



AOE PORTFOLIO

STRATEGIC PLANNING



ABOUT AOE



With roots dating back to the early 1990s, Advancing Organizational Excellence (AOE) is an association management, event planning and marketing consulting firm with unique expertise in the design and construction industry.

Our 80-plus team members have experience in all aspects of business in this industry, ranging from strategic planning and operations to membership, marketing, certification, training, code advocacy and adoption and more.

AOE is committed to providing best-in-class services and putting our profits right back into the industries we serve. When you hire AOE, you invest in yourself, and you invest in your industry.

Organizations must have clear direction and actionable plans to achieve their goals and adapt to changing industry circumstances. At AOE, we specialize in guiding organizations through the strategic planning process, helping them define their mission, vision and goals, while creating actionable steps to achieve measurable results. Our experience, coupled with our proven approach, ensures that every plan is tailored to the unique needs of our clients, providing clarity, focus and a roadmap for success.

This portfolio highlights examples of our work in strategic planning, showcasing how we've partnered with clients to address challenges, identify opportunities and create plans that drive results. From conducting stakeholder analysis to facilitating strategy meetings, AOE is committed to helping organizations overcome challenges, seize opportunities and achieve their vision.



AOE's strategic planning services are designed to help organizations define their direction, set priorities and allocate resources effectively. Our process includes background research, stakeholder engagement and the development of comprehensive plans that align with long-term goals. We also emphasize the importance of regular plan reviews and adjustments to ensure continued relevance and success. To learn more about our strategic planning process, read our blog [Strategic Planning 101](#) and check out our [other blog article resources here](#).

CLIENTS FEATURED IN THIS PORTFOLIO

- [American Concrete Pavement Association Pennsylvania Chapter \(ACPA/PA\)](#)
- [American Concrete Pumping Association \(ACPA\)](#)
- [Concrete Foundations Association \(CFA\)](#)
- [Iowa Concrete Paving Association \(ICPA\)](#)
- [Iowa Ready Mixed Concrete Association \(IRMCA\)](#)
- [Minnesota Concrete Council \(MCC\)](#)
- [NEU: An ACI Center of Excellence for Carbon Neutral Concrete](#)
- [Post-Tensioning Institute \(PTI\)](#)



American Concrete Pavement Association Pennsylvania Chapter



THE CLIENT

The American Concrete Pavement Association Pennsylvania Chapter (ACPA/PA) is committed to promoting resilient, cost-effective and locally sourced concrete pavement solutions across the Commonwealth. The organization plays a vital role in advocating for infrastructure investments, providing technical services and fostering collaboration among industry stakeholders.

THE CHALLENGE

- Limited influence on state infrastructure policies and funding allocations for concrete pavements.
- A need to grow membership and diversify revenue streams to ensure financial sustainability.
- Operational continuity and leadership succession planning to position the organization for long-term success.

THE SOLUTION

AOE partnered with ACPA/PA to develop and finalize a comprehensive three-year strategic plan (2025–2028) that addressed these challenges and positioned the organization for growth and resilience. The plan was approved by the Board in August 2025 and focuses on three primary goals:

1. **Grow the work:** Positively influence infrastructure investments and concrete pavement policies in Pennsylvania through legislative and advocacy efforts.
2. **Grow membership and revenue:** Enhance the value proposition, foster industry collaboration and diversify revenue streams.
3. **Plan for the future:** Ensure effective operations, leadership continuity and an ongoing focus on market growth for concrete paving.

THE RESULTS

- A clear roadmap for membership growth, including a target to increase contractor members by 50% by 2028.
- Enhanced advocacy efforts, including the development of key messaging and legislative priorities to influence state infrastructure policies.
- A detailed succession plan to ensure leadership continuity and operational resilience.
- Increased visibility and influence within the industry via targeted marketing and outreach initiatives.

KEY TAKEAWAYS

- Advocacy efforts must be supported by clear messaging and collaboration with industry stakeholders.
- A well-defined membership value proposition is critical for attracting and retaining members.
- Succession planning and operational documentation are essential for long-term organizational success.



