



Putting the **EXCHANGE**  
**back in the Exchange**

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## MESSAGE FROM THE PRESIDENT



# Re-engaging with our members

It occurs to me that this year is already half over and I'm still mentally somewhere in mid-January—of 2017. Wow. Time flies. I look up from my computer screen just in time to realize that another quarter has blown by.

In the middle of all this “busy-ness,” it's easy to get disconnected. We get disconnected from our family, from each other, from our mission and increasingly disconnected from our members.

Technology is a great tool, and without a doubt we can perform more tasks in less time than ever before, but we've all paid a price for that efficiency. Most of us interact more with our devices each day than we do with the people around us. To appease the technology task masters we now serve, we fortress ourselves behind email, voice mail and abbreviated text messages. Our members have done the same.

While we bemoan the loss of connection with our members, it's important to remember their days look exactly like ours. Like us, they have too much to do, too little time to do it and too much keyboard clacking to get it done. So, how do we reengage and reconnect?

We tried an experiment recently that yielded results worth sharing. We contacted our heaviest plan room users and shamelessly bribed them to spend two hours with us. We gave each participant that agreed to show up and give us their candid opinion of our services a fresh \$100-bill for their trouble.

We had a waiting list of people who wanted to participate—proof that capitalism is alive and well in our industry. What came out of those discussions was invaluable insight into their world and how we fit into it—or, in some cases, no longer do. The more interesting aspect though was how long most members lingered in our office past the two-hour deadline, drinking coffee, pondering the future of our industry and just generally enjoying some freewheeling discussion with us and with their peers.

In between giving us a list of what they like and what they wish we had, there was lots of discussion about how much they missed having time for these kinds of face-to-face conversations. Clearly, technology is a cunning thief that has stolen valuable time from all of us while promising to give us even more of it.

Since that meeting, it's been interesting to note how many of those members have emailed us with funny comments, added suggestions, project leads or just to say “hi”. The big question on our end is how we keep that momentum going without paying our members for their precious time and attention. We don't have answers yet, but we are asking better questions. That's progress.

A good start is to practice what we preach. Make sure you book time to attend the BXNet meeting in Sonoma next February so you can talk to your fellow members. Meanwhile, drag yourself away from your devices and carve out time to print and read BXNews. I had not seen the content for this issue before writing most of the above, so I think it was serendipitous that there are at least three articles, *Putting the Exchange back in the Exchange*, *Servant Leadership* and *The Rewards of Being Pleasant to Your Customers* that tackle different aspects of the same theme. Ponder their messages and then use our new BXNet Slack tool to connect with your fellow members about their approach to these topics.

Finally, chuck your devices completely and spend some time with your family and friends enjoying the all-to-brief summer. The winter snow may be flying again the next time you look up from your screen.

A handwritten signature in black ink, which appears to read "Brenda Romano".



# A busy summer ahead



The big news coming out of the BXNet offices is that we've confirmed our venue and dates for the 2019 annual convention. We're going to California.

Our destination of choice—and the one that offered the best value for our member dollars—is the famed Fairmont Sonoma Mission Inn & Spa in Sonoma Valley, the heart of Wine Country. Our main convention activities will run on February 13 and 14, and we'll host a welcome reception on the evening of February 12.



For more details on the conference and our venue, see the article on page 4.

As you know, BXnet is a budget-conscious organization that depends on the generous support of our members to successfully execute conferences such as these. We hope to secure one main sponsor and several supporting sponsors for next year's event. If your exchange would like to sponsor our 2019 conference, please let us know.

The other piece of news you'll be interested to know about is a session Angela and I are developing on marketing for membership. Marketing was one of the themes that members asked to hear about at our convention in San Antonio this winter. We delivered a half-day of sessions on the subject that I hope informed and inspired. Angela and I will expand on those ideas, and deliver more, in a session in November.

Marketing isn't easy. We'd like to help you do more of it, and do it better so that your members understand the value they get for belonging to your exchange.



Watch for details on that program soon.

Speaking of communications, watch for a new BXNet member survey to be distributed this fall. We conducted our last survey of members in 2017, and we've heard from a handful of members that it's time to refresh the data. We'll do that this fall with a view to presenting our findings to the membership during our annual convention next February.



