2021-2023 STRATEGIC PLAN
For the Chamber of Commerce for Greater Moncton

January 27, 2021

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BACKGROUND

This 2021-2023 strategic plan is an evolution of the 2017-2020 strategic plan and is intended to provide a roadmap for strategic priorities and objectives, the actions required to achieve them and the success measures per action.

To evolve the plan, a unique ReThink process was followed that included in-depth discovery sessions, research analysis and comprehensive stakeholder engagement with 32 participants to pinpoint the true objectives, opportunities and barriers that would guide the development of an effective plan. This process uncovered the following key insights:

- The strategic plan should act as a roadmap for the Chamber and its board and staff, outlining the guiding principles by which decisions will be made over the next 3 years
- The goal is for members of the Chamber to be able to answer the question "Why are you a member of the Chamber?"
- Members have different needs and the Chamber provides different value to each depending on those needs – there is no "one size fits all" approach to value, it's specific to each business
- Access to relevant information and financial assistance is one of the key needs of members today

There were many strengths established as part of the previous strategic plan which were confirmed during the ReThink process, both from internal and external stakeholders. This 2021-2023 strategic plan builds on these strengths and outlines opportunities to both provide increased value to members and communicate this value to the business community.

It's also important to consider that this plan was developed accounting for situational factors and is built to be an effective roadmap during COVID-19, throughout the recovery phases and post COVID-19.

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THE CHAMBER'S REASON FOR BEING TODAY

Mission: The Chamber of Commerce for Greater Moncton promotes the success of its members and the economic well-being of the overall business community.

Vision: To propel Greater Moncton to unrivaled economic growth that leads New Brunswick to a prosperous future.

Core purpose today: Inspiring Growth.

The CCGM supports businesses in different ways at different times depending on the size, life-stage and immediate needs of specific businesses.

The CCGM offers services either directly or indirectly designed to meet the needs of businesses within the community, including:

- Providing support, information and advice for businesses
- Creating opportunities to meet and interact with other members
- Representing and advocating for members on issues with key leaders and elected officials
- Celebrating and encouraging business excellence in the community
- Providing mentoring, educational and professional development opportunities
- Leading the public discussion on issues important to members and their business development and growth

EXECUTIVE SUMMARY

The answer to the question "Why are you a member of the Chamber of Commerce for Greater Moncton?" was a guiding force during the strategic development of this plan. The learnings and knowledge that this answer will vary across members, each providing a different answer based on their specific business needs, led to the overarching strategic approach of providing value in different ways to different members.

> "We can't be everything to everyone, but we can be something to someone."
>
> ~ Simon Sinek

The strategies within this three-year plan include ways for the Chamber to support businesses in different ways at different times depending on the size, life-stage and immediate needs of the specific business, as well as ways to communicate and improve the value it offers. The strategies fall under three core pillars:

1. **Membership Value and Engagement**
   - Strategy 1: Segment Members
   - Strategy 2: Expand Value-Added Offerings
   - Strategy 3: Communicate Value to Members
2. **Advocacy**
   - Strategy 1: Define the Chamber's Role in Advocacy
   - Strategy 2: Communicate the Advocacy Role
3. **Community Leadership**
   - Strategy 1: Define the Chamber's Role as a Community Leader
   - Strategy 2: Communicate the Leadership Role

Recommendations for development and implementation of a measurement plan, as well as internal governance of the plan are included as separate sections within the strategic plan. An integral part of internal governance is focused on utilizing the Board to lead the elevation of the role of the Chamber both internally and externally, with the Board's role in leading and actioning the plan included at the end of each strategic recommendation.

Within each of the strategies, tactical recommendations that will lead to effective execution of the strategies are included. It's important to consider that these are recommendations only and the responsibility for determining which tactics will be integrated into the Chamber's operational plan is that of the Chamber CEO and staff.

MEMBERSHIP VALUE AND ENGAGEMENT

MEMBERSHIP VALUE AND ENGAGEMENT STRATEGY #1:

SEGMENT MEMBERS

To provide the ability to offer customized and relevant content to members at a manageable scale, segment members using two factors:

1. **Business size** - divide into three segments based on number of employees:
   - Small – under 10
   - Medium – 11 to 100
   - Large – over 100

2. **Business sector** – divide into 10 key sectors based on current membership data:
   - Learning
   - Transportation
   - Health and wellness
   - Professional, management and digital services
   - Government
   - Manufacturing and repair
   - Non-for-profit
   - Office supplies and couriers
   - Contractors and industrial services
   - Retail, restaurants and food service

TACTICAL RECOMMENDATION #1:

Segment Content for Members

When providing or publishing content, segment based on member groups using a Content Segmentation Grid that defines what content should be provided to each of the segments.

