

CREW Orlando Strategic Plan: 2023

Build Relationships, Build Value, Build Business

VISION: CREW Orlando is and will remain the leading commercial real estate organization in Central Florida by attracting, engaging, and retaining the highest quality of decision-makers in the commercial real estate industry while continuing its mission to (i) grow the diversity, number and influence of its members, (ii) promote business development and (iii) be a resource for our members by providing tools that encourage their continued growth and success within the commercial real estate industry.

Focus Area 1: Sponsorship Growth and Retention-- Responsible Committee: Sponsorship, Membership, Communications

Goal Statement: Sponsorship Growth and Retention: The primary goal of the sponsorship committee is to raise funds to support the goals, initiatives, and events of the chapter.

Goals:

- Secure \$200,000 in sponsorship dollars by the end of 2023, and increase the amount of sponsorship dollars raised annually by 2% year over year
- Retain 80% of sponsors on an annual basis
- By the end of 2023, increase the number of annual sponsor companies by 5% and continue to do so year over year
- Add 2 new sponsors who are not currently CREW Orlando members (must qualify for CREW membership) by the end of 2023

Tactics:

Sponsorship Committee

- Continue the sponsor orientation event on an annual basis to make sure sponsors are familiar with and know how to utilize their benefits
- Continue to provide value to sponsors by including within the sponsorship package highly valued benefits and providing a high-level of “customer service” by a designated concierge who contacts their assigned sponsors on at least a bimonthly basis to “touch base” and provide information about unused benefits; when contacting sponsors, concierge should contact each member of sponsor’s company (not just those using the included membership) to make sure all sponsor company’ members are aware of and understand benefits and receive the same customer service.
- Continue to provide a roundtable event that allows the top three sponsor tiers sponsors to communicate directly with the board/sponsorship committee
- Create a “communication checklist”, schedule, and template emails to be sent to sponsors by concierge to be sure each sponsor receives the same information
- Stay on top of the sponsorship benefits and be sure all benefits are being offered to sponsors, working in tandem with other directors who may be responsible for carrying out the benefit

- Create multiple target lists for both annual and event sponsors to track leads and assign sponsorship committee members to each identified potential sponsor to follow up
- If a company cannot sponsor annually, always ask whether they would be able to sponsor an event

Sponsorship Committee and Membership Committee:

- Sponsorship and Membership to partner together to identify potential new members/sponsors on an annual basis and formulate a list of prospects

Communications Committee:

- Update CREW brochure on an annual basis as a resource for raising sponsorship dollars
- Update CREW Orlando website to include links to sponsor companies' websites
- Be sure that sponsor companies' logos are included on e-blasts
- Follow sponsor companies and provide spotlight advertisement on social media for Champion, Empowerment, Partner and Contributing sponsors
- Post articles or links to articles as provided by sponsor companies on LinkedIn
- Facilitate social media takeover by sponsoring company when interest arises
- Complete a one-on-one interview or write-up about sponsoring company or member of sponsoring company for Champion, Empowerment and Partner sponsoring companies

Focus Area 2: Membership Growth, Retention and Diversification—Responsible Committees:

Membership, UNITE, Communications, Member Services, Future Leaders, Equip2Elevate

Goal Statement: The Chapter will both retain members and grow by creating and maintaining a diverse and inclusive membership. We will educate our members, provide them with necessary tools to excel in their careers (i.e. scholarships to Network leadership events, professional development workshops or possible mentor opportunities), help create business networking opportunities, and ensure that all members understand the wide-ranging benefits of a CREW membership.

