





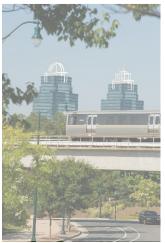


SANDY SPRINGS/PERIMETER CHAMBER OF COMMERCE

#### **STRATEGIC PLAN REFRESH 2019**









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#### REFRESHING THE PLAN - APPROACH

#### THE APPROACH

July 10,2019 - Strategic Planning Refresh Kick-Off



Jabian Consulting engaged for Strategic Planning and presented to the SSPC Board regarding approach and expectations. During the following sessions, Jabian facilitated the SSPC Strategic Planning Committee in updating each of the strategies inclusive of Priorities, Goals and Metrics, and Initiatives.

July 24, 2019 – Introduction of Approach; Review and Refresh of Priority # 1, "Deliver Greater Value to Members"

August 7, 2019 – Priority # 3, "Support Economic Development Efforts in the Region"

August 21, 2019 - Priority # 5, "Promote Partnerships"

September 4, 2019 - Priority # 4, "Influence Public Policy"

September 18, 2019 – Priority # 2, "Maximize the Chamber's Organizational Effectiveness"

#### October 16, 2019 - Updated Initiative Prioritization

Jabian Consulting facilitated sessions with the SSPC Strategic Planning Committee to consolidate, categorize, and prioritize the updated initiatives across all five Priorities

#### November 13, 2019 - Communicated Strategic Plan

SSPC Leadership, supported by Jabian Consulting, delivered and communicated the Strategic Plan and transitioned to plan execution.

#### STRATEGIC PLANNING COMMITTEE

Tom Mahaffey President

Karen Trylovich Chair

Andrea Worthy Economic Development Director, City of Sandy

Springs

Chip Collins Board Member

Mark Rosenthal Board Member

Bret Beldt Board Member

Fred Jewell Board Member, Chair Elect

#### **ADDITIONAL PARTICIPANTS**

Jenny Hutchins Chief Operations Manager

Elspeth Male Marketing & Communications Manager

Brittany Hendler Event Coordinator



#### **PROJECT TEAM**

Chuck Sparrow Executive Lead & Advisor

Kevin Clickner Project Director

Marcus Stallworth Strategy Manager

Cordia Simon Strategy Consultant



#### **OUR MISSION, VISION, AND VALUES**

#### THE MISSION

The SSPC's mission remains clear – to serve as the champion for a prosperous economic environment that enriches our businesses and communities.

#### THE VISION

The SSPC's vision is for Sandy Springs/Perimeter to remain the leading community to live, work, learn and play in the Southeast, through 2025 and beyond

#### THE VALUES

#### **Have Clarity of Purpose**

Simple, precise, and clear alignment of activity to the Chamber Mission and Vision

#### **Act With Integrity**

Adhere to the highest ethical standards in everything we do

#### **Be Transparent**

No hidden agendas and effectively communicate our positions and services to all of our stakeholders

#### **Be Value Driven**

Pursue only what creates added value for our members and community

#### **Focus on Members**

Be committed to responding to the needs of our members

#### Be Innovative

Invest in, guide and support innovation that matters to our members and our community



### SANDY SPRINGS/PERIMETER CHAMBER OF COMMERCE STRATEGIC PLAN REFRESH 2019

**Summary of Accomplishments** 



#### **SUMMARY OF ACCOMPLISHMENTS – 2013 TO PRESENT**

- ✓ Established and Expanded Programs, including
  - Restaurant Council + Events
  - Executive Roundtables
  - Health and Wellness
- ✓ Provided Premier Member Access to Local, State, Federal government leaders
- ✓ Upgraded SSPC Website
- ✓ Increased Membership by 69% (9.2% year-over-year)
- ✓ Strengthened Young Professionals
- ✓ Grown the Annual Fashion Show, benefiting The Drake House
- ✓ Enhanced Sandy Springs Scholarship Fund
- ✓ Established Sandy Springs Technology and Innovation Center
- ✓ Enhanced Promoting Sandy Springs
- ✓ Increased Communication regarding Public Policy (e.g., Mercedes rezoning; Religious Freedom, T-SPLOST)