American Concrete Pumping Association



**AMERICAN CONCRETE
PUMPING ASSOCIATION**

THE CLIENT

The American Concrete Pumping Association (ACPA) was founded in 1974 with the objectives to promote concrete pumping as the choice method of placing concrete and to encourage and educate the concrete pumping industry on safe concrete pumping procedures. The ACPA Operator Certification Program is the only industry-recognized certification program for testing concrete pumping practices. Members of ACPA include owners of concrete pumps, manufacturers of concrete pumps and distributors of concrete pumps and accessories.

THE CHALLENGE

Although succession planning is typically thought of as a strategy for selecting an heir apparent, AOE believes strongly in the development of roadmaps for employee departures, as well as looking at the process as a means of talent development. To this end, the Board of ACPA was interested in having a succession plan outlined in case of the unexpected departure of their Executive Director.

THE SOLUTION

AOE led several planning sessions with governance and the current staff, including the Executive Director, to identify:

- Processes and standard operating procedures so they could be codified and recorded. This also included development of a list of accounts and passwords, as well as contact information for various consultants and other stakeholders.
- Identification of all stakeholder audiences and what is important to them.
- Review of current employee development plans, ensuring there is a link between succession planning and talent growth.

After these planning sessions, AOE developed an action plan that details key timelines and persons responsible for activities during the transition period should the Executive Director depart, to include activities for the first 24 hours, first week, first few months and during the recruitment process of a replacement.

The plan details processes, people responsible for various activities and their contact information, timelines, passwords and key messages.



American Concrete Pumping Association

THE RESULTS

- The ACPA succession plan ensures the seamless continuity of the Association operations in the event of the unexpected departure, incapacitation or removal of its Executive Director or other key leadership. Key scenarios addressed by the plan include sudden departures due to health reasons, resignations or other emergencies. The plan's primary aim is to minimize disruptions, maintain operational stability and uphold ACPA's mission to promote the concrete pumping industry through leadership, education and advocacy.
- This plan extends beyond leadership roles to include other critical positions within the organization. This comprehensive approach ensures that ACPA is fully prepared for workforce changes while maintaining continuity across all operations.
- The plan also details suggested key messages and drafts of emails and other communications to go to the board, membership, industry at-large and other stakeholders.



Concrete Foundations Association



THE CLIENT

The mission of the Concrete Foundations Association (CFA) is to support the cast-in-place contractor as the voice and recognized authority for the residential concrete industry. CFA is committed to strengthening its role as an industry leader by uniting its contractor membership, associates and other stakeholders to advance excellence in concrete construction. By scaling membership, enhancing engagement and identifying innovative revenue streams, CFA will solidify its influence and mission alignment.

THE CHALLENGE

AOE took over as the association management company for CFA in January 2025. At that time, the organization was operating with an action plan that had more than 100 tactics, as well as a variety of task forces. What was lacking was a structured plan that codified these tactics into strategic objectives and provided priority and a roadmap for activity.

It was key that the action plan included a thorough assessment since we were transitioning staff and management to AOE, as well as providing for an evaluation of all processes and tactics. While patience is key during a transition, we recognized the importance of being laser-focused on meeting key objectives outlined by the Board to ensure long-term success for the Association.

THE SOLUTION

AOE led CFA staff and governance through a multi-staged strategic planning process that included a deep dive into what the organization was currently offering to members and the industry, as well as discussions related to the vision for the future. Key tactics included:

- **Time and activity analysis:** AOE implemented a process to see where staff and consultant time was being spent, allowing for the development of metrics related to key objectives and areas of focus.
- **Member engagement surveys:** A thorough membership survey occurred, enabling the AOE team to gain valuable insight related to member perceptions and industry need.
- **Facilitation and engagement:** AOE led an in-person session with the Board and leadership to refine CFA's mission, vision, values, goals and tactics.
- **Plan development and implementation:** The team then developed a comprehensive strategic plan with goals, objectives, tactics and measurable targets, formatted into internal and external communication tools, including a PowerPoint presentation and simplified messaging for members and external stakeholders.



Concrete Foundations Association

THE RESULTS

- The resulting strategic action plan outlines the **three key areas** of suggested focus for CFA: growth, engagement and resource.
- The action plan also identified key areas for exploration—questions that governance and staff seek to better understand during the next year. For example, one area of focus that was identified as needing further data was a better understanding of the technical role CFA plays in the industry and how central this is to the mission of the organization in the future.
- A membership engagement plan was developed as a result of this process. The plan includes recruitment, retention, onboarding and a variety of engagement activities.
- A marketing plan was developed in response to the key messages identified in the action plan.