One more thing on our agenda: dues-renewals. By now, you will have received your annual dues renewals letters by email. Our membership rates for 2018–19 are unchanged at \$750 USD, and we hope that the PayPal option we're presenting is easy and convenient for you. The deadline to remit is July 15.

Finally, we'd like to say thanks to Paul Haveles, executive director at the Builders & Contractors Exchange of Virginia, for sharing his experiences on his first year on the job at BCEVA for our article on page 6. We love to share members' ideas and experiences in the pages of this newsletter.

As always, if you have any issues you'd like to discuss with us, or any story ideas you'd like to contribute to the next issue of the BXNet news, please reach out.

## HAPPY SUMMER!



# Announcing the 2019 BXNet Annual Convention



## ***We're going to California!***

BXNet is pleased to announce that our 2019 Annual Convention will be held at the Fairmont Sonoma Inn and Spa in Sonoma, California from February 12 to 14, 2019.

Plans are underway for our convention program—and input from members is always welcome—but the tone and information presented will build on the materials and successes we enjoyed at this year's convention in San Antonio. We'll have sessions on exchange management and plan room logistics, as well as other issues that affect your organization and its members every day.

Underpinning all of this, of course, will be countless valuable opportunities to network with your peers from exchanges, local construction associations and plan rooms across the United States and Canada.

Stay tuned.

## **Our hosts**

Our host venue for the conference will be the beautiful Fairmont Sonoma Inn and Spa.

Nestled in the heart of the famed Sonoma Valley, the venue is hailed as California Wine Country's finest destination resort. It offers exceptional spa services, a Michelin-rated restaurant, access to championship golf at neighboring Sonoma Golf Club and numerous







complimentary fitness and wellness offerings—guided hikes, yoga and fitness classes. Located just an hour north of San Francisco, the resort has been catering to discerning travelers for decades.

BXNet has secured a block of rooms for just \$199 USD per night, and complementary access for delegates and their spouses to the award-winning Willow Stream Spa, which features four geo-thermal swimming pools, a 24-hour fitness center, and fitness and wellness classes.

For those guests that wish to extend their stays, our room block is available from Monday, February 11 through Friday, February 15.

Learn more about our venue at [www.fairmont.com/sonoma](http://www.fairmont.com/sonoma).



## Registration and sponsorships opening soon

Watch for program details and registration information in the months ahead—as well as a few surprises that will surely capture your imagination.

### Join us!

Book February 12 to 14, 2019 in your calendar and plan to attend the 2019 Builders Exchange Network annual convention.

See you there!



# Are you a golfer?

As part of our arrangement with the Fairmont Sonoma Mission Inn & Spa, BXNet conference delegates receive exclusive access to the Private Golf Course at Sonoma Golf Club. The club offers a world-class golf course experience, practice facility, bar/restaurant/ patio, bocce courts and tennis courts. Transportation to and from the course is provided complements of the Fairmont as well.

See more of the course and its facilities at [www.sonomagolfclub.com](http://www.sonomagolfclub.com).





# Putting the **EXCHANGE** back in the Exchange



*How a new director's vision revived his exchange.*

Sometimes it takes a fresh perspective to breathe new life into an established organization.

That was certainly the case for the Builders & Contractors Exchange of Virginia (BCEVA) when it hired executive director Paul Haveles last summer. Membership numbers were declining and the exchange was losing touch with its core base. New ideas were needed.

"When I interviewed with the board, they directed me to bring in more members," he recalls. "I told them I wasn't going to do that. I said my approach would be to spend at least my first year on the job improving relations with the base of members that we have, demonstrating to them what we do for them, and addressing their concerns."

That frank talk might have surprised the members of the BCEVA board, but Paul pulls no punches. He served for 30 years as a full colonel in the United States Army. Paul talks direct and he acts with purpose.

As it turns out, Paul's approach has proven successful. Since he joined BCEVA, he's put forward a concerted effort to understand what his members want and need, and he's taken steps to make those wishes a top priority for the exchange.