Sample Content Segmentation Grid

	Is this content relevant to the following sized businesses:		
		Small	Medium	Large
	Learning			
	Transportation			
	Health and Wellness			
Is this content relevant to the following sector:	Professional, Management and Digital Services			
	Government			
	Manufacturing and Repair			
	Non-for-profit			
	Office Supplies and Shipping			
	Contractors, Industrial and More			
	Retail, Restaurants and Food Service			

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If the grid box if checked, then the content should be provided to that segment. See example of a completed grid below:

Content Example

Completed Content Segmentation Grid Example

	Is this content relevant to the following sized businesses:			
		Small	Medium	Large
	Learning			
	Transportation			
	Health and Wellness			
Is this content relevant to the following sector:	Professional, Management and Digital Services	x	x	x
	Government			
	Manufacturing and Repair			
	Non-for-profit			
	Office Supplies and Shipping	x	x	x
	Contractors, Industrial and More			
	Retail, Restaurants and Food Service	x	x	x

TACTICAL RECOMMENDATION #2:
## Use Segmented Content Whenever Possible

Segmented content will be more relevant and drive more value for members and therefore should be used in as many communication channels as possible, including:

1. Members Portal
2. Email
3. Phone Calls
4. In Person

Members Portal

On the members portal website, organize information based on the segments, considering permanent sections for resources and information for small, medium and large sized businesses, with content on internal pages divided by sectors.

Member-to-Member Deals is one of the more trafficked pages on the site and can be used to drive members to other relevant resources and information, as seen in the image below:
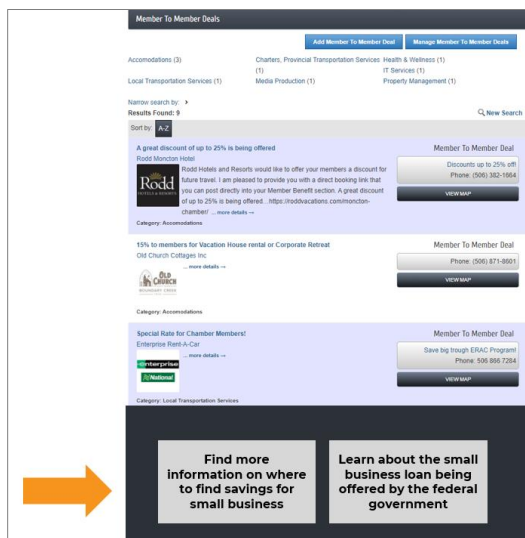
This tactic can also be employed on the other internal portal pages.

Email

Leveraging the segmented member database, create separate emails lists for the different segments - 30 in total to cover the three business sizes and 10 sectors. Using the Content Segmentation Grid, send emails to email lists if grid defines it relevant to that segment.

Take the following considerations into account when developing email content:

- Deals can be used as an attention-grabbing email content tactic to get users to open an email and click through to perform an action

- New tools and resources can also be used to pique interest and get members to the portal to learn more
- After initial customization of content per segment, emails can be further customized to include more content specific to segments and lead users down a content journey specific to their needs
- On every email, include a simple click-of-a-button question "was this email relevant to you?" and use this to improve content over time

Sample Email Button:

Phone Calls

When completing outreach via phone calls, use the Content Segmentation Grid to personalize communication while ensuring to ask the following four questions consistently:

1. What's going well with you and your business?
2. What are some of the key challenges you and your business are facing?
3. What's working well in terms of the tools and services the Chamber is providing?
4. What's not working well in terms of the tools and services the Chamber is providing?

In-Person and One-on-One

Customize communications for the audience based on the segment(s) represented at face-to-face and one-on-one engagements, including meetings, conferences, and events.

Once the audience is confirmed for an engagement, develop communications and materials customized to the segments included within that audience, including speeches, presentations, speaking notes and leave-behinds.

TACTICAL RECOMMENDATION #3:
Measure, Adapt and Repeat

Member segmentation and content customization allows for great learning opportunity, with the ability to determine what type of information, resources and tools provide real value to members based on simple interaction tracking.

Ensure analytics tracking continues to be implemented on all digital content, including segmented content on the follow platforms:

- Members portal website – Google Analytics on every click

- Email – built-in email service provider analytics on every click, including simple question at bottom of every email "was this email relevant to you?"

By tracking what content members and different segments are interacting with the most and least, future content can be adapted to reflect what members need and want, and this cycle can be repeated continuously to improve the value provided via content over time.

More detailed recommendations are included as part of the measurement plan on pages 24-26.