Iowa Ready Mixed Concrete Association and Iowa Concrete Pavement Association (Iowa Concrete)



THE CLIENT

Iowa is known in the industry as “The Concrete State.” As the state trade association, Iowa Concrete encompasses both the Iowa Ready Mixed Concrete Association (IRMCA) and the Iowa Concrete Paving Association (ICPA). These organizations are dedicated to advancing the concrete industry in Iowa. Through advocacy, education, technical expertise and strategic partnerships, these organizations support their members in advocating and promoting resilient, efficient and environmentally responsible concrete solutions. With a reputation as a trusted resource, each organization’s Board of Directors sought to address industry challenges and position itself for long-term success.

THE CHALLENGE

While both IRMCA and ICPA have unique strategic needs, many themes overlapped including:

- **Industry consolidation:** Membership structure and financial sustainability have been impacted by consolidation within the industry.
- **Membership engagement:** A need to highlight the value of membership, increase engagement and create accessible engagement points for members.
- **Workforce development:** Addressing workforce shortages, including a lack of younger leaders and skilled labor, while nurturing future industry professionals.
- **Technical leadership:** Maintaining collective reputation as a trusted technical resource while adapting to new materials, technologies and evolving industry needs.
- **Advocacy and market growth:** Expanding advocacy efforts to promote concrete as the material of choice and increasing market share in competitive segments.

THE SOLUTION

AOE partnered with the Iowa Concrete to develop comprehensive five-year strategic plans for both IRMCA and ICPA. These plans were designed to address shared challenges while tailoring solutions to the unique needs of each association. Key activities conducted with each Board included:

- **Background research:** Conducted interviews, surveys and SWOT analyses to identify key challenges and opportunities. Insights highlighted the need for targeted educational resources, enhanced member engagement and financial sustainability strategies.
- **Pre-report development:** Prepared detailed pre-meeting reports summarizing survey results, audience background, SWOT analyses and key findings to guide in-person discussions.
- **Facilitation:** Led in-person strategy meetings with leadership and stakeholders to align on goals, objectives and tactics.
- **Plan development:** Created strategic plans with clear goals, objectives and actionable tactics, formatted into PowerPoint presentations and supported by high-level video summaries for leadership.



Iowa Ready Mixed Concrete Association and Iowa Concrete Pavement Association (Iowa Concrete)

KEY STRATEGIC GOALS

Each organization had its own set of tailored goals, objectives and strategies that aligned with their respective events and committee work. While we aren't sharing the full plans created, an overview of the goals outlined are as follows. Developed goals were then broken down into four or five objectives with supporting actionable tactics/strategies to guide work toward these goals over the next five years. Timelines, metrics and people responsible were assigned for all tactics.

1. Protect IRMCA's reputation as a trusted technical resource
2. Assist members in promoting concrete use
3. Ensure long-term financial sustainability
4. Enhance membership value and engagement

THE RESULTS

- Increased member satisfaction through targeted engagement initiatives and enhanced resources.
- Strengthened financial sustainability with a clear plan for future facility acquisition and member dues structure.
- Improved visibility and influence within the industry through reinforced advocacy and promotional efforts.
- Created plans to launch initiatives that address workforce development challenges, including partnerships with trade schools and a Future Leaders program.



Minnesota Concrete Council



THE CLIENT

The Minnesota Concrete Council (MCC) is a member-led organization dedicated to enhancing the quality, use and perception of cast-in-place concrete in Minnesota. MCC connects contractors, engineers, suppliers, architects, educators and public agencies through education, technical resources and advocacy. Its mission is to promote technical excellence while encouraging concrete as the preferred material for sustainable and resilient infrastructure.

THE CHALLENGE

MCC realized that to stay relevant and keep providing value to its diverse members, it required a clear strategic plan. Feedback from surveys and interviews pointed out several urgent issues.

- **Member needs:** High demand for technical education (93%), networking opportunities (74%) and industry promotion (54%).
- **Generational engagement:** Members emphasized the need to improve how we engage younger professionals and students, utilizing social media, field-based programs and collaborations with universities.
- **Industry positioning:** Concerns about increasing competition from alternative materials and the need for MCC to enhance promotion of concrete.
- **Organizational sustainability:** Relying on a small group of dedicated volunteers raises concerns about long-term capacity and succession planning.

