



Findings from the executive breakout sessions

Prepared by



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Breakout sessions: Group 1

Participants

Kristie Michael, Construction Exchange of Buffalo and Western New York
Christine Prymack, Windsor Construction Association
Rebekah Morris, Arizona Builder's Exchange
Amy Harper, Builders Exchange of Wisconsin
Alison Smith, Barrie Construction Association
Lori Klopfenstein, Salem Contractors Exchange
Matthew Farthing, Construction Association Network of Saskatchewan

The question

The 2016 BX Net Survey indicates that 50 percent of members offer pre-bid project information as a service. This executive breakout session is intended for the BXs that do provide pre-bid to compile a quick check list for the non-providers on lessons learned on how to overcome the hurdle and initiate and maintain a quality pre-bid project information service.

The discussion

It's important to split your public- and private-sector leads.

Start with the public sector. Look at municipalities' five-year construction plans. Dig deep. Decisions are often made at the sub-committee levels. Review agendas and minutes.

In terms of workflow, separate new publishing from updates. These should be treated differently, and involve different conversations with different sources and different personality types. Be mindful about job responsibilities.

The person that hunts leads requires a very different set of skills from the one that maintains the projects once they're in the database.

Build relationships through your own sources, such as magazines, newspapers and videos. Promote people who want their projects known.

People are most responsive to regular, in-person follow-up meetings (especially consultants). Don't bother people unless absolutely necessary.

Communicate directly with owners as much as possible. Know what you need to ask them. Be as to-the-point and effective as possible. The owner is a verified source. If you get information from anyone else, cross-check. You can't be sure otherwise.

Tie project updates to milestones, ideally ones that are in parallel with the planning process, such as zoning decisions, changes in ownership, and design review milestones. Determine as early as possible how and when the owner will decide on the prime contractor.

Check back on dates, especially when designers and other project team members are selected.

Link your reporters' notes to timelines and milestones. Write everything down. Input it into a calendar. No mental inventory!

Use pre-bid as a leads generator for active projects.

Your goal should be to turn 65 percent of your pre-bid leads into active within 24 to 36 months.

Minimize interruptions. With pre-bid workflow, make your calls for updates as efficient as possible. When a major public buyer, such as Arizona DOT, has several projects in the pre-bid stage, make a call. Ask for an hour of their time and go through each detail one by one to confirm and update. Don't make a series of calls!

Lastly, freebies! Architects and consultants are incredibly responsive to freebies. Invite them to events. Bring them lunches. Ask them for updates on what they're doing by offering to share what their competitors are up to.

Breakout sessions: Group 2

Participants

Donna Richter, Southern Illinois Builders Association
Sue Ramsay, Hamilton-Halton Construction Association
Kay Evans, Salem Contractors Exchange
Bryony Buchanan, Barrie Construction Association
Luke Hudson, Billings Builders Exchange

The question

Effective recruitment and retention of members is a priority for each of us. This breakout will focus on identifying best practices among BXs/associations such as identifying and maintaining a prospect list, pursuit strategies, having a dedicated sales person or not, membership tracking programs in the market, best practices for new member on-boarding and when to follow-up, and ultimately the exit interview.

The discussion

Get your members to spread the good word about your organization. They are your champions and word-of-mouth recommendations are always most effective.

Work through licensing government agencies. In Oregon, for example, they have an organization that governs all the contractors. They give licensing classes. Getting the names of the people taking those classes tells you which are your members-to-be.

By the same token, everyone has a business license. If you're able to monitor those, you may be able to tell which are contractors. Dig deeper by finding out what their business classification is through SIB codes.

Offer free trial memberships. These could be as short as five days or as long as two weeks. Give them a freebie to get them hooked!

Contact your members often to support retention efforts. This is especially important for new members. Reach out to them quarterly. Offer orientation sessions.

Make sure your new members are welcomed and known to the rest of the group. Make them feel welcomed and help them build the connections they're looking for!

Breakout sessions: Group 3

Participants

Earl Hall, Syracuse Builders Exchange
Tom Getzke, Minnesota Builders Exchange
Brad Walters, Associated Building Contractors of the Triple Cities
Todd Helfrich, Eastern Contractors Association
Rex Klein, Barryhund Associates

The question

We all know that sourcing private jobs is a challenge, but many of us are seeing public-sector project sourcing barriers crop up as public procurement practices change across North America. Some buyers are moving away from open project advertisement. This breakout is intended to be a discussion of what changes are happening and the challenges and solutions that BXs are coming up with to acquire bid opportunities with full project plans and specs.

