



# Strategic Plan

Update *June 10, 2019*

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## 3-5 YEAR PLANNING HORIZON

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### **Preface and Rationale**

SWR Institute is a contractor focused organization that ultimately benefits the entire industry. It's beneficial for contractors to compete against companies who put an emphasis on their workers' safety and training and who are concerned about doing quality work. Manufacturer and associate members benefit from having educated applicators in the field to carry out the work as specified.

The intimate environment at SWR Institute meetings fosters fellowship that benefits all membership groups. Members come to depend on each other's areas of expertise, and they help each other with business opportunities and challenges throughout the year.

The environment at SWR Institute meetings also allows members to feel comfortable sharing their experiences, whether good or bad, with the audience when giving presentations. This free flow of information provides members with invaluable knowledge that would otherwise only be learned through trial and error.

SWR Institute depends heavily on members to give presentations at meetings. Providing presentation skills training and offering presentation opportunities that are less intimidating will help break down barriers for members to commit to speaking at our conferences.

Volunteer engagement is imperative for the success of the Institute and emphasis will need to be placed on getting members involved moving forward. This will require more staff involvement and guidance to ensure that the committee chairs have the support they need to lead the committees and carry out initiatives.

Expanding training opportunities in the industry will continue to be a focus over the next several years. The Institute will capitalize on opportunities to increase education and training.

The industry is seeing a lack of skilled workers, which in part is due to younger individuals choosing not to enter blue collar industries. The Institute will work to increase awareness to younger generations of the industry and the opportunities present.

# SWR Institute Strategic Plan

## Updated June 10, 2019

### VISION

The Sealant, Waterproofing & Restoration Institute (SWR Institute) is the most respected source of knowledge in the sealant, waterproofing and restoration industry.

### MISSION

SWR Institute will be a resource for education and fellowship by providing a collaborative environment for our members and the industry we represent.

### OBJECTIVES 1 - 4

Membership	Brand Awareness	Committee Participation	Training and Education Opportunities
Increase the total membership count to 300 with 60% being comprised of contractors (180 contractors, 60 associates and 60 manufacturers)	Increase the brand awareness and recognition of the Institute	Engage more member participation on committees	Provide training resources for contractor members

### ACTION ITEMS

<ul style="list-style-type: none"> <li>• CM - After the 2019 renewal period determine the number of new members, we need to obtain to reach our goal</li> <li>• CM - Develop a membership marketing campaign targeting the prospective members that includes multiple touches throughout the year</li> <li>• CM - Compile a list of prospective members by asking associates and manufacturers to provide quality contractor referrals</li> <li>• CM - Retain 95% of current contractor members on a year to year basis.</li> </ul>	<ul style="list-style-type: none"> <li>• CM - Populate and Engage with the Brand Awareness Committee</li> <li>• CM - Promote member benefits to current and prospective members</li> <li>• CM - Showcase Institute member resources at meetings and in SWR Institute publications</li> <li>• CM - Reach members through several means of communication and platforms</li> <li>• CM - Demonstrate how the Institute is different from other trade associations/organizations</li> <li>• Review the overall branding and marketing</li> <li>• CM - Add an Instagram account (already have Facebook, LinkedIn and Twitter)</li> </ul>	<ul style="list-style-type: none"> <li>• CM - Schedule committee meetings so that they are easy to attend – change to only two at a time over a three-hour period – evaluate committee member crossover and schedule committee meetings accordingly</li> <li>• CM - Committee Chairs and headquarters work together to plan for effective face-to-face meetings (agendas, list of work tasks, status updates, etc.).</li> <li>• CM - Staff assist with committee chair onboarding and transition</li> <li>• CM - Use Google Docs or some other file sharing software to make collaborating throughout the year easier</li> </ul>	<ul style="list-style-type: none"> <li>• Work with members to host Training Validation Showcases in various parts of the country</li> <li>• CM - Better support and promote the manufacturers with Validated Training Programs</li> <li>• Increase the number of validated training programs</li> <li>• Continue reviewing existing publications and resources</li> <li>• CM - Create a web page that provides links to manufacturer installation videos</li> </ul>
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**OBJECTIVES 5 - 8**

<b>Contractor Involvement</b>	<b>Careers in Our Industry</b>	<b>Sense of Community and Collaboration</b>	<b>Opportunities for Members to Promote their Brand</b>
<p>Increase contractor attendance at both Technical Meetings to 50%</p>	<p>Continue to update website pages where those interested in careers in our industry</p>	<p>Keep members connected and engaged at meetings and throughout the year</p>	<p>Provide opportunities for members to promote their products and services</p>
<b>ACTION ITEMS</b>			
<ul style="list-style-type: none"> <li>• Ensure presentations include a valuable takeaway – the “so what”</li> <li>• Hire paid speakers when needed to add value to the meetings</li> <li>• Balance content to include sealants, waterproofing, restoration, safety and business – also have a well-rounded mix of member types presenting</li> <li>• CM - Maintain the quality of the presentations at Technical Meetings</li> <li>• CM - Get members to update their company’s demographics so the program planning committee can easily reference the types of work our contactor members are performing</li> <li>• Continue to offer Projects on Parade, which is a less-intimidating presentation opportunity for newer presenters</li> <li>• CM - Send solicitation for presenters – promote the \$150 discount on registration fee for speakers</li> <li>• Offer presentation skills’ training for contactors</li> <li>• CM - Determine which contractors are not attending meetings and survey them to find out why they haven’t been attending</li> <li>• Add more 10-minute manufacturer new product presentations, but keep them less technical</li> <li>• CM - Add a way for people who can’t attend the meeting to listen to presentations and see the interaction at networking events</li> </ul>	<ul style="list-style-type: none"> <li>• CM - Add links to trading cards (career opportunity descriptions)</li> <li>• CM - Add testimonials from members letting young people know the opportunities in the SWR industry</li> <li>• CM - Add testimonials from students who have received Foundation scholarships</li> </ul>	<ul style="list-style-type: none"> <li>• CM - Follow up with first timers and ambassadors a couple months after the meeting – copy both so they have each other’s contract info</li> <li>• CM - Remind members of the benefits and resources available through the Institute throughout the year and through various means of electronic and printed communication channels</li> <li>• CM - Contact companies that have not renewed their memberships over the past two years – persuade them to rejoin or find out why they didn’t see the value</li> <li>• CM - Share member company news with other members through social media, Member Briefs and Applicator</li> <li>• CM - Add number of years of membership to meeting name badges</li> <li>• CM - Recognize membership milestones</li> <li>• Rollout of new Discussion Forum</li> </ul>	<ul style="list-style-type: none"> <li>• CM - Rollout Searchable Directory               <ul style="list-style-type: none"> <li>• Get members to populate their profiles</li> <li>• Encourage contractors become Verified Contractors</li> <li>• Promote the directory as a place to find quality companies</li> </ul> </li> <li>• CM - Trinity Awards and Award of Excellence               <ul style="list-style-type: none"> <li>• Promote winners to membership and to the industry at large</li> <li>• Offer article and presentation opportunities for winners</li> </ul> </li> </ul>

## Color Coding

- CM at the beginning of the bullet point indicates the responsibility falls on the Crane Martin staff
- Red font means the action item has been done
- Blue font means we've started doing the item, but it's an ongoing issue
- Gray font means that the item was nixed after the Strategic Plan was developed