

CREW Orlando Strategic Plan: 2017

Introduction and Overview

CREW Orlando is the regional chapter of CREW Network, a professional organization committed to the success of women in commercial real estate. This Strategic Plan has been developed through the collaborative efforts of the 2017 CREW Orlando Board of Directors and committee co-chairs. Together, we have developed the vision for CREW Orlando as we look to the future. This Strategic Plan identifies the chapter's key goals and objectives collaboratively identified to successfully achieve the chapter's vision.

Core Purpose

CREW Orlando, as with CREW Network, exists to influence the success of the commercial real estate industry through advancing the achievements of women in the industry. CREW Orlando encourages this success through the programs it provides, the events it plans and the networking opportunities it offers.

Core Values

- We highly value excellence in everything we do and strive for it in reaching our goals and fulfilling our vision.
- Our focus is on promoting and supporting women at every stage of their careers.
- We value social connection and encourage building lasting, loyal relationships both personally and professionally.
- Our chapter is inclusive and treats every member equally regardless of experience level.
- We value education and information sharing by providing a variety of relevant, informative and engaging programming.
- We value networking through member-to-member business connections and transactions, and serving as resources to each other.
- We promote leadership in our members by celebrating the success of inspirational women and by providing opportunities to learn and grow as leaders.

Goal 1: Our Vision and “Big Audacious Goal”

By 2019, CREW Orlando will be the leading commercial real estate organization in Central Florida, attracting, engaging and retaining the highest quality of decision-makers in commercial real estate while continuing its mission to grow the number and influence of its members in the industry, to promote business development, and to cross-network both internally and externally. The leadership of our organization should embody, strive towards and live our goals.

Objectives:

- Become the pre-eminent powerhouse for attracting, engaging, and retaining the highest quality of decision-makers in commercial real estate.
- Be recognized as the number one “must join” CRE industry organization.
- Differentiate ourselves from other commercial real estate organizations, e.g. NAIOP or ULI.
- Integrate technology through websites, apps and social media to enhance direct member-to-member communication.

Strategies:

- Maintain our momentum by offering quality events, receipt of recognition of our community involvement and internal CREW member awards and promotions.
- Promote the brand through public relations and using CREW Network tools, e.g., like/share CREW Orlando Facebook posts, or tag CREW Network or CREW Tampa.
- Congratulate CREW members through media resources such as Orlando Business Journal, Orlando Sentinel, etc.
- Leverage Convention and other event highlights (Celebration of Champions, golf tournament, UCREW’s university outreach, etc.) by creating a media outreach plan with assignments.
- Develop an overall marketing plan that includes getting more media attention for signature programs, possibly including one or more community service projects.

Ownership:

All Committees:

- Draw upon the resources provided by CREW Network in the various “Gold Standard Playbooks” to continue to meet the “gold standard” and achieve excellence within our organization.
- Share with the Communications Committee specific event information or member awards and honors to be distributed via e-blast, social media sites, etc.

Communications Committee:

- Continue to use and improve the CREW Orlando website and other social media outlets to draw attention to the organization.
- Educate our membership as to the ease and efficiency of using social media tools.

- Continue to work with media resources and other trade organizations to elevate CREW Orlando through exposure to our events and by highlighting the success of our members.
- Recognize members' achievements through Facebook posts, newsletter articles and other relevant resources.

Member Services Committee:

- Continue to plan educational Marketplace Lunch events that are relevant to the commercial real estate industry.
- Consider planning additional educational events as opportunities arise.

Programs Committee:

- Continue to develop timely, newsworthy educational programs, i.e. monthly luncheons and other events that are relevant to the current marketplace.
- Continue to recruit quality, primarily female, speakers to draw interest from the commercial real estate industry from a diverse array of backgrounds.
- Encourage and honor the professional development of women through successful Women at the Top events.
- Provide additional information and follow-up communication for upcoming events at monthly luncheon programs.
- Create slideshow to be presented at each monthly luncheon (through contribution by other directors) that highlights upcoming events and member-to-member business.