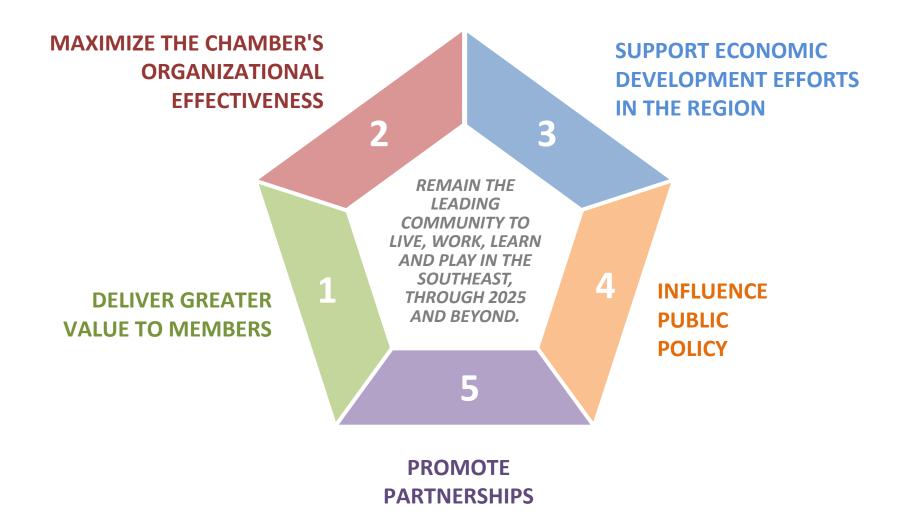


## SANDY SPRINGS/PERIMETER CHAMBER OF COMMERCE STRATEGIC PLAN REFRESH 2019

**STRATEGIC PRIORITIES** 



#### STRATEGIC INITIATIVES IN REVIEW







# **PRIORITY 1:**DELIVER GREATER VALUE TO MEMBERS

The ability to consistently engage members, provide a positive experience, and provide them value that meets their needs and expectations is crucial to building the basic foundation of the Chamber. This basic building block supports the ability to grow membership and rise above the competition.

#### **OBJECTIVES**

Consistently deliver a portfolio of value-based, innovative programming

Programming is the most visible aspect of member participation and involvement. To consistently provide value, the program portfolio requires a rigorous and disciplined evaluation process during ideation, development, and operations. Additionally, member involvement is crucial to generating fresh and innovative ideas.

- 2. Increase focus on recognizing and celebrating member businesses
  Structures opportunities that enable networking, brand promotion, and
  general business promotion to provide a very tangible benefit to current and
  prospective members.
- 3. Ensure a positive experience and drive stronger engagement from member and non-member businesses

Builds and systemically embeds a culture that actively strives for strong and positive chamber experiences across the membership lifecycle. Provides a basis for member satisfaction and recruiting prospective members..

#### **HOW WE WILL MEASURE SUCCESS\***

- 1a. Create new business opportunities through high-quality programming
- 1b. Innovative programs published through highly respected avenues (either an organization or journal/magazine)
- 2a. Spotlight opportunities provided to new businesses
- 3a. Participation rates overall and for member/non-member splits





# PRIORITY 2: MAXIMIZE THE CHAMBER'S ORGANIZATIONAL FFFFCTIVENESS

Fundamental and critical in delivering greater value to Chamber members is an operationally effective and financially stable organization. The Chamber strives to maximize it's organizational effectiveness by focusing on expanding its membership base, creating systems for stronger engagement from all Chamber stakeholders, and addressing operational resource needs.

#### **OBJECTIVES**

- 1. Expand and strengthen member base
  - The outward sign of the Chamber's effectiveness is driven by a strong membership strategy that incorporates a broad evaluation of prospective members and drives strong member lifecycle management.
- 2. Drive stronger engagement and accountability from Chamber leadership, and staff
  - Implement a governance and accountability system that drives a culture of collaboration, strong relationships, desire to serve, and ultimately supports effective operations.
- 3. Conduct an annual review of Chamber operations and develop an improvement plan
  - Assess, plan, and implement initiatives to address people, process, and technology needs to support current and future operations.
- **4.** Expand communication and awareness of the Chamber's value Establish and implement a marketing communications plan.

#### **HOW WE MEASURE SUCCESS\***

- 1a. Growth in Chamber membership
- 2a. Board member attendance rate to invited events (e.g., board meetings and events)
- 2b. Member involvement in programs as volunteers
- 2c. Annual survey and event survey responses that specify "Significantly favorable" rating
- 3a. Balance resources and work week hours of chamber staff
- 4a. Growth in membership renewal rate
- 4b. Prospect referral rate from members
- 4c. Total membership increase due to referrals
- 4d. Total event attendance





# PRIORITY 3: SUPPORT ECONOMIC DEVELOPMENT EFFORTS IN THE REGION

Once the foundation for an effective organization is built and on a positive trajectory, the Chamber will be able launch more robust and involved economic development activities. The Chamber will hone in on areas that plug into and enhance the activity of current economic development organizations. Key opportunities exist within the small & mid-sized business (SMB) segment, key regional industries, and promotion of the region to support attraction and retention efforts.

