events
- Greater interaction with members and other organisations

Strategic Objective(s)

Reviewing and updating the Guild's Business Development Strategy...

High Level Deliverable

- Establish Specialist Working Groups to develop plans for all aspects of Business Development
- Provide a proposal for Board Approval
- Prepare and Launch a new process for business development
- Manage the change to become BAU

Duration

Capacity Plan

1 x workstream lead
3 to 4 persons (tbc) members including representation from the Board, PDN and PCF.
Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the roadmap
Unable to agree common approach to the development of the roadmap
Lack of engagement with other workstream groups and Guild committees

Dependencies

Guild 2025 Working Groups
Guild Executive Subcommittee
Guild Finance Committee
Guild Membership
Guild HQ Staff

Critical Success Factors

Increased uptake in Guild event attendance providing opportunities for improved revenue

Date and Revision

24 July 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	F. Business Development – F1.1
Duration	6 Months
Lead	Robert Murray/David Windle

High Impact	
Low Impact	
Easy to implement	Hard to implement

Scope of this project & workstream	<p><u>F1.1 Business Development Strategy</u></p> <p>This project section scope is to <i>develop a business development strategy/procedure to increase membership and review what events attract members to the Guild.</i></p>
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Workstream outcome(s) as required	<p>To develop a strategy for business development and as part of this review in detail how we currently promote the Guild and what new channels could be considered or focused on, covering:</p> <ul style="list-style-type: none"> Recruitment of new corporate and individual members, Visibility of the Guild to Government, industry bodies, large sector companies, potential new How technical white papers and advisory services can promote the Guild What 'promotion channels' are currently used and if any new technology channels should be used Review and assess if social events enhance membership and promote the Guild Review Guild branding – this should include: <ul style="list-style-type: none"> The actual name of the Guild and its short forms The logo The vision The mission statement How these are projected into the existing and potential membership
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Strategic Objective(s)	<p>To define a 5 year Business Development Strategy that will secure the future of the Guild, increase its membership, enhance its influence and support the overall next five year Guild strategy.</p> <p>Specifically, this section will define the revenue streams of most importance and develop a number of focused sales strategies to grow these, including any new revenue lines. All of this must be done in an empathetic way to the Guilds philosophies, overall objectives and principles.</p>
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Benefits	H M L	Measure
<ul style="list-style-type: none"> Clarity for how the Guilds revenue will be secured and grown over the next 5 years 	H	<ul style="list-style-type: none"> Accounting and membership statistics during the next 1,2 and 5 years for operation (growth assumed if strategy is successful)
<ul style="list-style-type: none"> Enhancement of the Guilds brand and perceived value to its members and potential members 	H	<ul style="list-style-type: none"> Surveys of both members and external bodies
<ul style="list-style-type: none"> Increased influence within Government and Industry bodies 	H	<ul style="list-style-type: none"> References from related official organisations

Capacity Plan	Capability Plan
1 x workstream lead 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable	Duration
<ul style="list-style-type: none"> Establish Working Group to develop a Business Development Strategy A comprehensive Business Development Strategy document for the next 5 years. Recommendations for any identified changes to current practices, products and channels to market. Costs for implementing the recommended strategies Joint Ventures with other organisations. 	6 Months

Risks / Issues
Lack of activity from the workstream team leading to delay in finalising the roadmap Unable to agree common approach to the development of the roadmap Lack of engagement with other workstream groups and Guild committees

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee Guild HQ Staff	Establishment of revised Guild vision, company documentation, management structure and headquarters infrastructure and management

Date and Revision
24 July 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	F. Business Development – F1.2
Duration	3 Months
Lead	Robert Murray/David Windle

High Impact	★	
Low Impact		Easy to implement

Scope of this project & workstream	F1.2 Interact with Existing and Potential Members This project section scope is to develop a strategy for Guild interact with members or prospective members in the future – electronic, social media, face to face
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Workstream outcome(s) as required	As a part of the Business Development Strategy, the working group will specifically focus on all aspects of channels for interaction with the membership and potential members. The process to be followed will be to: Define/List all current 'points or channels' of interaction with membership and interested parties For each 'channel' assess: <ul style="list-style-type: none"> the frequency of use, the effectiveness the channel, the reach of the channel (number of potential members impacted), the cost of each channel Channels to be included in the assessment are: <ul style="list-style-type: none"> Email Potential member company visits Meetings 'face to face' Brochures, white papers, event collateral Strategic Advertising Webinars Open days at HQ Member company visits Social media (all Facebook, Twitter, Instagram, Snapchat etc etc) Note: All of the above to be carried out in conjunction with the communications committee.
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Strategic Objective(s)	The objective is to fully understand how the Guild currently interacts with its members (individuals and corporates) and to assess if the effectiveness of this interaction can be improved. The underpinning objective is to increase membership and income.
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Benefits	H M L	Measure
Improved interaction with members and potential members	H	Post strategy implementation: • Membership numbers(Is & Cs)
A true understanding of our market presence and future growth potential	H	• Membership surveys
An ability to define a wider five year strategy for the Guild so as to secure and grow its future.	H	• Attendance at Regional & national meetings • Attendance Guild events • Level of interaction with Govt

