



OUT-103: Ambassadors & Relationship Managers – 15 July 2021

Purpose

The policy addresses the role, responsibilities, and the appointment of INCOSE Ambassadors and Relationship Managers.

There remain many parts of the world, and industrial domains, where INCOSE is unknown or has only minimal presence. The position of Ambassador is recognized to address these shortfalls.

When relationships are developed between INCOSE and an external organization a Relationship Manager is appointed to facilitate this relationship.

Applicability

The policy is primarily applicable for the appointed INCOSE Ambassadors and Relationship Managers.

Indirectly it is also applicable for all INCOSE leaders, in particular for the Director for Outreach and the Outreach group, the Chapter Presidents, Sector Directors, Technical Director, Services Director, and Working Group (WG) leaders.

Definitions

INCOSE Ambassador

An INCOSE ambassador is a member of INCOSE, representing the interest of INCOSE to different groups and entities and at non-INCOSE events. The ambassador will promote INCOSE and seek to enhance growth, collaboration, influence and/or achievement of INCOSE's mission. The ambassador will be versed in the values streams and strategic objectives of INCOSE and will endeavour to build on these foundations with all external partners.

INCOSE <specific> Ambassador

For an ambassador identified for a specific role or group, this type of ambassador fulfils the obligations of an INCOSE ambassador as defined under the Definition of an INCOSE Ambassador with the additional focus on the specific role or group as identified.

For example,

- An Industry Ambassador will be focusing on representing INCOSE to different Industry groups and entities and at Industry related non-INCOSE events.
- A Domain Ambassador will focus on representing INCOSE to different domains at Domain related non-INCOSE Events.



- A Membership Ambassador will represent INCOSE at events and meetings and be able to discuss the benefits and value of being an INCOSE member with the intent of growing membership through attraction and engagement strategies.

Relationship Manager

A Relationship Manager (RM) is a member of INCOSE and manages the relationship between INCOSE and an Alliance organization. The RM will facilitate the joint collaboration between INCOSE and the alliance organisation, to enhance growth, collaboration, influence and/or achievement of INCOSE's mission.

Policy Content

Roles and Responsibilities

Ambassador Role and Responsibilities

Ambassadors are INCOSE members knowledgeable on INCOSE matters and can represent the organization in a manner using vocabulary that is sensitive to geographical and industry domain culture. Qualification guidance includes:

- Must be an INCOSE full member,
- Must be able to demonstrate knowledge of INCOSE,
- Must be able to demonstrate knowledge of the specific area he/she will be representing INCOSE in,
- Must be able to demonstrate knowledge of Systems Engineering and some basic understanding of other systems related topics, and
- Have a high level of communication skills.

Ambassadors shall meet specific international growth or industrial domain objectives. They are charged to fulfill five primary objectives:

1. Understand the needs of the systems engineering community in the nominated country, geographical sector, professional association or industrial domain. This includes identifying the profile of domain usage, key competencies and valuable insights of the target community, and opportunities for joint work products, events and exchanges.
2. Communicate the value of INCOSE, and interpretations of its products and principles, to the target community in its own vocabulary.
3. Facilitate additional exchanges of insight between INCOSE interested parties and the target community on the views, domain challenges and usage / language of such stakeholders.



4. To support the identification of new chapters, encourage establishment of industry-oriented working groups and, where appropriate, build alliances for collaboration with INCOSE.
5. Provide a conduit to industries in which INCOSE / Systems Engineering may or may not have been utilized / represented.

Relationship Manager Roles and Responsibilities

RMs are INCOSE members knowledgeable on INCOSE and on matters common with the alliance organization. Qualification guidance includes:

- Must be an INCOSE full member,
- Must be able to demonstrate knowledge of INCOSE,
- Must be able to demonstrate knowledge of the alliance organization he/she will be liaising with,
- Must be able to demonstrate knowledge of Systems Engineering and some basic understanding of other systems related topics, and
- Have a high level of communication skills.