#### **OBJECTIVES**

1. Promote the Sandy Springs / Perimeter region as the best place to live, work, learn, and play

The promotion of the SSPC region reinforces the message that the Chamber is focused on a prosperous business environment and quality of life for the whole community.

2. Create and promote key geographic regions

Several key regions important to direct and indirect economic health of the SSPC area. Care and feeding of these regions creates a virtuous circle of ecosystem development.

3. Drive small and mid-sized business (SMB) retention, recruitment and job-creation efforts

SMB is a target growth area for SSPC and has been identified as a significant focus area by the City of Sandy Springs.

#### **HOW WE MEASURE SUCCESS\***

- 1b. Growth of local business via new business licenses and offices opened
- 2a. Industry promotion by establishing and supporting targeted industry councils
- 3a. Growth in per capita income (a macro measure of economic prosperity)





# PRIORITY 4: INFLUENCE PUBLIC POLICY

To support strong economic development, the Chamber will be the preeminent advocate for public policies that foster a pro-business environment.

#### **OBJECTIVES**

1. Coordinate bilateral communications between government and businesses

Serve as the liaison between government and businesses within the region and constantly bridge the communication gap between the two bodies.

- 2. Strengthen relationships at the local and state level
  Build stronger relationships at both the local and state levels of
  government these influential relationships greatly benefit members
  and would provide a channel to address their public policy needs.
- 3. Advocate for policy development at the local and state level Find ways to represent their member community for new policies and regulations being developed that could affect the regions they serve.
- **4. Educate membership on policies influencing businesses**Increase awareness and provide updates regarding public policy and potential impacts to our members and the business community.

#### **HOW WE WILL MEASURE SUCCESS\***

1a/2a/3a. Number of government officials actively engaged with board and or committee seats

2b/3b. Targeted government official participation rate in events

2c/3c. Passing rate for legislation and motions supported by the Chamber





## PRIORITY 5: PROMOTE PARTNERSHIPS

Partnerships will play a key role in delivering on the longer term vision of one community in the Perimeter region. Strong partnerships drive an expansion of membership value and therefore net new membership. Additionally, the partnerships support a consolidated block of voices to represent businesses across community lines. This single voice enables a stronger and more effective influence to public policy and economic development across the region.

#### **OBJECTIVES**

#### 1. Identify regional issues and set priorities

The proactive engagement of partners and members to identify, prioritize and drive key issues will bring consistency of public policy and economic development across the region.

#### 2. Identify, assess, and develop formal partnerships

The first step in achieving positive partnership momentum is through identification and development of those relationships that drive the most value.

3. Foster collaboration and coordination with partnerships.

In order to successfully develop partnerships, perform an honest assessment of the Chamber needs, map those against possible partnerships to drive the most value, and develop a strategy to engage targeted partners.

#### **HOW WE WILL MEASURE SUCCESS\***

- 1a. Develop a single regional issue prioritization model
- 2a/3a. Nurture partnerships by maintaining and expanding formal relationships with regional professional organizations
- 2a/3a. Seek out and participate (i.e., board seats) in influential regional organizations
- All. Establish, initiate, and foster purpose-based partnerships. Work with partners on issues we will tackle together with a purpose.



## SANDY SPRINGS/PERIMETER CHAMBER OF COMMERCE STRATEGIC PLAN REFRESH 2019

**INITIATIVE SUMMARY** 



#### **INITIATIVE SUMMARY**

An exercise was conducted to determine what should "Start, Stop, and Continue" for each Priority. The results were aggregated and then consolidated, categorized, and prioritized. The outcome is an updated ranked list of <u>47 tactical initiatives</u> with timing, level of effort, and owners. The distribution of initiatives across the Priorities is below.

	# of Initiatives
Priority 1: Delivering Greater Value to Members	13
Priority 2: Maximize the Chamber's Organizational Effectiveness	10
Priority 3: Support Economic Development Efforts in the Region	17
Priority 4: Influence Public Policy	4
Priority 5: Promote Partnerships	3



#### **INITIATIVE SUMMARY – SHORT TERM**

The below list are the initiatives that were prioritized as most important for the refreshed strategic plan and thus, to be worked on in the short term.

