From: Todd Carpenter
ISO/TC46/SC9 Secretary

Title: ISO Living Laboratory Presentation and Follow-up Information

Source: Fifth ISO Chairs Conference 16-17 June 2011

Project(s):

Status:

Additional information: There was also an article on the ISO Living Laboratory Project in the July/August issue of ISO Focus+. This article has some additional background information that may be of interest. The magazine is freely available at: http://www.iso.org/iso/iso-magazines/iso-focusplus_index/iso-focusplus_2011/iso-focusplus_2011-07.htm

REQUESTED ACTION
Circulated to P- and O-members, and to technical committees and organizations in liaison for:

☐ information

☐ discussion at
  [venue/date of meeting]

☐ comments by
  [date]

☐ voting (P-members only by:
  [date]

P-members of the technical committee or subcommittee concerned have an obligation to vote.
The fifth ISO Chairs’ Conference

16-17 June 2011

International Conference Centre (CICG)
Geneva, Switzerland

The ISO ‘Living Laboratory’

Kevin McKinley, Deputy Secretary-General, ISO CS
Trevor Vyze, Director Standards Development, ISO CS
Feedback on 2011-2015 ISO Strategy

• Ensure better justification for new work
• Increase competence and effectiveness of Committee Leaders
• Streamline the development process (faster, more efficient)
• Improve stakeholder engagement
Examples of how ISO is responding/adapting

- ISO Central Secretariat initiatives
- ISO TMB plans/implementation
- Selected ISO Council “Projects”
How do these responses relate to what we do?
ISO Living Laboratory – what is it?

• Modelling of the whole ISO process
• “Customer” views
• Quantifying impact of potential changes
• Safe to “play” and to “fail fast”
• Deploy best practices
• Increase capacity across ISO members
ISO Living Laboratory
Activities to date

Value Discovery Workshops & Interviews

- TMB
- CS Staff
- Users
- Developers
- Members

Consolidation

Stakeholder Priorities

Improvement Criteria

Value factors

Issues & Irritants

Key Areas For Improvement

Improvement Initiatives

Living Lab Projects

Quick Wins

Pilot Projects

Key Improvement Areas

General Assembly Feedback

Issues & Irritants

Stakeholder Value Discovery Studies (Volumes 1 & 2)

Improvement Workshops Results

ISO General Assembly Report
## Index of ISO “Customer Value” to date

<table>
<thead>
<tr>
<th></th>
<th>Best Practice Index (0 to +100)</th>
<th>Irritant Index (0 to -100)</th>
<th>Net Customer Value (-100 to +100)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current Baseline</strong></td>
<td>+46</td>
<td>-60</td>
<td>-14</td>
</tr>
</tbody>
</table>
Some of these “Irritants”

- Difficulty getting stakeholders involved
- Process too slow and too complex
- Difficulties working with ISO Central Secretariat
- Lack of committee leadership and dysfunctional meetings
- IT failing to meet needs
- Cost and difficulty in participation
Some of these “Irritants” (cont)

• Blockers, vested interests and politics
• Lack of global, market and customer relevance
• Language and cultural issues
• Negative perception of standards sales model
• Lack of knowledge of ISO procedures
• Lack of cooperation with other standards bodies
[KEYPAD VOTING x 12 IRRITANTS]
‘Quick Win’ Projects

1. Code of Conduct for the technical work

2. Selection criteria for people leading the technical work
‘Pilot’ Projects

1. Radical editing and committee support

2. Dramatic reduction in development timeframes
Model of current ISO process
Pilot 2 – Examples of ideas provided to date to drastically reduce cycle time

- Reduce circulation of proposals to 6 weeks (from 3 months)
- Eliminate Committee Draft (CD) stage
- Change DIS voting from 5 to 2 months
- Conduct initial review after 5 years, not 3
- Combine systematic review & work approval
- Drastically reduce ISO CS treatment times
[Roundtable discussion on additional ideas to drastically reduce cycle time]
ISO Living Laboratory
Get involved!

