

## A Year in the Life of Bob Davis: Taking Advantage of an Opportunity

August 15

Revisions to a stack of technical specifications were due tomorrow. Bob Davis mulled over staying late to finish up his comments or heading on home to catch the last half of his son's Pee-Wee League football game. Still, somewhere in the back of his mind, something else was nagging him. At 32, Davis was an up and coming engineer for LockMar Corporation, a large, US-based manufacturing company that provided specialized components to the nuclear reactor industry. LockMar was being considered as a supplier for the new reactors in China, and Bob had his eye on becoming the lead technical engineer when the China business materialized.

But today, it was already 4:30, and he wasn't ready for the concentration that a thorough review of technical specs required. He decided to check his email Inbox for emergencies, and then if all was calm, he could head off to see the future of college football make his first tackles.

Later that night after his son Jack was tucked in, Bob and his wife Jan piled up in front of the television. Bob flipped on his laptop and started his usual late night review of emails and Facebook activity. When he saw ASME in his From box, he suddenly remembered what his nagging inner voice had been trying to tell him.

Bob Davis was in the home stretch of his commitment to his local ASME Section. He had first served as treasurer, and then last year, as the Vice-Chair. His term as Chair of the Knoxville Section in the Mountain District was underway and it was time to get started. In fact, he realized that he was already behind if he wanted to make some changes to how the Section had operated for many years.

Bob had taken care of the Section's officer list. He had convinced John Allen, one of his buddies from the office, to be the treasurer, and Peter Johnson, an engineer from a local government agency, moved up to Vice Chair from last year's Treasurer slot.

However, they still had some work to do to clean up the previous year's after-activities reports and get their Merit Funding document submitted. Also, it would soon be time for the September section meeting, and the year's schedule of events and speakers wasn't set. Bob decided he probably needed a meeting with his other officers. He jumped into action and sent his team an email:

*Hello John and Peter:*

*It's time we got started on planning out the ASME section activities for the upcoming year. Peter, have you set the date for the September meeting and arranged for a speaker? I know we've been having dinner meetings, but there's been lots of complaints about the cost and the*

*problems of being away from home at night. With everyone's travel schedules and overtime, I think it's a valid point.*

*Anyway, how about the three of us meet later this week. Since John and I work in the same building, I can reserve a conference room and Peter, you'll be the only one having to travel.*

*Let me know which day and what time and we'll kick things off.*

With that detail off his list, Bob checked out *Monster.com* for mechanical engineering jobs and headed off to bed.

August 17: Executive Committee Meeting

Luck was on his side, and the three Section officers were all available to meet two days later.

**Bob:** Hello John. Peter, I haven't seen you since last spring when we talked about how we would improve our section when we were in charge. It seems to me that our Section keeps on doing the same things every year. We have monthly meetings and a dinner with all the other engineering societies during Engineers Week. I want us to fire things up and get our Section moving. There's got to be some fun things we could do that would be beneficial.

Also, we need to apply for our annual funding. I have the Merit-Based Funding form that we must submit by October 1. Peter, as last year's treasurer, do you know if last year's Annual Financial Report and the up-coming year's Operations Budget Report are ready to submit?

I'm thinking we have even bigger problems that we have to deal with first. I've been looking at this form, and I don't think our section met many of the criteria that it takes to get merit funding. I guess I wasn't paying too much attention to these details. Maybe we can't do anything about activities that didn't happen last year in getting our next funding. However, we can make sure we get all our points for next year and that we get credit for all that we can.

**Peter:** Hey Bob, it sounds to me like you are into firing up the section. I am only planning on arranging and getting speakers for our meetings. I have a couple of small kids and I coach their soccer team. Between the kids and work, I'm not interested in much more. In fact, I was hoping you would help me out with finding some speakers. I figured that if I could get through this year as Vice Chair with all the speaker hassles, I could coast next year as Chair. It seems to me that the Chair usually just does introductions of the speakers, signs the

annual report, and gets a line for the old resume for having been ASME Section Chair.

**John:** So, I guess I didn't understand... Are you thinking that next year I become the Vice Chair and then in the following year, I become the Chair? That sounds like a pretty big commitment! I thought I'd just be coming to some meetings and handling the money.

**Bob:** Hey guys – don't bail out on me. I don't know how to make this happen either, but we have a lot of members – surely there are plenty of mechanical engineers that would get involved if we did cool things and they knew about it.

We've signed up for these offices. I guess we have no choice but to do it.

Later that night, Bob reflected over the meeting with his executive committee. It seemed to him that they were in for much more than they had bargained for. At least they had decided on the meeting dates for the year and potential speakers. Bob wasn't sure Peter would actually cold-call some of the suggestions, but he decided to give him a month or so before figuring out an alternative. He was pretty sure that the September and October meetings would happen – between the three officers, they had identified two vendors that were always willing to do a technical talk in order to get in front of the nuclear industry engineers. Maybe these weren't the cool ideas he had hoped for, but it got two more things checked off the list.