Goals:

- Membership Growth: By the end of 2023, CREW Orlando will be comprised of 333 members
- Diverse Growth: CREW Orlando will add at least 5 new members per year from diverse backgrounds and 2 new members per year from underrepresented disciplines within the Qualified Fields of Commercial Real Estate (QFCRE)
- Membership Retention: On an annual basis, CREW Orlando will retain 82% of its membership
- Active committee members (those who are actively involved by completing tasks or making noticeable contributions to the chapter) will increase by 2% year over year

Tactics:

Equip2Elevate Committee:

- On an annual basis, CREW Orlando will provide a professional development event to its members and/or provide one scholarship to CREW Network's leadership programs

Membership Committee:

- CREW Connections will continue to offer member onboarding classes to new members, familiarizing them with the benefits of CREW, providing training on CREWbiz and encouraging their active involvement in a chapter committee
- The Membership Committee, potentially in partnership with UNITE, will host a recruitment event offering members and non-members the opportunity to build relationships with one another and understand the value of CREW

UNITE Committee:

- CREW Orlando will partner with at least two other affinity groups (i.e., the Hispanic or African American Chamber of Commerce) to create new connections
- CREW Orlando will partner with other organizations, such as Get REAL, to promote and provide educational opportunities and DEI Awareness for our members

Communications Committee:

- CREW Orlando will highlight the achievements of a committee member on a quarterly basis through a social media post

Future Leaders Committee:

- Visionaries program to be held on an annual basis
- The Future Leaders committee will host a Future Leaders kick-off event to encourage participation within the committee and chapter

Members Services Committee

- At least four Members Only events will be held per year that provide the opportunity for networking and/or education to the membership

Focus Area 3: Programming—Responsible Committees: Programs, UNITE, Sponsorship

Goal Statement: CREW Orlando's programming and events will be timely, engaging and focus on featuring speakers or vendors of diverse backgrounds

Goals:

- CREW Orlando will host 9 monthly lunch programs in 2023 on topics relevant to commercial real estate
- Every monthly lunch program should include at least one female panelist or moderator
- At least 33 % of our program speakers should be a current CREW member or a representative from a CREW member's company
- At least 33% of our programming or events should include a speaker or moderator of a diverse (underrepresented) background

Tactics:

Programs Committee:

- Always ask whether a speaker or moderator who is female or of a diverse background with similar qualifications is available
- Consult our chapter CREW speaker directory for possible speakers before considering non-CREW members as potential speakers
- Programs calendar to be created and set at November planning meeting allowing for long-term planning

Programs Committee and UNITE Committee

- Programs committee and UNITE committee to provide contacts to the Chapter Administrator for creation of a CRE reference directory that includes suggestions for possible speakers by the end of 2023

Sponsorship Committee

- Follow up with sponsors at beginning of the year to see if they would like to add someone to the speaker directory.

Focus Area 4: Marketing and Virtual Footprint—Responsible Committees: Communications

Goal Statement: CREW Orlando will expand its virtual footprint through targeted marketing campaigns and an online social media presence

Goals:

- Create an annual strategic marketing plan so that marketing campaigns and social media content can be developed early
- Run targeted marketing campaign quarterly supporting one of the organization's focus areas such as DEI, Community Impact, Membership, etc.
- Increase metrics, such as online viewer engagement, etc. by 3% per platform per year
- Create a monthly or quarterly digital e-marketing newsletter for new member announcements, program recaps, member spotlights (news, business deals, "faces in prominent places", members on the move, etc.) and upcoming events
- Find opportunities to include video content (reels) in marketing campaigns

Tactics:

Communications Committee:

- Each committee's board report will include a section dedicated solely to upcoming events/marketing ideas, or Communications will be given up to 10 minutes at each board meeting to proactively discuss marketing initiatives

- Communications will actively reach out to directors for event information based on the timing of events from the prior year
- Communications Calendar to be created/updated and shared with all committee members and directors (through board report)
- Find ways to increase interest in social media posts and e-blasts by creating a “CREW in 5” blast or interviews with members

All Directors:

- Directors will provide the Communications committee with event information 60-90 days prior to an event
- Directors will include in their board reports (1) all Member-to-Member business, and (2) all important member positives (job changes, promotions, etc.). The Chapter Administrator will compile this information from each director’s report into a one-page sheet to be provided to Communications for newsletter.