• Implement ‘Quick Wins’ and share experiences with ISO CS
• Be a case study for ideas coming from Living Lab ‘Pilots’
• Trial your own improvement initiatives (after discussion with ISO CS)
"Living Laboratory" session by Kevin McKinley
Summary of Feedback received during TC Chairs

Background: The Feedback received during the Chairs' Conference has been organized in the Living Lab process pilot by stage of development of ISO deliverables. Though all of the ideas below were carefully reviewed and considered by the Living Lab project team during its last meeting in July 2011, the sections highlighted in yellow will be considered in the implementation of the Living Lab committee trials which are currently underway.

Flexibility

- Flexible process
  - TC option menu
  - Flexibility of TC level with possibility of delegation (depending on the size of the TC), strong leadership at TC level; TC has the mandate to manage and decide the process (voting period, translation, CD level, education, checklist etc....)
  - Scope project at the beginning
  - Choose review dates
  - Choose review stages
  - Choose development time
  - Allow project Managers to decide lengths of key stages according to the complexity of subject matter and other variables industry:
    - Flexibility (if we want to do it in 2 weeks or else, it should be possible.
    - Shorten ballot period
    - Flexibility in circulation of proposals (adapt time to needs).

NWIP

- Good strategic planning for development of the NWIP
- Portfolio management - stop supporting standards with no audience
- NWIP to 6 months
• As most NWIP are approved, propose NWIP as WD format already

• Ask for stakeholders at NWIP stage

• Combine review + work approval (already in place in REMCO)

• Reports that having the right individuals/talents works better than focusing on procedures \(\Rightarrow\) without the right people, procedures will not be successful.

• Need 3 months for NWIP but:
  • Flexibility for revising standards \(\Rightarrow\) at all stages; also \(\not\Rightarrow\) (needs, sectors) \(\not\Rightarrow\)
    • Development paths: need of rules
  • Simplify route for whole process, in particular for revisions, minor changes, “easy” projects

• At proposal stage insist on a good base document – pay someone to develop this base document if necessary

• Good strategic planning for the development of the NWIP
  • Input from stakeholders at early stage

• Combine SR + NWIP

• ISO to tell NSBs to be very selective when appointing experts.
  • Right participation

• WG to set up the required profile – define criteria for experts to participate (CVs are not always use full)

• Integrate SR with NWIP approval avoid “Boiler plate” pro forma non-value adding activities

• Better prioritization of standards

• NWI/WD \(\Rightarrow\) WG mtg \(\Rightarrow\) DIS
• A clear check list since the beginning WG conveners/Secretaries to monitor closely

**WD**

• Combine WD/CD stage.

• WG is “CRUX” TC/SC is only formation many projects

• Separate technical discussion from drafting at drafting stage

• More deadlines and more WG meetings (virtual), teleconferencing
  • More should be done between meetings – use technology to facilitate and speed up committee work
  • Real time collaboration

**CD**

• Separate technical discussion from drafting at drafting stage

• Do not skip CD step

• Go from CD to publish standard directly

• CD: 4, 6 weeks

• Eliminate CD stage ref. DIS stage
  • Stakeholder engagement at that time
  • Don’t reduce DIS time
  • Translation time

• Eliminate CD stage as duplication with DIS, keep one of them

• In Korea only 3: WD ⇔ DIS ⇔ PUBLICATION
• “Sharpen” up the CD process. Currently some WIS get “crapped” in here – constant rounds of C + V. (possibly) eliminate the vote. Use it as a consensus building and stakeholder engagement process.

• Reduction circulation time (3 months is too long) 1 month max

• Emphasis on DIS, Eliminate vote at CD

• Work in // CD stage and DIS stage (only 1 national consultation)

• One stage for national consultation CD/DIS

DIS

• Reduce DIS to 2 months
  • Aligns ISO with other bodies ISO is working with (such as API : 6 weeks!)