"The biggest challenge for me last year was coming into an organization that has been around for so long [BCEVA was founded in 1908], and which was still doing business the way it always had been done," he says. "I had to balance the need to respect those structures, while putting meaningful changes into action gradually, so as not to risk collapsing the whole organization. It took time."

## **Putting exchange back in the exchange**

Paul changed BCEVA by going back to first principles. A chance review of the exchange's articles of incorporation reminded him and his board that the exchange was originally founded as a social club. It was a place where contractors could meet for social purposes and to forge relationships. In that moment, it was clear to him that element was missing from his exchange.

"Members don't come into our offices anymore," he says. "Exchanges have lost most of the direct and meaningful interactions they used to have with their members. Historically, the exchange was a place that contractors visited to speak with staff and meet with other builders. Those factors made membership in exchanges essential—and it helped the exchanges thrive. That's just not the case for many exchanges any longer."



Paul Haveles

Inspired, Paul set about a determined campaign to not only be more visible in front of his members, but also create forums for members to meet one another. That initiative began with an increase in the number of social events hosted by BCEVA. But even an idea as simple as that proved challenging. BCEVA's territory is separated into two distinct regions that are joined by bridges and tunnels. Generally, those contractors that work on the south side of the territory don't cross over into the area known locally as the peninsula. And vice-versa. ("It might as well be the Great Wall of China," Paul jokes.)

Historically, BCEVA events have been hosted on the south side. The peninsula got little attention. Until now. The exchange's first social event on the peninsula drew nearly 70 people; the next 54. Paul was told he'd be lucky to bring in 20 to either. What's more, the events proved that BCEVA members will travel. Several south-side members made the journey to the peninsula events.

Paul didn't stop there. He launched several various health-and-safety training programs for the members—on must-have certifications such as CPR, first aid, OSHA and silicate competent person training. He recently added another program on blueprint reading. In the first five months of 2018, 300 employees from 99 member firms came to the BCEVA offices for training—which, by the way, the exchange offers on a cost-recovery basis.

### Little gestures add up

Paul makes a point of introducing every training session himself. He spends just five minutes off the top introducing himself and the instructor. He does the same at BCEVA social events. It's a small gesture, but it very much reminds his dues-payers that he's an engaged and active manager, someone they can speak to when they need to.

The move is paying dividends. BCEVA brought in four new members in the past two months because of its expanded training offering.

For those members more technologically inclined, BCEVA has boosted its online footprint, too. It launched a new webpage and plays more active roles on social streams such as Facebook and LinkedIn. (Paul checks both social feeds daily and makes a point of congratulating any member on any anniversaries they're celebrating or milestones they've achieved).

"I know members appreciate the work we're doing by being more visible and accessible to them," he says. "We're reminding people that the exchange is there for its members, and not the other way around."

### Upgrading the plan room software

One of the biggest hurdles Paul had to clear in his first year on the job, and one of the initiatives he saved for last, was to upgrade the exchange's plan room software. Until this past Memorial Day, BCEVA staff and members were using a 1993 DOS-based operating system known as CNIS. Paul shopped around and landed on a solution that he judged to be of best value for the members. That was step one. Step two was the launch.

"It was difficult," he admits. "My members knew and trusted the old system. My staff did too. A lot of people didn't want to learn a new way of doing things. They had been using the system for 25 years! We got some push back."

Now that the tool has been in place for a couple of months, most of the growing pains seem to have passed. Members and staff now see that there is so much more they can do with the new technology—better searches and deeper analytical tools, for example. Yes, it took some time to navigate the new system, but Paul's been helping out by offering free lunch-and-learn sessions for the members to make the transition easier.

You might think that a former colonel who served for 30 years in the United States Army would be a strange choice to lead a builders exchange. It's proven anything but. Paul's planning skills, desire to create and execute on a mission, and laser-sharp focus have helped breathe new life into BCEVA and bring new members into the fold.

### Building on successes

Going forward, Paul still has work to do. He wants to get back the BCEVA members that have been lost over the years. He also wants to expand the exchange's social and training programs so that they're spread out geographically—on the south side and in the peninsula—and easier for members to reach.

"One of the biggest things I took away from the BXNet conference in San Antonio last winter was that other exchanges are dealing with problems—like connecting with members," he says. "I was happy to discuss ideas with them, and put those changes into place at my office."