Focus Area 5: Member-to-Member Business Growth—Responsible Committees: Communications and Member Services

Goal Statement: CREW Orlando will continue to emphasize building member-to-member business and provide opportunities to help CREW members do deals together

Goals:

- Report member-to-member deals each month to establish the baseline for both existing partnerships and newly established partnerships
- Develop and promote benefits of new business partnerships within the membership each month.
- Record 50 member-to-member deals per year with a growth in reporting by 10% each year
- Award exceptional member-to-member deals and the exceptional achievements of CREW Orlando members through the annual Celebration of Champions

Tactics:

All Committees:

- Designate one member from each committee to record all member-to-member business deals and member positives (job changes/promotions) for inclusion on board report.
- As new committee members join, directors to start committee meetings by asking members to introduce themselves and identify projects or referrals

Communications Committee:

- Create an easier method of recording member-to-member business potentially through the app or verbally through committee meetings
- Continue to encourage member-to-member reporting by offering a quarterly incentive

- Continue to emphasize that “CREW is crucial” and “CREW first” to deal makers
- Consider adding a page to our website focused specifically on highlighting member-to-member business connections and continue to do so on social media
- Create an open forum specific to CREW Orlando on the app for members to post jobs/projects

Member Services

- Establish one “member-to-member” event in 2024 that focuses solely on opportunities for members to work together

Focus Area 6: Succession Planning—Responsible Committees: Future Leaders, All board, Special Events, Programs, President-Elect

Goal Statement: CREW Orlando should consistently identify and create a pipeline of emerging leaders for our chapter to preserve CREW Orlando’s legacy

Goals:

- On an annual basis, each director should identify at least one person who should be considered for a future chapter leadership position or scholarship to CREW Network convention
- CREW Orlando should continue to support and encourage the growth of future leaders within our chapter by offering at least one scholarship to CREW Network’s Emerging Leaders’ program annually or continuing to create mentor opportunities for Future Leaders
- Each committee playbook should be updated on an annual basis to provide for clear direction to future chapter leaders

Tactics:

All Board:

- Each year, CREW Directors will be asked to revisit succession plans for their respective committees and provide feedback to the Executive Committee identifying potential future leaders.
- Each committee director is responsible for updating the committee’s playbook with updated and relevant information
- Co-Chairs should work hand-in-hand with the Director to be mentored for a future board position

Future Leaders:

- The Future Leaders committee will continue to work with the Past Presidents to provide mentorship opportunities

Special Events:

- Highlight the work of a committee co-chair by adding a “Co-Chair of the Year” award
- Celebrate the success of our members and other deserving non-members through an annual Celebration of Champions

Programs

- Add co-chair pictures to the monthly Program slides to recognize the work done by the co-chairs within our chapter

President-Elect:

- The “Path to Leadership” happy hour will be held on an annual basis to answer prospective board member questions, provide transparency to our membership in the board selection process. and to assist in identifying potential leaders

Focus Area 7: University and Community Impact—Responsible Committees: UCREW, UNITE, Special Events, Communications

Goal Statement: CREW Orlando will continue to impact our community by continuing to find ways to expand our community involvement and provide opportunities for college students to familiarize themselves with CREW.

Goals:

- CREW Orlando will hold a UCREW event annually
- CREW Orlando will hold an annual golf tournament with a goal of raising \$25,000 to fund CREW scholarships
- CREW Orlando will spearhead a large-scale community project every three-five years that ties in with a relevant societal issue of importance within Central Florida
- Annually, CREW Orlando will partner with 1-2 community organization, i.e. Strengthen Orlando, or find/create events to impact the community

Tactics:

UNITE Committee:

- Continue to identify possible community involvement projects through working with our contacts throughout Central Florida such as the City of Orlando or Orange County, or through CREW Orlando members
- Identify one-two small ways CREW can impact the community and implement a framework for participation

UCREW Committee:

- Continue to identify contacts at colleges and universities to develop partnerships for planning and promoting the UCREW event and for awarding scholarships under the CREWS program
- Hold or participate in a career fair on a local college or university campus to familiarize students with potential internship opportunities

- Provide student mentorship or internship opportunities on an annual basis
- Use Past Presidents to develop relationships with colleges and universities as needed

Communications Committee:

- Develop targeted social media campaigns to promote the UCREW event, CREWS scholarships or community project