Rank	Initiative	Associated Priority
1	<ul> <li>Committee-structured operations</li> <li>a) Establish and maintain targeted committees and task forces to support the development and implementation of Chamber priorities</li> <li>b) Establish a Staff and Operational Oversight structure involving the board</li> <li>c) Implement external accountability of staff</li> </ul>	Maximize the Chamber's Organizational Effectiveness
2	Overall Programming Assessment  Conduct annual assessment of all programming to determine value vs. effort and make decisions on which programs to continue, expand, or cut. Assess which affinity events could be combined. (Consider revamping networking at noon)	Delivering Greater Value to Members
3	Membership Strategy  a) Design and implement a membership strategy to develop and attract target members  b) Create strategy to retain current members  c) Create Strategy to recapture previous members	Maximize the Chamber's Organizational Effectiveness
4	Engagement Plan Refinement Develop / refine member engagement plan (Day 1, 30, 60, etc.). Revise new member orientation (i.e., potential to move to evening event).	Delivering Greater Value to Members



#### **INITIATIVE SUMMARY – SHORT TERM**

The below list are the initiatives that were prioritized as most important for the refreshed strategic plan and thus, to be worked on in the short term.

Rank	Initiative	Associated Priority
5	Member Segmentation & Execution Plan Conduct a member segmentation across SSPC's member base to determine who are main member segments and the best methods for engagement. Develop execution plan to target segments including programming, marketing, sponsorships, referrals, ambassadors, and communications. Focus on increasing investor-level programming and relationship building across company.	Delivering Greater Value to Members
6	<ul> <li>Communications Audit</li> <li>a) Assessment of all communication channels currently utilized and develop strategy to increase/decrease/revise channels and content as needed</li> <li>b) Develop Marketing communications plan</li> <li>c) Leverage outside Marketing support to evaluate and optimize the Chambers Marketing and communication efforts</li> <li>d) Focused effort on leveraging social media platforms to retain and attract new membership and strengthen brand recognition</li> <li>e) Develop and implement a marketing strategy and plan focused on better leveraging digital channels and creating fluid awareness of the benefits of Sandy Springs</li> </ul>	Delivering Greater Value to Members



#### **Appendix**

Ranked Initiative List (All)



Rank	Initiative	Associated Priority
1	<ul> <li>Committee-structured operations</li> <li>a) Establish and maintain targeted committees and task forces to support the development and implementation of Chamber priorities</li> <li>b) Establish a Staff and Operational Oversight structure involving the board</li> <li>c) Implement external accountability of staff</li> </ul>	Maximize the Chamber's Organizational Effectiveness
2	Overall Programming Assessment  Conduct annual assessment of all programming to determine value vs. effort and make decisions on which programs to continue, expand, or cut. Assess which affinity events could be combined. (Consider revamping networking at noon)	Delivering Greater Value to Members
3	Membership Strategy  a) Design and implement a membership strategy to develop and attract target members  b) Create strategy to retain current members  c) Create Strategy to recapture previous members	Maximize the Chamber's Organizational Effectiveness
4	Engagement Plan Refinement Develop / refine member engagement plan (Day 1, 30, 60, etc.). Revise new member orientation (i.e., potential to move to evening event).	Delivering Greater Value to Members
5	Member Segmentation & Execution Plan Conduct a member segmentation across SSPC's member base to determine who are main member segments and the best methods for engagement. Develop execution plan to target segments including programming, marketing, sponsorships, referrals, ambassadors, and communications. Focus on increasing investor-level programming and relationship building across company.	Delivering Greater Value to Members



Rank	Initiative	Associated Priority
6	<ul> <li>Communications Audit</li> <li>a) Assessment of all communication channels currently utilized and develop strategy to increase/decrease/revise channels and content as needed</li> <li>b) Develop Marketing communications plan</li> <li>c) Leverage outside Marketing support to evaluate and optimize the Chambers Marketing and communication efforts</li> <li>d) Focused effort on leveraging social media platforms to retain and attract new membership and strengthen brand recognition</li> <li>e) Develop and implement a marketing strategy and plan focused on better leveraging digital channels and creating fluid awareness of the benefits of Sandy Springs</li> </ul>	Delivering Greater Value to Members
7	Strategic Action Plan Develop a strategic Action Plan that identifies the regions (potentially will be called districts in the future), their needs, goals for each region, regional business sponsors (non-monetary), and programming that targets each region equally.  Regional Business Research Conduct research to understand the percentage of business in each region / district Regional Business Sponsors Develop partnerships with businesses in each regional area and empower sponsor to host events and be a regional advocate.	Support Economic Development Efforts in the Region
8	Access to the City Create formalized access points for Chamber members to City Officials, resources, etc.	Support Economic Development Efforts in the Region