Relationship Managers are charged to fulfill 3 primary objectives:

1. Communicate, coordinate, and collaborate on joint activities and events with their alliance counterpart.
2. Liaise with respective INCOSE leaders on activities related to their area of responsibility.
3. Monitor, track, and assist in leading alliance agreement activities.

INCOSE Leadership Roles and Responsibilities

The INCOSE leadership, as defined in Policies BOD-100 and BOD-101, have the responsibility to support Ambassadors and Relationship Managers. These responsibilities, nominally discharged by the Director for Outreach, include:

- To identify potential candidates within the specific sector, country, or industry / domain who have the organizational capability to establish, strengthen and broaden collaborations and Alliances, working with or on behalf of INCOSE. Approved candidates shall receive business cards and appropriate communication materials to support them in their activities.
- To facilitate access to INCOSE products, provide INCOSE promotional materials and other support (including planning and budgeting) to these candidates in support for their role and responsibilities.
- To guide Ambassadors and Relationship Managers in the external promotion of INCOSE's Products and Technical Services, including Events, Training and the Systems Engineering



Professional (SEP) Certification programs; encourage mutual participation and broadening of content as appropriate.

- To provide an open and receptive audience for the Ambassadors' interpretations of the target community's needs, insights and values.
- To ensure that the rest of the INCOSE leadership are regularly updated on outreach activities, outcomes and key messages. In addition, to make recommendations about how to proceed and follow-up with contacts made in various organizations.
- Senior INCOSE Leaders will be selected as Sponsors for alliance agreements to support Relationship Managers, when necessary.

Delegated Authority

Ambassadors have the right to represent INCOSE worldwide; interact with engineering or policy groups or associations in government, industry and academia; and explain what INCOSE has to offer to industry, academia, governments, and individuals. To this end, Ambassadors are expected to keep themselves generally informed about INCOSE bylaws, policies, and initiatives.

Relationship Managers have the right to represent INCOSE to their alliance counterpart and organization. To this end, Relationship Managers are expected to keep themselves generally informed about INCOSE bylaws, policies, and initiatives.

Ambassadors and Relationship Managers cannot commit INCOSE legally or financially. They should bring such questions to the appropriate Sponsor, Sector Director, the Technical Director, the Services Director, or the Director for Outreach, for the ultimate attention of the Executive Committee.

Reporting and Communications

The Ambassadors report to the Director for Outreach. Ambassadors for a country, region or sector should also liaise with the relevant Chapter President if one exists, or to the appropriate Sector Director. Ambassadors to industrial domains, industry associations or professional bodies should also liaise with the relevant INCOSE Working Group Chair. Relationship Managers should liaise with the relevant INCOSE leaders with respect to the joint activities in progress.

As the potential for starting a new industry-oriented working group grows, Ambassadors shall work with the Technical Director to transfer responsibility for startup. In all cases, Ambassadors should become members of the Industrial Outreach Board (IOB), and report to the IOB Chair. The IOB provides an opportunity to share experiences and practices with other Ambassadors. Relationship Managers will be invited to IOB meetings, as appropriate.



Term of Service

Ambassadors are appointed by the President, at the recommendation of the Director for Outreach, for a period of three (3) years. They can be reappointed. There is no limit in principle to the number of Ambassadors, but the number should be kept to what is necessary and manageable.

Relationship Managers are appointed by the President, at the recommendation of the Director for Outreach, for the duration of the alliance agreement (normally 3 years). They can be reappointed if the alliance agreement is reinitiated.

Related Policies and Procedures

Policy OUT-100 Outreach Principles

Policy OUT-101 Guidelines for the Formation and Approval of Alliances, MOUs, and MOAs

Policy OUT-102 Industry Outreach Board (IOB) Charter

Procedure OUT-PROC-01 Creating and Maintaining Alliance Agreements

SUPERSEDES: OUT-103 dated 26 April 2019

APPROVED BY: INCOSE Board of Directors – Virtual, 15 July 2021

POLICY OWNER (RACI Responsible R): Director for Outreach

MAINTAINED BY (RACI Accountable A): President-Elect