• Plan meeting / set up date + time for DIS comment resolution right at launch of DIS to speed-up

• DIS ballot from 5 months to 3 months

• Reduce the DIS voting time from 5 to 3 months if doing so, all markets should be offered the opportunity to translate the DIS in their national language (use the 2 months translation period to do so)

• DIS + FDIS – Combined
  • DIS 4-3 months
  • Exchange comments MB ⇔ Committee – during ballots (not wait end of ballots)
  • Bypass FDIS if good CD
  • Make the TC aware of when the DIS will be balloted so that the NBM can get ready
  • DIS voting 5 months to 2 months / 3 months
  • After completion of DIS ballot and comment review, add a timeslot (if desired) for testing
  • Testing in each country trapped in process time that doesn’t count!
  • Shorten time to 5 months – most consensus reached in CD
Nothing happens at DIS & FDIS -> when a ballot comes back for DIS, after comments on CD – they don’t vote, they approve.

Delete intervention of ISO/CS, committee to finalize DIS and FDIS

Do ISO CS editing during DIS ballot

Plan to resolve DIS comments immediately after DIS closed

Translations after publication

Be flexible about voting periods (to be discussed with committee) ⇒ plan voting periods around committee meetings

Elimination of translation depending on standard
  • French translation should be done on their own and not use up time of developing standards

FDIS

Reduce FDIS to just voting YES/NO

  • Linked to issue of involvement -> issue of comments/blocking at FDIS -> “why didn’t you get involved before?”

  • Flexibility on length of enquiry depending on standard ⇒ be more flexible on skipping FDIS if DIS results are “almost” 100%

Voting comments

Reduce all votes to one month

  • One national consultation + close vote as soon as last votes finished
    • One formal vote

  • Shorten ballot period
    • Flexibility in circulation of proposals (adapt time to needs)
• If ballot fine then video conference within a country (access to these tools?)

• Exchange comments MB ⇔ Committee – during ballots (not wait end of ballots)

**Time suggestions**

• Reduce time most important barriers are blockers
  - Deal with blocker at early stage
  - Better understanding of consensus to speed up decisions

• Allow enough time for translation and consensus and you will have enough time to reduce ISO process time

• Reduce ISO/CS treatment time

• Limitation of repeating each step (WD, CD, DIS, etc..) should be enforced by 2 or 3

• Use of technology to speed up the process and do more work between meetings, meet on line, mail exchange, conference calls

• Enforce strict time frames

**Project Management / support**

• Manage as a project
  - Meaning info committee members of their resp./ownership to stick to the schedule/scope
  - Understand risks
  - Have a chair whose has a management/team convenor.

• Project definition
  - Needs investment for clarity and scope and cost management

• Support to manage / facilitate the process so the expert is better used and more efficient

• Secretariat support needed
Streamline and standardize project planning. Use ISO 9001 clause 7.3 to manage design. Development of new products

Recognition and reward

- Reward excellence – Recognize professionalism well organized workflow, active mgmt. of the project.

Drafting comments

- Education all involved – experts/P/L’S/Convenor etc...
- **We don’t tell people how to do it and then they come in needing to be educated. People unfamiliar with how the development process works**
- Better collaboration tools to exchange documents/comments
  - Use of collaboration tools – share point everyone can look at document together with rules pointed toward one draft conf.
  - ISO livelink is not a good collaborative tool, not easy to use
- Good tool to automate (OPM) automated structuring technique
- Automatic generation of standard
  - automate part 2
- Automated structuring technique
  - new way of compiling a draft “OPM”
- **Commenting should be done much better to reduce redundancy do it electronically, group comments better and make the treatment were more transparent over the whole process - Use electronically based communication more interactive**
- Shouldn’t need procedural knowledge only EXPERT knowledge
- Elimination of word “Form” which impacts ability to comment on-line
• ISO/CS needs a style sheet so that all document are easier to put together this will speed the process

• Handling of comments (same comments again and again) should be more transparent (continuity of answers to comments) known by the group

1. "ATTENTION" (danger Webex) in normal meeting = breaks help a lot to find consensus – (not possible with Webex)
2. Not too short ballot time