High Level Deliverable	Duration
<ul style="list-style-type: none"> The outputs from this section should contribute to the overall Business Development Strategy. The outputs will include: <ul style="list-style-type: none"> Minutes from all related workshops and meetings An analysis of all interaction channels covering the above metrics – to include an effectiveness assessment for each A review and assessment of potential new channels Recommendations for the next five years Consideration to Guild member KPI's – How can we make all participate in delivery. 	Estimated at 3 Months

Capacity Plan	Capability Plan
1 x workstream lead 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues
<ul style="list-style-type: none"> Lack of activity from the workstream team leading to delay in finalising the roadmap Unable to agree common approach to the development of the roadmap Lack of engagement with other workstream groups and Guild committees

Dependencies	Critical Success Factors
<ul style="list-style-type: none"> Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee Guild HQ Staff 	Establishment of revised Guild vision, company documentation, management structure and headquarters infrastructure and management

Date and Revision
24 July 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	F. Business Development – F1.3
Duration	6 Months
Lead	Robert Murray/David Windle

High Impact	★	
Low Impact		
	Easy to implement	Hard to implement

Scope of this project & workstream	F1.3 Marketing Literature This project section scope is to undertake a review and update the Guild marketing literature
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Workstream outcome(s) as required	A working group will specifically review all current marketing literature, the assessment will include: <ul style="list-style-type: none"> Effectiveness of each item of literature in terms of: Impact on current membership Impact on potential members How the literature is distributed (Channels) to members and to industry/government The cost of each form or type of literature and an assessment of its 'value' Identification of any new literature that may be considered advantageous to the Guild Recommendations for what literature the Guild has, how it is used, how costs can be optimised and how it is distributed to have the biggest impact. Note: All of the above working in conjunction with the communications committee
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Strategic Objective(s)	The principal objective is to ensure that all literature supports the future development and growth of the Guild. At a more tactical level, the objectives of this activity are: <ul style="list-style-type: none"> Ensure all literature is fit for purpose (now and future) Ensure that there is a 'literature strategy' that can be followed over the next few years and that this maps to the overall Guild strategy and supports it. Ensure the literature produced is suitable for the prioritised 'channels to market'
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Benefits	H M L	Measure
• An optimised set of literature that is fit for purpose.	H	• Targeted surveys and feedback from members and externals
• Improved and impactful literature at all levels	H	• Growth in memberships numbers and revenues
• Enhancement of the Guilds image	H	• Downloads of available literature on website
• Contribution to expanding Guild membership & a secure future		

Capacity Plan	Capability Plan
1 x workstream lead 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable	Duration
A definitive document that identifies all Guild literature and includes: <ul style="list-style-type: none"> Type, Style and Objective of each item of literature The costs associated with each The reach (no. of members or potential members) An assessment of the impact of each item Identification of those items that are ineffective Recommendations on the future standard Literature set Review Testimonials / statements & recommendations. 	6 Months

Risks / Issues
Lack of activity from the workstream team leading to delay in finalising the roadmap Unable to agree common approach to the development of the roadmap Lack of engagement with other workstream groups and Guild committees

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee Guild HQ Staff	Establishment of revised Guild vision, company documentation, management structure and headquarters infrastructure and management

Date and Revision
24 July 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	F Business Development – F2
Duration	6 months
Lead	Robert Murray/Darren Bartlett

High Impact	★	
Low Impact		Easy to implement

Scope of this project & workstream

F2 Guild Awareness & Visibility
 This project section scope is to review and determine the following:
 How to make the Guild more visible - How to gain greater access and engage with staff in larger companies & organisations. - How can the Guild improve awareness of events within the membership