THE SOLUTION

AOE guided MCC through a structured strategic planning process:

- **Background research:** Conducted member and stakeholder surveys with strong response rates from engineers, contractors, suppliers and educators, along with leadership interviews. Identified member priorities included education, networking, industry promotion and generational engagement.
- **Pre-report development:** Presented a summary of survey results, SWOT analysis and emerging themes to MCC leadership to prepare for facilitated sessions.
- **Facilitation and engagement:** Led MCC Board members and stakeholders through collaborative sessions to refine the organization's mission, vision, goals and strategies. Discussions focused on balancing technical education with industry promotion, enhancing engagement with younger members and building organizational sustainability.
- **Plan development and implementation:** Produced a clear, actionable plan that outlined MCC's goals, measurable objectives and tactics, and delivered it in both presentation and reference formats to support communication and execution.



Minnesota Concrete Council

THE RESULTS

MCC adopted a unified strategic plan with clear goals related to education, member engagement, industry promotion and organizational growth.

- The process enhanced alignment among MCC's leadership and membership, clarifying its purpose.
- Survey results were used to directly shape strategic priorities, ensuring the plan reflects real member needs (e.g., expanding technical programs, addressing generational engagement and increasing networking opportunities).
- MCC is now poised to expand its influence as the trusted technical and educational authority for concrete in Minnesota, while also adapting to market pressures from competing materials.

KEY TAKEAWAYS

- **Member voices drive value:** Incorporating extensive survey and interview feedback ensured the plan was member-focused and relevant.
- **Balance technical and promotional goals:** MCC highlighted its technical strengths while also focusing on industry promotion and sustainability.
- **Capacity and sustainability matter:** Addressing succession planning and organizational sustainability will secure MCC's long-term role as an industry leader.



NEU: An ACI Center of Excellence for Carbon Neutral Concrete



THE CLIENT

NEU: An ACI Center of Excellence for Carbon Neutral Concrete is dedicated to accelerating the adoption of carbon-reducing technologies worldwide. Leveraging its affiliation with ACI, NEU serves as a global hub for knowledge, education and verification in the adoption and use of reduced-carbon concrete technologies.

THE CHALLENGE

NEU, an organization established by ACI in 2022, faced the challenge of positioning itself as the trusted authority for reduced-carbon concrete technologies, while addressing the industry's urgent need for innovation and education. Key challenges and needs included:

- Addressing the need for a clearer, market-relevant vision and mission.
- Development of a distinct value proposition from competing organizations.
- Creation of measurable goals and objectives to guide sustainable growth.
- Delivery of consistent internal alignment and external messaging.

THE SOLUTION

AOE worked with NEU to develop a strategic plan tailored to its unique position in the market. Key activities included:

- **Background research:** Conducted interviews with Board members, stakeholder surveys and environmental scans, including SWOT and competitive analyses, to identify NEU's strengths, opportunities and positioning needs.
- **Pre-report development:** Summarized survey findings and insights into a pre-report to prepare NEU's leadership team for further strategic planning discussions.
- **Facilitation and engagement:** AOE led in-person and virtual strategy sessions with the Board and leadership to refine NEU's mission, vision, values, goals and tactics. These sessions focused on measurable objectives, market differentiation and member engagement.
- **Plan development and implementation:** Developed a comprehensive strategic plan with goals, objectives, tactics and measurable targets, formatted into internal and external communication tools, including a PowerPoint presentation and simplified messaging for members and external stakeholders.



NEU: An ACI Center of Excellence for Carbon Neutral Concrete

THE RESULTS

- NEU now has **clear, aspirational vision and mission statements** that reflect its leadership role in reduced-carbon concrete technologies.
- A strong **value proposition** highlights NEU's unique role: utilizing ACI's global resources and partnerships, while serving as the trusted authority in carbon-reducing concrete technologies.
- The plan established **five measurable goals** (knowledge leadership, partnerships, validation/verification, education and financial sustainability).
- NEU achieved **alignment across its board and leadership team**, providing clearer direction for staff and members.
- External messaging (pictured at right) was revised to clearly communicate NEU's differentiation and leadership to the market.



