



Strategic Plan Update Summary (2/2019)

The original strategic plan was prepared in 2011, with some additional tasks added through 2013. The Strategic Planning Committee has revisited that strategic plan and established that many of the tasks identified have been completed, but more work is needed in order to achieve the objectives set forth in the plan.

The Strategic Planning Committee is in the process of updating that plan, but here is a brief overview of things that have been accomplished (green) and just some of what we're working on now (yellow) and in the future. The tasks are broken down according to the overall objectives established in the original plan.

Increase organizational effectiveness

- ☐ Hired staff to take the load off of volunteers
- ☐ Aligned the chapters with regions
- ☐ Launched regional focus events
- ☐ Adopted the use of a robust member management software (note: stay tuned for new developments)

New tasks as of 2018-2019:

- ☐ Evaluate/Search/Hire Association Mgmt Co
- ☐ Evaluate/adjust committee structure factoring in automation and outsourcing
- ☐ Assess previous strategic plan & identify new targets
- ☐ Reduce workload on volunteers and paid staff, and make things easier for members by streamlining onboarding, joining, renewals, expense submissions
- ☐ Move to paperless operations as much as possible
- ☐ Implement a chapter waitlist
- ☐ Offer members the option to auto-renew dues
- ☐ Create/implement official process to assist new/small chapters build their chapter
- ☐ Build connections between committees to more effectively plan and implement new features

Increase Member Satisfaction/Value of Membership

- ☐ Started a Table Topic library
- ☐ Developed a chapter audit process
- ☐ Clarify/communicate membership expectations
- ☐ Started an annual survey of membership

New tasks as of 2018-2019:

- ☐ Design a comprehensive member experience enhancing member value at each stage
- ☐ Greatly expand the educational resources in the form of webinars, articles, table topics, benchmarking tools, case studies, organized by topic and by member status (start up, owner, direct sales, employee, etc)
- ☐ Maximize the SEO benefit to members' websites when featured on social or they write articles
- ☐ Feature new members on social media
- ☐ Implement new tech tools to help members grow their network and refer each other
- ☐ Continue to survey membership annually
- ☐ Recruit dynamic speakers for larger live events
- ☐ Formalize a new member mentoring program
- ☐ Tech tools to increase our ability to help our charity projects

Tasks accomplished Tasks in progress

Improve Communications/Marketing

- ☐ Created a new logo
- ☐ Established remote access for chapter rep and board meetings
- ☐ Developed external marketing materials
- ☐ Created a youtube channel

New tasks as of 2018-2019:

- ☐ Responsive Mobile App
- ☐ Improve website features such as chapter & member locator map (and more)
- ☐ Greatly improve member area on website to make information easier to access
- ☐ Incorporate more video/live where appropriate
- ☐ Improve website as a marketing tool
- ☐ Improve ability for members to promote themselves and connect with each other
- ☐ Update photography on website
- ☐ Create more robust social media strategy
- ☐ Flesh out youtube channel with useful content
- ☐ Acknowledge & engage younger demographic in a meaningful way
- ☐ Consider development of WBN swag items