The discussion

The exchanges in upstate New York work collaboratively to collect and share plan room projects and information. The exercise was a function of how to increase number of projects in each exchange. They have established goals to bring in more projects and increase value to members.

One of the best ways to find public- and private-sector projects is to scour the list of municipal building permits. These can generate leads.

No matter where you're looking, the reputation of your BX is critical. Make those one-on-one contacts with the purchasers/plan holders. Yes, this can be time-consuming and expensive, but it's critical when making those asks for plans, especially on the private side.

Collaborate. Team up and share data so buyers can send their data to just one source.

Consider freebies and thank-you gifts. Buy projects if you have to.

Take the legislative route. Quest, which is a company that originated in Minnesota, distributes plans for a price across the USA. In New York, it has contracts with government departments to be the sole plan issuer. Our lobby efforts should be aimed at forcing private plan listers like these that hold public data to get out of the market, or share data with BXs.

Use peer pressure. Get own members to turn the screws on private and public plan providers to get the projects flowing to your BX.

Breakout sessions: Group 4

Participants

Martha George, Grand Valley Construction Association
Elizabeth Bovard, Builders Exchange of Michigan
Krista Smith, Great Falls Builders Exchange
Brenda Romano, Virtual Builders Exchange
Scott Howard, Tri-City Construction Council

The question

What advice would you give to your successor? What did you wish your predecessor had told you about this job?

The discussion

Start by building a best practice document for every position in your organization—not just you, but also your staff. You have to understand all the positions. Know the workflow of who does what and how. Your best practice guide should include *everything*—even the most seemingly basic items like passwords.

Don't be afraid to change things. Don't always fall back on the "we've always done it that way" mentality. Challenge conventions.

Come to your board with high-level asks on strategies and for assistance with problem solving, but steer them away from the minutia. Disarm this question by reminding them that the day-to-day business is operational. That's what you were hired to resolve. Or simply ask the board as a group, "is anyone else interested in discussing this right now?"

Know your product. Understand it in and out, and speak the language. You need to eat that kind of information for breakfast.

Delegate. It's OK to let go of some things. Don't be afraid.

Define who you are, what your goals are and what your strengths are. If you don't, someone else will.

Get a beer fridge or a good coffee machine. Make the staff and the members comfortable. Remind your staff to treat every member that walks in the door like gold. Think of each of them as a week's paycheck!

Breakout sessions: Group 5

Participants

Ron Hambley, Winnipeg Construction Association
Tracy Page, Mohawk Valley Builders Exchange
Lynn Stetson, BX of Kentucky
Rita Heldenbrand, Spokane Regional Plan Center

The question

Competition for each of us can come in different forms from the major national data firms such as Dodge, CMD Construction Connect, iSqFt to even another builder's exchange or association. At times, some of us have formed strategic partnerships with a competitor so the story is not always a general statement of 'us versus them'. This executive breakout will be an intelligence sharing discussion of what the current experience is and developments happening across the continent.

The discussion

Reprographics houses are a source of competition for many of us. Their businesses are suffering, and they have identified our members as potential sources of revenues for document distribution. The challenge for us is that they have the time and resources to sign up counties and municipalities to their services. What's more, they generally disallow access to plan centers. We have to pay for the products they distribute.

Paying for projects is something that none of us might have considered 10 years ago, but it's something we're doing now.

For some of us, our largest competitors are GCs. They use Dropbox or any kind of FTP site to share private-sector work. They invite their favorite trades to come and look at plans. It's hard for us to crack into those markets and share data more openly.

We can combat that trend with a decent pre-bid service. Let's get our hands on the plans before the GC does!

Dodge and Reed and other large competitors take the shotgun approach to marketing their services. Some local construction associations in Canada are selling post-bid data to these guys. They take a lot of benefit from counting the doorknobs on a project and selling that information back to manufacturers. That information is a great asset to those guys, and it's a revenue generator for us. Especially since that kind of information is not something we have the time or the resources to use in the same way.

Breakout sessions: Group 6

Participants

Phil Reed, Northern New York Builders' Exchange
Joe Benedict, Construction Exchange of Buffalo and Western New York
John Mollenhauer, Toronto Construction Association
Stacy Sleeper, BX of Central Ohio
Gunner Webb, Spokane Regional Plan Center

The question

This executive breakout session is intended to be a bit of a crystal-ball gazing exercise to gather insights from executives as to what they see their key services and overall value proposition will be of their organization in 5 to 10 years.