Interpersonal relationships make the exchange, and that's surely something none of us should lose sight of.



# Competitor Watch

*Issue to issue, we're keeping tabs on the latest news and information on what the major providers of construction bid opportunities are up to. We provide this information without bias. BXNet neither endorses nor opposes such activities. We merely present them so our members may stay current on the activities of organizations that some may consider to be competitors*

*Check this page regularly, and send us tips if you see something of interest: [info@bx-net.org](mailto:info@bx-net.org).*



## **ConstructConnect Combines iSqFt and SmartBid as Important Step in Mission to Transform the Construction Industry**

ConstructConnect, a leading provider of construction information, technology solutions and the developer of the iSqFt platform, announced on May 24 that it has acquired SmartBid from JBKnowledge.

SmartBid, a leading construction bid management solution for general contractors that streamlines subcontractor management and prequalification workflows, is one of three significant investments – including QuoteSoft and PlanSwift – recently made by ConstructConnect.

ConstructConnect has combined iSqFt and SmartBid to enable their collective customers to make the connections necessary to build and strengthen relationships, leverage project data and analytics to make better decisions while using more effective software to deliver projects more profitably.

“We recognize general contractors need access to as many capable subcontractors as possible in the markets they serve to be positioned for success,” said Dave Conway, President and CEO, ConstructConnect. “The combination of these businesses will provide our

customers access to many more subcontractors who have the capacity to complete their projects.”

“Bringing together iSqFt and SmartBid is great news for our GCs and Subs,” said James Benham, CEO of JBKnowledge. “Our General Contractors will have access to a significantly larger pool of active subcontractors as they reach into newer markets and our subcontractors will have more opportunities on which to bid.”

ConstructConnect will continue to support and improve both iSqFt and SmartBid going forward. JBKnowledge will continue to offer industry related services and will remain headquartered in Bryan/College Station, Texas.

“James and his entire team have worked hard to provide their customers with solutions that meet their preconstruction needs,” explained Conway. “Bringing these two leading bid management solutions together is an important step in our own transformation as we deliver our next generation platform that will combine our market leadership with new best-in-class software.”

He concluded, “We are moving toward a more personalized user experience that’s powered by access to more data, more connections and more tools in one place than ever before.”



## ConstructConnect Continues to Expand Product Portfolio with Acquisition of PlanSwift LLC

ConstructConnect, a leading provider of construction information and technology solutions in North America, announced in April that it has acquired the assets of PlanSwift Software LLC (PlanSwift), a privately-held software company located in Bountiful, Utah. PlanSwift is a leading provider of construction takeoff software.

"Combining with PlanSwift is in line with our commitment to simplify and improve the pre-construction process. Our customer feedback continues to clarify our need to invest in streamlining their ability to build stronger relationships, select the right projects and succeed through timely and accurate estimates," said Dave Conway, CEO of ConstructConnect.

"The importance of effective preconstruction continues to rise as market conditions require expert project delivery with the added challenges resulting from shortages in skilled labor," explained Conway. "Our network, project data and software enable our customers to overcome these challenges and achieve superior results.

PlanSwift's 11-year rise to a construction industry leader in takeoff software can be attributed to its humble beginnings as a company aligned to its customers. Much like ConstructConnect, PlanSwift focuses on customer needs and continuous product improvement.

"Since the beginning, it has been our mission to offer the highest quality products to our customers," said Jeff Jensen, president of PlanSwift. "Now, as a part of the ConstructConnect family, we cannot wait to show them what happens when we innovate together."

PlanSwift is the latest takeoff and estimating solution provider to join ConstructConnect along with On Center Software and Quote Software. The company continues to invest in the seamless integration of its expanded product portfolio giving customers a highly effective and more efficient user experience.

"ConstructConnect has deployed Design Thinking and Lean UI/UX principles to ensure the Voice of the Customer will influence design and functional relevance as products are integrated and continually improved," explained Jen Johnson, CXO, of ConstructConnect. "As our product suite grows we will be offering our customers access to innovative applications designed to meet their individual needs based upon trade, size, location and preconstruction practices."

# Are you slack ing?

The BXNet Slack forum is open to all users!