Rank	Initiative	Associated Priority
9	New Member Orientation Assess the weak points of the current orientation structure, and identify new elements to introduce to encourage engagement and add impactful, enduring value to attendees	Support Economic Development Efforts in the Region
10	Application Expansion Expand Chamber application with additional questions related to specific value the applicant is interested in receiving from the Chamber.	Delivering Greater Value to Members
11	Chamber 101 Campaign Develop campaign that summarizes benefits and resources of the Chamber. Potential to have several, based on customer segmentation effort.	Delivering Greater Value to Members
12	Small Business Toolkit  Develop a toolkit that can be provided to new small businesses that acts as a lure to the Chamber of Commerce membership.	Support Economic Development Efforts in the Region
13	Formalize Sales & Account management operations  a) Review and optimize Sales quotas and compensation plan b) Improve account management and retention c) Evaluate changing one sales position to account manager	Maximize the Chamber's Organizational Effectiveness
14	Annual Membership Survey  Conduct an annual membership survey to understand their satisfaction with the chambers programming, processes and value add to the members, as well as possible areas of improvement.	Maximize the Chamber's Organizational Effectiveness



Rank	Initiative	Associated Priority
15	Build new Chamber relationships Build relationships with other chamber members (examples - North Fulton, Alpharetta, Johns Creek) to share experience. Objectives would be to: a) Share ideas b) Identify their goals / initiatives for the year c) How we would work together d) Cross-promote events  Strengthen strained relationships Focus specifically on strengthening relationships with Dunwoody, Brookhaven, Heritage.	Promote Partnerships
16	<b>Live, work, play partnerships</b> Develop better partnership with organizations that are impacting Live, work, learn, play in Sandy Springs	Support Economic Development Efforts in the Region
17	Ambassador Program Assessment Assess the current Ambassador Program with aim in increase the effectiveness and appeal of the program. Identify right person/people to lead and execute on the program	Delivering Greater Value to Members
18	Personal Invitation to Events  Develop a process that enables staff to send out personalized invitation to members for events in order to increase chamber awareness	Delivering Greater Value to Members



Rank	Initiative	Associated Priority
	Identify and develop new partnerships and strengthen existing partnerships, using the steps outlined below:	
	a) Take an inventory of current partnerships	
	b) Develop criteria to qualify partners c) Identify Target Partnerships	
19	<ul> <li>d) Formalize shared goals with Partners (examples discussed - Leadership Sandy Springs; SSEF)</li> <li>e) Develop and produce shared events and programs</li> <li>f) Publicize where we partner with other organizations / chambers</li> </ul>	Promote Partnerships
	Continue to focus on current partnerships	
	Continue partnerships with SSEF; Drake House	
20	Small Business Council Expand the function or goals of the Small Business Council to continue to capitalize on its success.	Support Economic Development Efforts in the Region
	Member education on legislation	
	a) Federal level update at the end of legislation session	
	b) State level update at the end of legislation session	
21	c) Local level update at the end of legislation session	
	Policy / Legislation Communications plan	Influence Public Policy
	a) Repackage from city council meetings / sessions and send to members	
	b) Repackage information/content produced by Metro Atlanta Chamber of Commerce and send to SSPC members	
	c) Provide weekly email update	



Rank	Initiative	Associated Priority
22	Member Spotlight Expansion  Develop plan to expand member spotlights at events and across all marketing channels	Delivering Greater Value to Members
23	Annual Operational Review / Audit a) Conduct a Financial Audit b) Review of internal processes effectiveness c) Review and/or develop Chamber business process landscape	Maximize the Chamber's Organizational Effectiveness
24	Innovation Center - Dir. Of Innovation Create a formal Director of Innovation position and new member pipeline that connects new businesses to the Director to help their business and provide them with a Toolkit.	Support Economic Development Efforts in the Region
25	New Member Pipeline Management Establish a strategy and implement tools to efficiently monitor and track new member sign-ups	Maximize the Chamber's Organizational Effectiveness
26	Chamber hotline Develop a communication channel (email address, phone line, chatbot) that businesses can contact any day or time with the expectancy to receive a response within a business day.	Support Economic Development Efforts in the Region
27	Parks & Recreation Partnership  Create a partnership/collaboration with Parks & Recreation to increase awareness of the great parks and recreational spaces in Sandy Springs.	Support Economic Development Efforts in the Region
28	Implement Annual President and Staff Performance reviews & Goal Setting Develop and implement annual performance reviews for Chamber president and staff, to include a review of the goals for each role and setting of new goals for the next review cycle.	Maximize the Chamber's Organizational Effectiveness