#### *September 15: First ASME meeting of the year*

Bob, Peter and John were appropriately anxious about the section's first meeting of the year. Peter had gotten flyers out at the last minute that let members know about the meeting. They were not sure who would show up and how their speaker would work out. They were excited to see the usual suspects show up – their colleagues from work and a few guys that had retired and always came back to catch up on the gossip from the office.

Bob was relieved – he had enough folks to fill up the room and the speaker was entertaining. One meeting down and seven to go. He decided to worry about the merit funding application in a few days.

#### *September 16: A Phone Call*

**Charlie:** Hello Bob. This is Charlie Brown. We briefly met last night at the ASME meeting. How is going for you to be the Section Chair this year? I was a section chair many years ago when I worked for Westinghouse in Pennsylvania. I'm here in Knoxville

working as a sub-contractor. How about we meet? I've got some time on my hands and would like to help out.

Bob recalled meeting the older man at the meeting the night before. He didn't know much about Charlie, but he figured he had nothing to lose to meet and see what was being offered.

#### *September 18 Meeting with Charlie Brown*

Bob was starting to worry. Frankly he was overloaded. Peter wasn't promising that he could get any more speakers and the merit funding application was due at ASME headquarters. On top of his ASME commitments, it looked like the China projects were about to be turned on and he had more than enough to think about from work alone.

He was much too busy to meet with Charlie, but he had promised and wasn't one to not honor commitments.

"Hello Bob. Thanks for taking the time to meet with me," the older engineer greeted Bob.

"Hey Charlie, it's my pleasure. What's on your mind?" Bob said in an effort to get down to business so he could return to his own busy schedule.

Charlie realized that the younger man was gracious, but was also pressed for time and seemed distracted. Charlie got to the point right away. "Bob, when I watch you, I see myself 25 years ago. Smart, talented and task-focused. After many years in management and then actually running our company, I'd like the opportunity to really run a section – to run it like a business instead of an engineering project. I relocate about every year, so I'm not in a position to be the Chair again, but how about I help you out? I think ASME can be the perfect forum for you to get the business skills it takes to move into thinking like a strategic leader rather than the guy who can get everything done."

This whole conversation took Bob by surprise. What did this stranger mean about really running a section like a business? And, hadn't he been started along the whole path of ASME offices by his LockMar Division Head? It seemed to Bob that perhaps Charlie didn't understand his abilities and successes.

Charlie sensed that Bob wasn't following along. "Hey Bob, here's what I'm talking about. I'd like for you to ask yourself some simple questions. Are you spending your ASME time understanding your section's challenges and planning ways to meet those challenges? Or, are you thinking about all the problems and wondering what to do to fix them? Do you have an excited team of volunteers pulling off events while you are finding ways to facilitate their projects? Or are you overwhelmed by all your commitments? Moving from manager to leader can be

quite a shift, especially when you have had lots of success getting things done.”

Bob still looked dazed, and somewhat frustrated. Charlie said, “Bob, how about we set up a meeting one evening this week and I can talk about the details of how to strategically lead the section instead of getting caught up in the logistics of pulling off another year in the Section. I’ve been doing some research on what seems to get sections re-invigorated and we can translate that into something that works for you.”

Bob wasn’t sure he trusted his new friend, but then again, what did he have to lose?

### *2 days later in Bob’s Living Room*

Charlie had been busy. Bob didn’t know it, but several years earlier, Charlie had moved up the ranks of ASME’s leader structure and listened to many volunteer leaders talk of what they would have done differently in hindsight. He had often thought about what his engineering education and career had meant to his success, and intended to give back.

**Charlie:** Bob – Thanks for having me over to your house. Your involvement with ASME provides you a great opportunity to learn things that will help you shine in your career – but you have to take advantage of the opportunity during the time you are in office. Let me put this in perspective: What do you want your legacy to be with your local section at the conclusion of your year as Chair?

**Bob:** Hey, wait a minute... My Legacy? I’m not planning on dying from this...Or is there something else I should know? ☺

**Charlie:** Bob, I’m not talking about what’s written on your gravestone or said in your eulogy. But you leave a legacy everywhere you go and with everything you do. After your year as Chair, what do you want them to remember? What permanent, conscious improvements do you want to leave behind? Without planning, you’ll leave things a little worse than you got them – organizations only get better with a continuous push.

It’s already September and three months of your year are already gone. If you don’t mind, can I share a plan with you? Basically, it’s what I’d do if I could do your job with the benefit of experience.

**Bob:** I’m pretty good at getting things done. I also can come up with a new twist on the stuff we’ve always done. My biggest problem is that I need NEW ideas. I don’t think I’ll have much success taking

what we always have done and trying to do it better.

**Charlie:** Exactly. Here’s what I’m thinking. I’d like to see you take on three objectives this year.

The first one is to figure out all the things already on the list that have to be accomplished and delegate them to your other officers or other members. Getting rid of the details will free you up to think about the bigger problems. You’ll find that you might get some additional people engaged with the section if you make a personal appeal for help, and then depend on them to do it.