Slack is the tool we're now using to sustain member-to-member interactions during the months between our conferences and events. It's an instant-messaging forum that's free and easy to use. Information is sorted by channels and users can connect directly with one another over private channels or share ideas and ask questions over open-access channels on subjects such as plan rooms, human resources, technology and conferences.



To date, a handful of members have signed on. Are you one? If not, send us an email at [info@bx-net.org](mailto:info@bx-net.org) and we'll bring you into the discussion.

If you'd like to learn more about Slack, check out [slack.com](http://slack.com).

## The Slack question of the month

As part of our efforts to generate even more discussions on the BXNet Slack forum, we're asking questions of the month.

This month, we've taken inspiration from an article on the work being done by BCEVA to engage in new ways with its members. The question, then:

Have exchanges lost sight of their core purpose (i.e., to engage with members)? Why? How? And what can they do to bring back those meaningful interactions with staff and other contractors to make their offices and their events as useful and valuable to members as possible?

Log on to the BXNet Slack forum today to discuss!

# Servant leadership





Have you ever heard of the theory of servant leadership? It sounds like a contradiction—the leader serving the followers—but it is actually much more than that. It is a growing practice that is used by successful companies all over the world: Starbucks, Southwest Airlines, Men's Warehouse and many more. It is a theory that could easily apply to builders exchanges no matter their location, size or services offered. In fact, if builders exchanges are to survive and thrive in the coming decades, they must be led by individuals who have a strong sense of both the daily operations as well as the vision and leadership skills to create organizations of lasting impact for the commercial construction industry.

Robert Greenleaf, the pioneer of servant leadership spent most of his career in leadership roles at AT&T. It wasn't until his retirement that he went on to publish an essay, "The Servant as Leader" in 1970 and became widely known for his ideas. Since then, servant leadership has been researched, taught and practiced in small organizations, large companies, universities and more. Greenleaf came up with the following test to determine if someone is a servant leader. "The best test, and most difficult to administer is: Do those served grow as persons? Do they, while being served, become healthier, wiser, freer, more autonomous, more likely themselves to become servants? And, what is the effect on the least privileged in society? Will they benefit or at least not be further deprived?"

The characteristics and measurements of servant leadership may seem abstract but, in fact, they are easily distinguishable and can be articulated by employers and employees alike. Larry Spears, a writer and well-respected researcher in this field, concludes that the following characterizes are what define a servant leader: listening, empathy, healing, awareness, persuasion, conceptualization, foresight, stewardship, commitment to the growth of others, and building community. There are additional characteristics in a wide variety of research articles. I would also add accountability/results, self-care and equality.

Conceptualization is the "ability to create a future-oriented concept that provides vision and mission." This is one of the differences between a manager and a leader. A leader inspires others. A leader has the ability to create and help others see the bigger picture and mission of an individual's work as well as the organization's work in the context of the community and world. It's the difference between the belief that the data entry employee is simply entering data versus being part of the mission to help members grow their businesses by easily finding projects and saving time and money with everything organized in one place.

One of the most important qualities in any leader is the ability to listen, which is markedly different from hearing. In smaller settings, listening is a more engaging experience whereby one has zero distractions, is not forming questions

or allowing his or her mind to wander but focuses entirely on the speaker. It is a great way to show respect. In larger settings, such as an entire organization, the leader forms initiatives and studies, and engages in conversations that help him or her understand what the employees, customers and all stakeholders need and value. If a leader can listen, this one quality will significantly elevate his or her success toward achieving the mission and vision of the organization.

The other quality that is important for effective servant leaders is the ability to hold themselves and others accountable in terms of morals, work ethic and results. Just because a leader can empathize or demonstrate care, it does not mean there are low or no standards. Servant leaders are actually called to have the highest of standards—it's the ethical thing to do for the organization. Customers, members, employees and the greater community all rely on the results of the organization. Without clear standards and accountability for meeting those standards, the product, customer service experience, or overall health of the organization is in jeopardy.