TACTICAL CONSIDERATIONS:
Content Quality and Frequency

When developing content, keep in mind that sometimes less is more. Focus on quality over quantity, providing useful, relevant, valuable content to members every time.

Consideration #1: It's a continuous, ongoing learning process.
By segmenting content to the member groups, useful learnings and insights can be used over time to improve the quality of the content provided to each.

Consideration #2: Be targeted with communications while offering content to all members.
Strategically target Chamber communications (such as email, event invitations, etc.) to those segments in which the most value will be provided, while at the same time, offering the same content and information to members via the member portal website.

STRATEGY #1 MEMBER SEGMENTATION
Tactical Action Steps
Below is a list of the next steps required to implement the recommendations within strategy 1:

1. Clean up current membership database
2. Update membership database with segmented categories, considering bi-yearly updates to member information and segments
3. Implement Content Segmentation Grid, providing mini training program to staff
4. Develop a plan for updating the members portal website with segmented content, considering any other required updates given web development efficiencies
5. Develop analytics tracking plan on members portal website and emails

Role of the Board
Provide guidance and leadership on member groups to be formed and the content that provides the most value and relevancy to those groups.

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MEMBERSHIP VALUE AND ENGAGEMENT STRATEGY #2:

EXPAND VALUE-ADDED OFFERINGS

To provide value based on the current needs of members, offer expanded tools and services that address growing issues and opportunities within the business community:

- A navigator of information and connector to resources
- Virtual options in a growing digital world

In the short to mid-range term of the implementation of this strategic plan, travel restrictions will likely still be in place and the focus on expanding these offerings to replace the value provided by networking is essential.

TACTICAL RECOMMENDATION #1:

The Business Navigator

Develop a digital Business Navigator of Greater Moncton that acts as the go-to resource for all business resources, information and services in the community. Even if the Chamber doesn't provide a service directly, this Business Navigator will connect them with an organization or service provider that does.

Executional Considerations
- Virtual live-chat style functionality offered within members portal that provides a response within 24 hours
- Test current Chamber platform MIC for required functionality, or free web platforms like Comm100 that provide live chat functionality that easily integrates within websites, similar to paid LiveChat and Kayako platforms
- This style of support provides the ability for multiple staff or representatives of the Chamber to manage responses, with the potential for representatives specific to the segments
- Given the short-term need for COVID-19 related information and business implications, ensure Business Navigator is set up to provide adequate support in this area

TACTICAL RECOMMENDATION #2:

Sector-Specific Training and Seminars

Develop training and educational workshops, materials and tools that are specific to business sectors. Recent engagement with members and the business community indicates needs for training and education in the following areas:

- eCommerce – platform options, training on integration and implementation
- Social media – education on platform opportunities and training on usage

Consider developing certification stamp/seal to provide to participants that drives awareness and credibility of the Chamber workshops within the community.

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Audio and visual quality is essential for delivering user-friendly, engaging seminars, and many members would not have access to their own quality recording devices. As part of the seminar and workshop offerings, the Chamber can offer a space where members can film and record their sessions for free, ensuring a quality product for members.

Quality recordings also provide the opportunity to showcase and share this valuable content with other members, with a dedicated section on the portal's events and resources to house this content as an option.

At the end of every session, email participants complete a survey asking whether the session was valuable and whether they learned from it. Customize each survey to the session at hand.

TACTICAL RECOMMENDATION #3:
Mentorship Program

Develop and offer mentorship program where more established members provide coaching and mentoring services to less established businesses, specific to their sector and business size.

Executional Considerations
- Pilot mentorship program with two targets – to business start-ups and immigrants who start businesses, and to the staff of members
- Invest in online platform that provides the functionality for virtual one-on-one and group mentoring sessions, such as:
    - Together – one of the top reviewed platforms for peer-to-peer mentoring, with an easy to use and integrate user face
    - Graduway – similar to the above and offers free tools to certain eligible companies during COVID-19.
- Free demos of these platforms and others are available for testing, allowing the Chamber time to determine which best suits its needs

Different Value for Different Members
The mentorship program allows the opportunity to provide different value to different types of members, depending on whether they are the mentor or mentored.
For mentors, they are positioned as a leader in their business sector and gain access to contacts within that community.
The mentored gain access to knowledge, advice and leadership they wouldn't have access to if not for being a member of the Chamber, and also establish contacts in their sector.

Payment Options
Development of flexible payment options based on the amount of mentoring hours invested, considering different levels of mentorship categories based on numbers of mentoring hours.
Offer free membership and special access to services and tools to mentors who participate.