Special Events Committee:

- Encourage the success of one another through award nomination and recognition at our annual Celebration of Champions event.
- Continue to create quality events (i.e. Celebration of Champions and the annual golf tournament) that draw attendees from across the commercial real estate market.
- Partner with the event venue and vendors to market and promote CREW Orlando events on the venue's website, Facebook page and other social media outlets.
- Send personalized thank-you notes to event sponsors.

Sponsorship Committee:

- Redefine and more specifically categorize our current sponsorship levels and the benefits associated with them in order to more adequately provide value to our sponsors to continue to draw their support.

UCREW Committee:

- Reach out and continue to build relationships with local colleges and universities to provide educational events regarding commercial real estate and CREW's involvement in the industry.
- Continue to develop and host the unparalleled UCREW event on an annual basis to encourage the involvement of students in commercial real estate.

- Educate students as to the scholarship opportunities available through CREW Foundation.

Goal 2:

By 2019, CREW Orlando will have evolved its membership in terms of number and diversity (gender, ethnicity and business type), and increased member participation and retention rate.

Objectives:

- Increase membership quality in terms of number, retention and diversity.
- Increase membership engagement and individual participation and foster a culture of “contagious energy”.
- Achieve organizational diversity in terms of gender, ethnicity and business type.
- Develop effective new member outreach to introduce new members to CREW Orlando’s various opportunities.
- Target specific candidates for membership to achieve diversification goals.

Strategies:

- Continue new member outreach and communicate various opportunities within CREW Orlando that align with the member’s personal goals for membership.
- Develop an effective one-on-one mentoring program for new members that focuses on identifying the new member’s interests and the reason for joining the organization and serves to help guide the new member in becoming an active part of the organization.
- Appoint long-term members or past presidents as ambassadors for the organization who can familiarize new members with opportunities available in the organization and the benefits of membership.

Ownership:

Board of Directors:

- Identify and target for membership specific individuals in the industry who would add value to the organization, are key decision makers in their field and who uphold the values of CREW Orlando.

Membership Committee:

- Continue to conduct exit interviews/surveys with non-renewing members.
- Engage less active members to determine interest areas for involvement.
- Actively include past leadership and current membership to assist in member retention.
- Pair new members with a mentor (who may not necessarily be a sponsor) to help develop the new member’s connection and growth with the organization and the industry.
- Continue to host the “new member breakfast” to recognize and welcome new members to the organization.

Member Service Committee:

- Continue the “new member table” at monthly luncheons to create networking opportunities specifically for new members.
- Engage all new members to determine why they joined CREW, what they can add to the organization and what they hope to gain. Use that information to assist the Membership Committee in pairing new members with a mentor.
- Create specific nametags for the past presidents to wear at CREW luncheons and other events so that they can act as ambassadors for CREW Orlando.
- Continue to host outstanding events that draw the interest of the membership.

Goal 3:

By 2019, CREW Orlando will have utilized its leadership program to develop additional leaders and will have created additional personal and professional development offerings that teach leadership skills within its membership base.

Objectives:

- Continue to develop our new and future leaders in the chapter while enriching our current membership through personal and professional growth opportunities.
- By 2019, celebrate the success of CREWorks and be known by employers for producing advanced skills in employees.
- Establish an educational and career advancement series.

Strategy:

- Develop CREWorks, CREW Orlando's exclusive leadership program, devoted to assisting members in taking the next steps in their careers and empowering them to be even stronger leaders.
- Partner with interesting, enlightening speakers for CREWorks that can provide insightful direction and develop the key tenets of an excellent leader, i.e. effective communication.
- Provide other education-specific programming to the younger members of CREW Orlando in Future Leaders.

Ownership:

Leadership Committee:

- Develop a curriculum for the leadership program that meets the needs of the membership and encourages their growth and development both personally and professionally.
- Develop a budget and appropriate price-point for CREWorks that represents the value the program provides.
- Develop a marketing strategy that includes videos and promotional materials at monthly luncheons, e-blasts to the membership, personal invitations, newsletter articles and the development of a webpage on the CREW Orlando website.
- Differentiate the program from other competing leadership programs and showcase its particular benefits.