- Workstream outcome(s) as required**
- Review the list of current & historic members to assist in the development of a target pursuit of larger companies & organisations. A focus will be given to the following sectors & supply chain:
 - Pipeline Operators (onshore & offshore)
 - Energy & Utility (Power operators ie Drax, RWE, Uniper etc, Water Sector)
 - Upstream Operators (IOCs, Independents)
 - Midstream (Gas Terminals)
 - Downstream (Refining, Petrochemical & HC Storage)
 - Hydrogen Economy (Focus on clusters, NW, SWIC, ABZ, Teeside, Humber)
 - EPCs, Engineering Consultancies, Pipeline Manufactures
 - On completion of the target companies & organisations, prioritise the top 5-10 companies in each of the sectors identified above to ensure a focused BD drive including meetings, marketing literature, events, webinars, social media etc.
 - This approach will allow the Guild to not only increase visibility and access to the larger companies & organisations but also grow its footprint in multi sectors, both in mature O&G sectors but also in the Future of Energy such as the Hydrogen Economy and Carbon Capture sectors.
 - Improve awareness of events within membership – review current marketing of events and increase channels to market. Questionnaire to current members to benchmark current awareness of events and improvements that could be made.
 - Chair Hydrogen Economy Conferences via IGEM etc

Strategic Objective(s)

- To increase the visibility of the Guild to the membership and prospective members particularly in larger companies
- Create greater awareness of Guild events....

Benefits	H M L	Measure
Increased visibility and access to larger companies & organisations	H	• Increase membership by XX % by 2021
Increased membership from traditional sectors and new sectors	H	• Increase membership in target sectors and measure yoy - target double digit % growth
Increased graduate, early career membership	H	• Increase participation from graduate, early career workforce
Visibility & Drive Net Zero 2050	H	

High Level Deliverable	Duration
<ul style="list-style-type: none"> Establish a Specialist Working Group to develop a plan to identify the Develop a company and asset register by sector identifying production facilities and pipeline (service, volume, length) for each of the sectors above Hydrogen Economy; although existing assets will be utilised for transferring the H2 & CO2 new infrastructure will be designed and installed over the next 10 years. High level H2 Economy roadmap will be developed for each of the clusters with identification of infrastructure and project drivers Develop Questionnaire & Results Analysis 	6 months

Capacity Plan	Capability Plan
1 x workstream lead 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF Guild membership. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the roadmap
 Unable to agree common approach to the development of the roadmap
 Lack of engagement with other workstream groups and Guild committees

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Membership Guild HQ Staff	Establishment of revised management plan to increase engagement with professionals and technicians/tradesmen

Date and Revision

24 July 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	F Business Development – F3
Duration	30 months
Lead	Robert Murray/John Ineson

High Impact	★	
Low Impact		Easy to implement

Scope of this project & workstream

F3 Market Coverage of the Guild

This project section scope is to review expanding the scope of the coverage of the Guild from pipeline technology to other related areas such as automated reasoning robotics, safety, health, mental health & wellbeing, environment, sustainability, asset management, pipeline support industries – administration, legal, commercial etc

In addition review the available market to the Guild and the different sectors involved

This would form part of the development of a BD strategy

Workstream outcome(s) as required

- Define market sectors and potential Guild members
- Define Service offerings to Guild members
- Plan and agree a strategic approach to 1 & 2 above, which would include defining and categorising the market sectors into: -
 - Existing Members
 - Past Members
 - Potential Members
- Categorise service offerings into: -
 - Existing service offering
 - New service offering
 - Unique Service offering
- Review service offering wording / offer – Is it a benefit
- Consider the introduction of Patrons to provide friendly support

Benefits

- Clarity and the market available to the Guild and the potential value of that market
- Clarity on target potential members
- Clarity on existing and potential service offerings.
- USP, what makes us different

H M L

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Measure

- KPI for growth, retention, return and new
- KPI for service usage, who uses what service and how often

Strategic Objective(s)

Update the current Guild structure and management to provide a framework to deliver the Guild's objectives for the next 5 years ..

Capacity Plan

1 x workstream lead
3 to 4 persons (tbc) members including representation from the Board, PDN and PCF.
Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable

- Establish a Specialist Working Group to develop a plan to identify the various market sectors that can be targeted by the Guild
- Issue existing membership list
- Issue existing service offering list
- Issue past members list
- Define action plan for delivery, who and how
- Establish headquarters involvement, how much
- Establish annual review process
- Provide a proposal for Board Approval
- Prepare and Launch a new process for engagement
- Manage the change to become BAU

Duration

1 month
1 month
1 month
1 month
6 months
2 months
12 months
3 months
1 month
1 month

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the roadmap
Unable to agree common approach to the development of the roadmap
Lack of engagement with other workstream groups and Guild committees