KEY TAKEAWAYS

- **Clarity and alignment:** Facilitating structured discussions among stakeholders helped reach consensus on NEU's future direction.
- **Differentiation matters:** A strong value proposition, linked to ACI's global reach and NEU's expertise, positioned NEU ahead of competitors.
- **Implementation focus:** Measurable targets and member-focused strategies establish accountability and provide a roadmap for ongoing progress.



The Post-Tensioning Institute



THE CLIENT

The Post-Tensioning Institute (PTI) represents a community of businesses and professionals dedicated to expanding quality post-tensioning applications. Members of the Institute include major post-tensioning material fabricators in the U.S., Canada and Mexico; manufacturers of prestressing materials in the U.S., Canada, Mexico, Asia and Europe; and companies supplying materials, services and equipment used in post-tensioned construction. In addition, PTI has more than 500 professional engineers, architects and contractors.

PTI is the only association dedicated to expanding quality post-tensioning applications. To work toward this goal, PTI sponsors a variety of technical seminars specific to the post-tensioning industry. The Institute also offers Plant Certification and Field Personnel Certification Programs, as well as a comprehensive marketing program. PTI's Marketing Committee has developed an aggressive plan to promote post-tensioning by developing new applications (such as prestressed pavements and bridge decks), and by expanding use in established applications (such as buildings and bridges).

THE CHALLENGE

As the post-tensioning method continues to gain acceptance by designers and end-users alike, it was key to look at the services and products provided by PTI. One of the biggest challenges is determining where marketing effort and funds should be allocated, as well as the best way to meet the growing interest in certification.

THE SOLUTION

AOE led PTI through a multi-month strategic planning process that included a deep dive into the four key areas of service: certification, technical leadership, membership value and education. The scope included:

- **Background research:** Conducted interviews with board members, stakeholder surveys and environmental scans, including SWOT and competitive analyses, to identify PTI's strengths, opportunities and positioning needs.
- **Pre-report development:** Summarized survey findings and insights into a pre-report to prepare PTI's leadership team for further strategic planning discussions.
- **Facilitation and engagement:** AOE led in-person and virtual strategy sessions with the board and leadership to refine PTI's mission, vision, values, goals and tactics. These sessions focused on measurable objectives, market differentiation and member engagement.
- **Plan development and implementation:** Developed a comprehensive strategic plan with goals, objectives, tactics and measurable targets, formatted into internal and external communication tools, including a PowerPoint presentation and simplified messaging for members and external stakeholders.



The Post-Tensioning Institute

THE RESULTS

- AOE created a graphic that summarizes the PTI strategic plan and its four main objectives related to certification, technical leadership, membership value and education. This graphic is a visual representation of the Institute's calling and services as a decision-tree related to activities PTI engages in from a strategic standpoint.
- PTI's **vision and mission** statements are used as a means to guide Technical and Education Committees, ensuring all activities link to the strategic plan.
- External messaging was revised to clearly communicate the benefits of PTI as well as post-tensioning.

KEY TAKEAWAYS

- **Clarity and alignment:** PTI's strategic plan serves as a roadmap for all activities for staff, volunteers and governance. Having a visual representation of the plan helps ensure clarity and alignment.
- **Implementation focus:** Measurable targets and member-focused strategies establish accountability and provide a roadmap for ongoing progress.





RECAP

At AOE, we understand that clear direction and actionable plans are essential for organizations to achieve their goals and adapt to evolving industry needs. Our strategic planning services are designed to help organizations reinforce their mission, vision and goals while creating tailored, measurable strategies to drive success. By combining in-depth research, stakeholder engagement and expert facilitation, we deliver comprehensive plans that provide clarity, focus and a roadmap for long-term growth.

This portfolio showcases examples of our work with organizations such as the Iowa Ready Mixed Concrete Association and Iowa Concrete Paving Association, the ACPA Pennsylvania Chapter and NEU: An ACI Center of Excellence for Carbon Neutral Concrete. Each case study highlights how AOE has partnered with clients to address challenges, identify opportunities and create strategic plans that deliver measurable results.

NEXT STEPS

Ready to take your organization to the next level? Let AOE guide you through the strategic planning process to create a clear, actionable roadmap for success. Explore our blog [Strategic Planning 101](#) and [other resources](#) to learn more about our approach. [Contact us](#) today to start mapping your organization's future!

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