Future Leaders:

- Develop informative and educational programming and events that more specifically address the needs and development of Future Leaders.
- Pair Future Leaders with a mentor who can provide direction and advice in building a career in commercial real estate, i.e. continue to hold mentor lunches.

Goal 4:

By 2019, CREW Orlando will have claimed technology as a key differentiator in supporting its members and its market operations.

Objectives:

- Integrate technology in such a way so as to make CREW Orlando a household name with members and non-members alike.
- Use cutting edge technology to improve efficiency of communications with members and non-members.
- Implement new technology strategies to increase member participation, including using technology for more effective communication.
- Expand and develop advancements in technology.

Strategies:

- Seek expertise within CREW Orlando or within the community to brainstorm the vision of cutting edge technology and identify internal capabilities to further expand the CREW Orlando brand.
- Rename the Communications Committee the “Communications and Technology” Committee and create a subcommittee to specifically address technology issues.
- Leverage the resources of CREW Network and other chapters with respect to technology ideas and capabilities for improving the CREW Orlando website.
- Transition to an electronic directory with bookmarking capabilities.
- Improve the website for ease of use both as a mobile site and desktop site.

Ownership:

All Committees:

- Promote the use of the CREWbiz directory and update member profiles in the directory.
- Continue and increase the chapter’s use of social media outlets, e.g. Facebook and Instagram where members “like”, “share” or “tag” CREW events, pictures, etc.

Communications Committee:

- Further develop the CREW Orlando website to add additional web pages including those dedicated to leadership, members’ success and job postings.
- Revamp the CREW Orlando website to highlight the success of our members, announce upcoming events, access members’ profiles and register for programs or luncheons.
- Create a customized mobile-friendly website.

- Educate membership on the usability and function of CREWbiz through marketplace lunch presentations and inclusion of a technology story or tip section in the quarterly newsletter.
- Target member involvement in this committee from the Future Leaders' segment of the organization to capitalize on the next generation's perspective and expertise in re-designing the website and adding other technology updates.

Goal 5:

By 2019, CREW Orlando will be one of the most influential members of the CREW Network global organization.

Objectives:

- Elevate the CREW Orlando brand within the CREW Network environment, e.g. through hosting convention, and become a resource for other chapters.
- Dedicate resources to help bridge the gap between our local chapter and our national organization to further enhance our shared mission.

Strategy:

- Host an outstanding 2019 convention!
- Focus on the return on investment and the value membership brings.
- Meet the Gold Standard in other ways and share where we shine with others.

Ownership:

All Membership:

- Create and develop a separate “convention liaison committee” focused on addressing the logistics of hosting convention, i.e. dine-arounds, tours, etc.
- Create video interviews for the purpose of igniting excitement about convention.
- Act as an ambassador for CREW Orlando in communications with members from other chapters.
- Participate in (and encourage others to participate in) the programs CREW Network provides such as the Certificate in Leadership Program.
- Attend and actively participate in convention.

Network Liaison Committee:

- Share CREW Orlando’s success with other chapters through the CREW Network community blog posts and monthly board hosted call.
- Meet the Chapter Challenge with 100% Board participation and at least 50% chapter participation in contribution to CREW Network.
- Encourage all members to update their profiles on CREWBiz.
- Increase the number of attendees from CREW Orlando at CREW Convention and other Network events.
- Educate the membership as to the goals and priorities of CREW Network and the scholarship opportunities it affords.
- Educate and distribute to members via social media or e-blast the White Papers created by CREW Network.
- Communicate via the quarterly newsletter or on social media member-to-member CREW Network business.

Goal 6:

CREW Orlando will consistently be a force and resource in the Orlando community.

Objectives:

- Grow our community connection through outreach, programming and involvement.
- Broaden student engagement from cradle to grave.

Strategy:

- Consider community-based involvement for the Orlando community such as UCREW, Valencia Foundation and other efforts.