Dependencies

Guild 2025 Working Groups
Guild Executive Subcommittee
Guild Membership
Guild HQ Staff

Critical Success Factors

Establishment of revised management plan to increase engagement with professionals and technicians/tradesmen

Date and Revision

24 July 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream F Business Development – F4

Duration 9 months

Lead Robert Murray/Dan Jefferson/Norman Howell

High Impact



Low Impact

Easy to implement

Hard to implement

Scope of this project & workstream

F4 Engagement with Professionals and Technicians/Tradespeople

This project section scope is to develop a process to engage with both professionals and technicians/trades people

Workstream outcome(s) as required

- Formalise a plan to identify and understand the requirements of the various groups
- Gap analysis of existing Guild offers and the needs of the various groups
- Evaluate if there is value in developing the Guild benefits to attract wider participation within the Guild
- Develop a proposal for consideration by the Guild Board
- On approval prepare a plan for delivery

Benefits

- Additional benefit for the membership
- Increased knowledge pool
- Increased opportunity for Guild engagement
- Increasing the outreach of the Guild
- Increased opportunity for individual development

H M L

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Measure

- Providing additional value
- Greater engagement
- Increasing awareness of the Guild

Strategic Objective(s)

To provide a platform for developing engagement with the wider pipeline community....

High Level Deliverable

- Establish a Specialist Working Group to develop a plan to identify the various groups and undertake a gap analysis
- Provide a proposal for Board Approval
- Prepare and Launch a new process for engagement
- Manage the change to become BAU

Duration

6 to 9 months

Capacity Plan

1 x workstream lead
3 to 4 persons (tbc) members including representation from the Board, PDN and PCF.
Support from Guild HQ,

Capability Plan

Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues

Lack of activity from the workstream team leading to delay in finalising the roadmap
Unable to agree common approach to the development of the roadmap
Lack of engagement with other workstream groups and Guild committees

Dependencies

Guild 2025 Working Groups
Guild Executive Subcommittee
Guild Membership
Guild HQ Staff

Critical Success Factors

Establishment of revised management plan to increase engagement with professionals and technicians/tradesmen

Date and Revision

24 July 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	F. Business Development – F5
Duration	9 Months
Lead	Robert Murray/Chris Bielby

High Impact	★	
Low Impact		Easy to implement

Scope of this project & workstream	F5 Links to Armed Forces and Prison Service The Aims of this project section scope are:
	<ul style="list-style-type: none"> Purpose : Consider creating links with the armed forces, prison services etc to act as a conduit for entry for personnel to the pipeline industry End Product : Production of a relevant contact list across the armed forces and prison services Success Criteria : The contact list will act as conduit to promote PIG membership

Workstream outcome(s) as required	<ul style="list-style-type: none"> Gather Information <ul style="list-style-type: none"> Known – Engage with existing contacts such as Sir John Parker, Jon Butterworth and Paul Sheridan (ex-Royal Marines) who have all been instrumental in bringing armed forces & ex-offenders personnel into the Energy Industry Needed – Liaise with known and other contacts to produce a list of relevant contacts across the armed forces and prison services Prepare a plan for engagement with the Armed Forces and Prison Service with details for implementation
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Benefits	H M L	Measure
<ul style="list-style-type: none"> Provide additional membership benefit Improved interaction with members and potential members Enhancement of the Guilds image Contribution to expanding Guild membership & a secure future 	H H H H	<ul style="list-style-type: none"> Interaction with targeted groups Growth in memberships numbers and revenues

Strategic Objective(s)	To prepare a plan for engagement with Armed Forces and Prison Service to develop opportunities for entry into the pipeline industry
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Capacity Plan	Capability Plan
1 x workstream lead 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

High Level Deliverable	Duration
<ul style="list-style-type: none"> Set up a meetings with known contacts o obtain the relevant contacts and prepare the contact listings Establish a Specialist Working Group to develop a plan to prepare an engagement plan Provide a proposal for Board Approval Prepare and Launch a new process for engagement Manage the change to become BAU 	1 Month 8 Months

Risks / Issues
<ul style="list-style-type: none"> Lack of activity from the workstream team leading to delay in finalising the roadmap Unable to agree common approach to the development of the roadmap Lack of engagement with other workstream groups and Guild committees

Dependencies	Critical Success Factors
<ul style="list-style-type: none"> Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee Guild HQ Staff 	<ul style="list-style-type: none"> Establishment of revised Guild vision, company documentation, management structure and headquarters infrastructure and management