The discussion

Networking

It is increasingly difficult to get members to pay for networking. Everyone knows that it is important, and it will look very different in 10 years than it does today. We have to change to suit what the younger crowds want to do. Very rarely can we sell a membership based on our networking events, but it's an important thing to have. Perhaps the solution is to create more speed-dating types of events that cater to younger audiences.

John McNicoll from the Edmonton Construction Association said that his group is trying to create networking events that are much more specific to particular business connections. For example, it holds a "meet the GCs event" where several general contractors introduce themselves for two minutes to talk about a few projects they have on the go. Attendees are then invited to mingle with each GC to make connections and learn about work underway.

Another member suggested that their exchange hosts a speed-networking event for young professionals that attracts close to 100 people.

The key take-away: know your audience and tailor events to their needs. Understand the role that technology can play in this.

Effective communications

There is such an abundance of information available to members. The exchanges and associations that are successful in their marketing efforts find the ways of differentiating themselves with their communications. Don't shotgun out information to members. Be relevant and targeted to be successful.

Investments in membership databases

A good database is the backbone of the association or builder exchange. Track data and use it to understand who wants what from your organization.

It is very hard to personalize relationships when members are spread out over a wide territory, and it's impossible to have relations with everyone if you have more than 200 members. We need to find ways of knowing as much as possible about members without having coffee with them every day. A good database that records data about the plans they view, the events they attend, etc. can help us target our marketing and retention efforts. Make it easy for members to make that renewal decision!

Software as a service

So much data in our systems is being wasted. What intelligence can we use and what can we sell to other organizations? (Such as those members selling post-bid information to other groups.)

Treat our members like partners

Ask for feedback. It's their association. Get them involved and participating!

Consolidation

Is this a future trend? There are so many associations out there. Margins are only getting slimmer, and time is at a premium. Maybe it's time for associations and exchanges in nearby regions to share resources such as bookkeepers.

Breakout sessions: Group 7

Participants

Don O'Connor, Duluth Builders Exchange
Michael Roy, Ottawa Construction Association
John DeVries, Ottawa Construction Association
Tim Conway, Omaha Builders Exchange
Laura Regan, Eastern Contractors Association

The question

This executive breakout session is intended to be a group discussion of practical management issues facing all of us from effective new pieces of technology (software or hardware) your exchange is using, implementing a new database or event management system, what are best websites and means of recruiting, how are you communicating with your members, social media.

The discussion

Recruiting staff

Traditional methods such as placing ads in newspapers are ineffective. You might as well light your money on fire.

Websites such as Indeed are more effective, and you can pay money to boost a post

Monster and other job sites are huge, but not localized. (Monster fees!) They are good for national recruiting. Local websites also exist, and are cheaper than newspaper ads.

Temp-to-hire services will vet people and verify information by doing, for example, background checks. They handle all the paperwork and help you sift through all the resumes that are obviously not appropriate. The fees for such services are comparatively high, but ask yourself, "how valuable is your time?"

With these services, you have the flexibility to send the person back if he or she is not a good fit, and you don't have to call the employee personal to dismiss them!

Best used to fill administrative positions.

Headhunters tend to be more effective for senior-level position. The fees they charge are higher still, but can be negotiated.

Eastern Contractors Association has a college student in its office who works part-time. He does data entry and enters the spec books. The trade-off is that he needs a flexible schedule to accommodate classes and exams. High-school students is another route members may wish to consider.

Communications with members

Email is the principal tool many members use to communicate with their members. The question is, do you send out emails using Outlook or another mail client, or do you use an outside software package such as MailChimp or Constant Contact? The answer is, do what you're comfortable with, but understand that Outlook and others like it don't allow you to track clicks. MailChimp and Constant Contact do. Those services will also ensure your emails follow your legal spam obligations.

Other forms of communications to members include faxes, sending freebies (such as fridge magnets) in the mail, and social media (but this requires significant planning and input time). If a member unsubscribes from an email, be sure to follow up with a phone call. Ask why. There may be deeper issues in play.

Database and software

Increasingly, associations/exchanges are moving to a software-as-a-service model. Be mindful that while these providers own the software you use, the data they carry must be owned by your organization only.