Ownership:

Special Events Committee:

- Consider partnering with targeted organizations or identifying projects to accomplish that would benefit the community such as the Tower of Light.
- Assess what volunteer opportunities or charitable contribution amounts may be needed and determine whether the membership is interested in pursuing such an endeavor, perhaps through a survey or other means of gauging membership interest and dedicated participation.
- Determine a strategy to raise funds for the designated project or organization that does not impact the budget of other CREW Orlando events.

Goal 7:

By 2019, CREW Orlando will have focused on generating increased member-to-member business opportunities for its members, as well as increased awareness of how members are helping each other in business.

Objectives:

- Develop a strategy to encourage, magnify and highlight member-to-member business.
- Offer skill-enhancing training that is targeted at building a certain skill set, e.g. business development or presentation skills.
- Add to the CREW Orlando website information that identifies members as subject matter experts.
- Have individual members offer skills training via WebEx on industry-related topics.

Strategy:

- Encourage and facilitate member-to-member deals by offering educational events that highlight various sectors of the industry
- Continue to offer networking events that focus on building personal relationships and member-to-member business
- Acknowledge member-to-member business at all committee meetings, in social media outlets and the CREW Orlando newsletter, and award it in a meaningful way

Ownership:

All committees:

- At each committee meeting, time should be spent discussing specific member-to-member business.
- At each committee meeting, 2-3 minutes should be designated to discuss committee members' specialty areas. This can be done by all committee members at each meeting or committee members can alternate months to discuss their area of expertise. Possible topics for discussion can include:
 - An introduction by the committee member, what they do and what type of referral is a good referral for them.
 - An introduction by the committee member and their area of specialty while two-three other committee members provide feedback to the presenting member ways in which they can help provide business to that member.
 - An introduction by the committee member and an explanation by that member of how they have worked with other CREW members on prior deals.
- Each director to report member-to-member business from their respective meeting to the communications committee.
- Include new members in the member-to-member business opportunities.

Member Services Committee:

- Provide information cards to report member-to-member business at monthly luncheon programs. All records of member-to-member business to be kept for consideration of award nomination.

Communications Committee:

- Member-to-member business to be posted to the CREW Orlando website, Facebook and other social media outlets.
- Add member-to-member business to quarterly newsletter.
- Slide of member-to-member business to be created and provided to the Programs committee to be included in the scrolling luncheon slideshow.

Goal 8:

Build a strategic board:

- Address transparency concerns including how succession occurs and board members selected.
- Assure transfer of institutional knowledge to next leaders when board positions change.
- Develop a succession plan for the future leadership of CREW Orlando and its respective committees by identifying future leaders early and nurturing them in new roles.
- Become more strategic and less operational as a board, thus allowing more time to recruit and to support alignment of committee efforts with the strategic plan.
- Address issues of diversity, including ethnic, gender and industry sector.

Objective:

- Transition from an operational board to a strategic board that can more adequately focus on long-term goals and the future of CREW Orlando.

Strategy:

- Survey each committee and create benchmarks for measurement by utilizing the CREW Gold Standard Playbook.
- Board members to create board reports with a specific focus on the goals and strategies of their respective committee. Board reports should also track the progress and implementation of these strategies.
- Report results annually to the members.

Ownership:

Board of Directors:

- Follow the Gold Standard Playbook created specifically by CREW Network for their committee if applicable.
- Think strategically, looking at the “big picture”, for the future of their committee in relation to the goals and strategic plan for CREW Orlando.
- Add a budget report to every board report and reconcile spending with budget.
- Create and further develop goals for the committee that align with the goals of CREW Orlando and its strategic plan.
- Create a metric for measurement in order to ensure that the goals are met and the strategic plan implemented.
- Be open with how board members are selected on an annual basis and the process involved in making the selections.
- Promote an attitude of positivity and reward committee members and/or co-chairs for their efforts to accomplish the defined goals.

- Consider providing to the membership, in either an annual report or a quarterly newsletter a “State of CREW Orlando” segment to provide further information about our goals and the strategies implemented to reach them. Achievements should be highlighted.