Date and Revision
24 July 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	F. Business Development – F6
Duration	6 Months
Lead	Robert Murray/Dan Jefferson/Norman Howell

High Impact	
Low Impact	
	Easy to implement
	Hard to implement

Scope of this project & workstream	<p><u>F6 Review of Guild Event Advertising.</u></p> <p>This project section scope is to review advertising and selling Guild events to improve revenue streams</p>
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Workstream outcome(s) as required	<ul style="list-style-type: none"> Understand current approach and other similar industry bodies processes Undertake a gap analysis to determine the size of the opportunity for improvement Prepare a proposal for consideration by the Guild Board On approval develop and implement plan Introduce new process as BAU
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Benefits	H M L	Measure
<ul style="list-style-type: none"> Better visibility of events and event programme Greater sharing of knowledge across the membership Increased footfall for presenters Opportunity to increase Guild revenue 	H	<ul style="list-style-type: none"> Higher attendance at Guild events Income from Guild events
	H	
	M	

Strategic Objective(s)	...Reviewing Guild Event Advertising.
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High Level Deliverable	Duration
<ul style="list-style-type: none"> Establish a Specialist Working Group to develop a plan on event advertising Provide a proposal for Board Approval Prepare and Launch a new process for event advertising Manage the change to become BAU 	6 Months

Capacity Plan	Capability Plan
1 x workstream lead 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues
Lack of activity from the workstream team leading to delay in finalising the roadmap Unable to agree common approach to the development of the roadmap Lack of engagement with other workstream groups and Guild committees

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee Guild Membership Guild HQ Staff	Increased uptake in Guild event attendance providing opportunities for improved revenue

Date and Revision
24 July 2020 Revision 3



GUILD 2025 STRATEGY ROADMAP

Workstream	F. Business Development – F7
Duration	6 Months
Lead	Robert Murray/Chris Bielby

High Impact	
Low Impact	
Easy to implement	Hard to implement

Scope of this project & workstream	<p><u>F7 Engagement with Government Departments</u></p> <p>The Aims of this project section scope are:</p> <ul style="list-style-type: none"> • Purpose: Develop a strategy for engaging with Government Departments such as Department of Innovation, Universities & Skills & the Department of Business, Enterprise & Regulatory Reform • End product: Produce a list of Ministers, MP's and senior officials in Government Departments • Success Criteria: The key stakeholder list (above) will actively promote PIG and develop membership leads. At the very least the contact list will be able to open the appropriate doors for Chris Bielby
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Workstream outcome(s) as required	<ul style="list-style-type: none"> • Gather Information <ul style="list-style-type: none"> • Known – Engage with existing contacts particularly where meaningful relationships exist such as MP's, Lords and senior officials in Government departments • Needed – Do we approach the contacts with the existing PIG vision, strategy and literature or do we wait until new versions are available • Ensure that appropriate literature is available to make contact I will make contact with officials and follow AIDA to promote PIG – awareness, interest, desire and action. • Prepare a plan for engagement with the government departments and politicians with details for implementation
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Strategic Objective(s)	To prepare a plan for engagement with Government Departments and Politicians
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Benefits	H M L	Measure
• Enhance the visibility of the Guild	H	• Increased influence and interaction with Government
• Enhancement of the Guilds brand and perceived value to its members and potential members	H	
• Increased influence within Government and Industry bodies	H	

High Level Deliverable	Duration
<ul style="list-style-type: none"> • Produce a listing of: <ul style="list-style-type: none"> • Ministers, MP's, and senior members of the Government Agencies. • Senior Government Officials in BEIS, Department for Business, Enterprise and Regulatory Reform, HSE, and Ofgem • Establish a Specialist Working Group to develop a plan to prepare an engagement plan • Provide a proposal for Board Approval • Prepare and Launch a new process for engagement • Manage the change to become BAU 	6 Months

Capacity Plan	Capability Plan
1 x workstream lead 3 to 4 persons (tbc) members including representation from the Board, PDN and PCF. Support from Guild HQ,	Ensure all involved want to be involved and have an interest in the end result. Have a schedule of regular meetings and regular updates and short term action plan required to keep interest.

Risks / Issues
Lack of activity from the workstream team leading to delay in finalising the roadmap Unable to agree common approach to the development of the roadmap Lack of engagement with other workstream groups and Guild committees

Dependencies	Critical Success Factors
Guild 2025 Working Groups Guild Executive Subcommittee Guild Finance Committee Guild Membership Guild HQ Staff	Increased uptake in Guild event attendance providing opportunities for improved revenue

Date and Revision
24 July 2020 Revision 3