The last quality that will be defined in this article is self-care. Although not as extensively studied in leadership research, I believe it will be the next significant area of exploration. According to Mayo Clinic, CEOs average 24 percent less sleep than the average worker, work 23 percent more hours per day, travel an average of four more days per month (which accelerates aging and increases disease exposure) and lead sedentary lifestyles resulting in greater rates of obesity. Executive leaders are at greater risk for heart disease, depression, stroke, diabetes and more. They must learn to practice self-care methods that enhance their overall wellbeing if they expect to be effective in their roles. Watch for an article in the next newsletter detailing how leaders can practice self-care.

Overall, servant leadership is one model that can be applied to builders exchanges as we continue to serve the commercial construction industry across North America. Most importantly, servant leadership is effective. Leaders who practice this achieve results, transform and grow organizations, and improve the lives of employees and stakeholders.

Feel free to reach out to me with questions or comments. I welcome your feedback.

*This article was written by Ashley Skoczynski, executive director of the La Crosse Builders Exchange in La Crosse, WI.*

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# The rewards of being pleasant to your customers



I notice outstanding customer service for personal and professional reasons. For instance, every time I go to a Cici's Pizza, the employees greet customers as they enter the store. They've been doing this for years.

So imagine how I felt on my last trip to Home Depot. I had to make a quick trip to return an item and was in a rush to do several other errands. I stood alone at the Returns counter for over 10 minutes. During that time, five different associates glared at me with that, "Get off my lawn" look.

Finally, an associate worked some magic on me. She mumbled, "I'll be with you in a moment." This was a good trick, since she managed to do it without ever making eye contact with me. In the meantime, more associates came to the Returns area and left. Each in turn stared at me without saying a word or even acknowledging my presence.

One thing was clear: I was in a hurry; they were not.

Five minutes later, another associate walked over and reluctantly assisted me. I was still the only customer at the counter.

There's nothing like observing four people watch another person working. But that is the state of service with many Home Depots and other companies.

## **Come back, Bernie!**

Bernie Marcus and Arthur Blank founded Home Depot in Atlanta, Georgia in 1978 on a shoe-string budget. The two gentlemen revolutionized the home improvement business by using a warehouse concept. Their goal was to provide assistance to people who wanted to do home improvement projects and needed supplies, equipment and professional assistance.

Marcus was a master at customer service training. He told the employees to assist everyone and escort them to the items they were seeking. He even threatened to bite off the finger of anyone who only pointed to another part of the store rather than taking them there personally. When he and Blank retired, they had made personal fortunes and left the corporation in great shape... but it didn't last, and corporate fortunes changed under different leadership.

Home Depot is now known for not helping customers. Their slogan, "The Do It Yourself Home Improvement Store," seems to refer more to the mindset you have adopted to shop there.

## **The customer is king**

While leading a customer service workshop with a government service organization, I asked the staff, "Who is the most important person in the organization?" Almost every attendee (except one) agreed it was Mr. Albert, the director of their department. They seemed surprised when the one person who disagreed said, "It's our customers; the public whom we serve."

They weren't the only ones who responded this way when I have asked. In fact, I was once instructed by a CEO to ask his employees the same question at the outset of a seminar and count the number of people who named his clients rather than him. He wasn't happy with their responses when I reported back to him. Can you guess what the focus was of the rest of the training event?

Walmart is known for greeters in their stores. Sam Walton, their founder, once said, "There is only one boss: the customer. And he can fire everybody in the company from the chairman on down, simply by spending his money somewhere else."

Has your staff been trained to realize this fact?

## **You get back what you give**

Self-motivated employees and associates are a relief to any executive! Treat customers right and they will overwhelm you with business. Stiff them on service and they will blog, gossip and write articles about how bad you are. A simple check of reviews locally will illustrate that people tell others how good or bad your services are.

Do your employees greet everyone with a smile and warm welcome? Do you train people to serve your customers without micro-management? Do your associates know that your customers are reviewing poor examples more often than good experiences on social media?

Do they realize that people have a choice to do business with you—or not?

This article was written by Jim Mathis, IPCS, CSP, MDiv.

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*In the heart of  
Napa Valley*

**BX**Net  
Builders Exchange Network

**2019 Annual Convention**



**SAVE THE DATE**

**Fairmont Sonoma Inn and Spa  
Sonoma, California**

**February 12-14, 2019**