The second objective for you is to pull off a special event. This project will be tangible, and if it is successful, it can leave the section a great foundation for continuing it in the future. The third objective is for you to start the ball rolling with regard to recruiting new members and volunteers.

**Bob:** We already do plenty of stuff with our section meetings, newsletters, and plant tours. The problem is that people won’t come.

**Charlie:** I’m not suggesting you give any of that up. What I’m suggesting is that you do what businesses do to be successful - identify your *target market* and then give them what they want. It looks like your section suffers the same way as many others – retirees and a core group always show up. What ever their need is – your section is doing a great job meeting it. Your challenge now is to figure out what a different part of your market values. If you can get this, then new grads and those currently not engaged may decide that their ASME section is worth the time and trouble.

This is a common problem across ASME, and you can benefit from what some other sections have tried. I’ve been talking with the folks at Headquarters and there have been sections that are putting on a one-day program called an Early Career Forum. It’s a day of seminars, training and networking for engineers with less than 5 years work experience. This activity lets you work on two objectives at once – a special event that is of value, and the opportunity to personally meet with the very people you’d like to engage in the section.

Putting on an ECF will be a great special activity for your section to sponsor. However, January and February are the best times to find people willing to devote a Saturday, so you’ve got to get started right away on this...

## Part II Recruiting and Engaging More Members

November 10

Bob wasn't sure how it had happened, but Charlie had turned out to be a great friend. He had appeared just at the right time. Bob had even found himself talking with the older engineer about more things than just being the section Chair.

The Early Career Forum was about to be a real event. Granted, he had pushed one of his suppliers to offer up a young engineer to head things up, but the young lady actually seemed excited to take on the activity. Who would have guessed that all he needed to do was ask?

Charlie had insisted that Bob totally hand-off the event to Amy. "Bob, your role is to schedule a meeting with Amy every 10 days or so to give her an opportunity to tell you what's working and what's not. Then you ask her what she needs for you to do to help. If it's something that anyone else can do, then you help her find that person. If it's something that needs your official capacity, then jump in, do it, and back out."

Charlie had also helped Bob get John and Peter working their roles. It seemed odd to spend his time talking and listening rather than doing, but the two officers seemed to be responding to the simple goals that Charlie had helped him lay out. Things were getting done – one step after another. Neither of his two officers had the inclination to go the extra mile, but with clear goals, Bob was getting them to fulfill their obligation.

Charlie had given the younger man a choice. "You can run the section like it is a finite project where you are successful by ticking off the milestones of a few newsletters, a few section meetings, and a plant trip. Or, you can run it like it is your very own business where it's important that the annual milestones are met, but it's also important that you have the future planned so that you can be around in five years and ten years."

Bob was starting to understand that his section was his very own small business. He had a staff, customers, a budget, and a very critical need to understand his market so that he could plan for the future. Bob understood that his Vice Chair and Treasurer had specific roles and he had recruited some other members to take on additional special tasks. Amy was Chair of the ECF event, Tyler Baskin had agreed to head up activities associated with recruiting existing members to become more active, and Jennifer Lofton was the committee chair for engaging young engineers and students.

However, today was a big event. He had arranged a meeting with his officers and three committee chairs to talk about firing up the Section. Charlie was sitting in as an advisor and had agreed to help them think about their *target market*. Charlie had been coaching Bob about strategic thinking and focusing on his target market. The

target market thinking made sense, but was easier said than done. He wanted to gain support from all those present to take on the task of planning their future strategy. His team would be the people who would commit to spending time over multiple years to change the course of the section.

Bob had experienced a change in thinking. He had previously seen his ASME section and it's officer progression as simply executing what the people in front of him had done. As treasurer and Vice Chair, he had done what the guys in front of him had done. That basic execution was what he had in mind for his year as Chair of the Section. Now, Charlie was helping him to understand that there was another side to running what the older man called a viable section. Being viable had little to do with logistics and everything to do with leadership and strategy. Viability took into account what happened in the future. It considered what happened to everyone in the section next year and then in five and ten years. This was new ground for Bob. His success at home and at work had come from his ability to get things done in the here and now. With his ability to work the numbers, break a project into tasks, and push the schedule, Bob was the Go-To guy that could convince others to toe the line. Now he was being asked to sell a best guess.

Bob and Charlie had spent two evenings pinpointing their target market. The broad category was all of the members in their district. Bob had wanted to start developing ideas to get anybody he could engaged in the section, but Charlie helped him understand that going after the entire district would be confusing apples and oranges because the membership had different needs depending on their stage of life. "The reason the retirees come to your section meetings is all about a setting to visit with their old friends," reminded Charlie. "To change the mix of your active members, you may need to break them down into different markets. Then you can specifically target activities to each one."

So, Bob was prepared to present his target market diagrams to the group, along with some research on what the different age groups seemed to want. Then Charlie was going to lead them through an analysis of the market. Their strategy would come from that analysis.