Rank	Initiative	Associated Priority
29	Business Research  Determine what data the Chamber needs to gather and maintain (refresh) about businesses, Gather research about each business and their leadership, to include where their leadership lives, and why they chose Sandy Springs for their company.	Support Economic Development Efforts in the Region
30	Targeted Geographical Events  Conduct research into potential of developing events based on geography to create smaller, more engaged communities of members.	Delivering Greater Value to Members
31	Non-Profit of the Month  Develop an effort to highlight the non-profit of the month and the impact that they are having in Sandy Springs to bring awareness of the benefits to living, working & playing in Sandy Springs.	Support Economic Development Efforts in the Region
32	Workforce Council Continue Workforce Council, promoting how it is a unique value offering in comparison to other Chambers of Commerce.	Support Economic Development Efforts in the Region
33	Cross-Pollination of boards with Partners Increase cross-pollination of boards other partners to foster shared benefits. Establish responsibilities and expectations for board participation.	Promote Partnerships
34	Hospitality Segment Develop a better partnership, coordination with hospitality segment with the focus of: a) creating shared marketing goals b) Co-sponsoring Events c) De-conflicting overlapping efforts d) Addressing the issues of marketing and advocacy	Support Economic Development Efforts in the Region



Rank	Initiative	Associated Priority
35	<b>Develop Staff Succession Plan</b> Develop Succession plan for each staff position within the chamber.	Maximize the Chamber's Organizational Effectiveness
36	Business Expo Conduct assessment on value of business expo and identification of potential strategy for increasing participation from members.	Delivering Greater Value to Members
37	Loyalty Program  Develop loyalty program that provides catalog of services to members via giveaways, and participation/sponsor awards (i.e., VIP tables at events, access to non-SSPC events, concert tickets, etc.)	Delivering Greater Value to Members
38	<ul> <li>Voice member legislation concerns externally         <ul> <li>a) Provide a state of Sandy Springs business community to City Council</li> <li>b) Target restrictive economic development regulations - leverage partnerships that have lobbying capabilities / resources, ensuring that the voice, concerns and interests of Sandy Springs members are included</li> </ul> </li> <li>Advocacy plan         <ul> <li>a) Implement the development of action steps for policy issues and an effective means to disseminate and activate members.</li> </ul> </li> </ul>	Influence Public Policy
39	Advocacy Relationships plan Foster relationships for business of all sizes to local and state governments.	Influence Public Policy



Rank	Initiative	Associated Priority
40	Sandy Springs Promotion Campaign Develop videos and digital ads highlighting the benefits and opportunities and plans for the city, as well promotional assets and schedule to keep consistent messaging with partners and businesses.	Support Economic Development Efforts in the Region
41	Gather member legislation concerns Facilitate roundtable discussions to discover more of members' legislation issues	Influence Public Policy
42	Internal Development and Training Provide tailored training for internal staff development and leverage training from other chambers in the metro Atlanta area.	Maximize the Chamber's Organizational Effectiveness
43	Member Passport  Develop member passport that enables discounts at member establishments.	Delivering Greater Value to Members
44	Review Board Orientation Revisit / Review the format and intended outcome of orientation	Maximize the Chamber's Organizational Effectiveness
45	Business Needs Survey  Develop and administer a survey to new companies to understand their relevant needs and goals.	Support Economic Development Efforts in the Region



Rank	Initiative	Associated Priority
46	SCORE partnership  Develop a partnership with SCORE to better direct business owners to SCORE and create awareness of the impact that SCORE has in Sandy Springs.	Support Economic Development Efforts in the Region
47	Mid-Size Business Membership Develop a strategy that focuses on speaking to and attracting mid-sized businesses, versus just small and corporate businesses.	Support Economic Development Efforts in the Region



## Thank You