TACTICAL RECOMMENDATION #4:
Use Members Portal as a Tool

Use the members-only website portal as a tool to provide value to members. The resources and tools that provide value to members need to be available on the portal and regularly updated to remain relevant. This portal is especially important while in-person access to certain services and resources are unavailable due to COVID-19.

Homepage
Update to include a summary of the latest value-added offerings, such as tools and services, seminar recordings, etc. to drive to key resources within the portal.

Segment content within sections to match membership segments, providing content specific to business size and sector upon easy navigation.

Directory
Update the categories in drop-down menu to match member segments, sortable by sector and size.

Events
Events, whether virtual or in-person, are a key value provider for members. Increase the effectiveness of this section of the portal by:

1. Adding a section for any event virtual materials, such as recorded videos, presentations, etc., so that members who did not attend and those that did that want to share learnings (for instance, with staff), can gain value
2. Sorting by relevancy, with the ability to filter by segment
3. Incorporating visuals to initial listing – many events have promotional materials that do a compelling job of communicating what the event entails, which can draw more eyes and users than copy alone

Resources
As the virtual hub for the Chamber, the Resources section should be the main section of the portal, providing access to all resources of value, including:

- Timely and relevant information
- Tools
- Services
- Reports (no need for this to be a stand-alone page)

News
Populate with relevant news from the Chamber's portal, social feeds, press mentions and news within our business community. This section will require very regular updating and backend functionality to pull in relevant news should be considered.

If this section cannot be updated regularly, consider whether it is required (is it providing value to members?).

Refer a Business for Membership
Create a sticky banner across the bottom of the portal that drives members to refer a business for new membership (currently this callout is towards the bottom of the homepage).

Consider membership-based incentives for referrals, such as presence on website or social media, special access to event, etc.

TACTICAL RECOMMENDATION #5:
Enhance Web and Social's Potential for Value-Add to Members

Provide increased value for members by offering enhanced content placements on the community facing website and via social platforms.

Executional Considerations
1. Update the current rotating banner for sponsors to showcase a logo, key message, visual and call-to-action, acting like a digital ad for sponsors
2. Develop social media content opportunities where the Chamber can post similar content to the above sponsor ship banner, but across social platforms for increased exposure

STRATEGY #2 EXPAND VALUE-ADDED OFFERINGS
Tactical Action Steps

Below is a list of the next steps required to implement the recommendations within strategy 2:

1. Develop roll out plan for the Business Navigator, including preparing internal resources, compiling access to content, testing virtual platforms and a pilot program with a select group of members prior to full launch
2. Develop list of topics for potential training, seminars and events, with a specific focus on virtual execution in the short term
3. Determine whether the Chamber will invest in a virtual in-house studio where members have access to quality audio and video recording devices
4. Create a technical requirements document for the Mentorship Program to determine all needs of the program
5. Test the demo versions of virtual mentoring platforms available to determine which one suits the needs of the Chamber best, while using these demos to pilot the mentorship program with a select group of members
   Include content and functionality updates for the members portal to serve as a tool within the website update plan established out of strategy 1
6. Develop sponsorship package options for social media support

Role of the Board
Provide guidance for training and seminar opportunities that will allow for high value to be delivered to members.
Offer mentorship services within Mentorship Program based on specific segment, expertise and skillset.
Use the members portal website as a tool for current business needs, providing feedback on how value can be improved.

MEMBERSHIP VALUE AND ENGAGEMENT STRATEGY #3:
COMMUNICATE VALUE TO MEMBERS

With more relevant and customized content, and with services and tools that provide increased value to members, the Chambers offering and impact needs to be effectively communicated to members across all possible communications touch-points, including:

1. Website and member portal
2. Emails
3. In-person engagements
4. Social platforms
5. Direct communication opportunities

Within oral communication, copy and visuals, the value the Chamber provides both overall and at a segmented level can be used to drive engagement with current members and the business community.

TACTICAL RECOMMENDATION #1:
Update Content on Members Portal and on Website

Use the homepage of the community-facing website to drive awareness of the value the Chamber provides by:

1. Highlighting the tools, services and offerings the Chamber providers in an easy-to-digest, engaging way – using visually concise graphics, showcase the many different value offerings the Chamber provides and how they help drive growth of the business community
2. Creating a bigger presence for the Member Log-In area with a teaser of what membership provides – develop a section that stands out and draws attention for members, highlighting the latest information/tools/services/event in a quick, enticing way that drives members to log in for more
3. Including a strong "Become a Member" call-to-action – create a button that draws attention and is easily accessible that drives to the contact information for becoming a member

While establishing the members portal website as the virtual hub for access to the Chamber as part of strategy 2, update the resources content to be as value-oriented and engaging as possible to members.

Create and Share Engaging Content
- Selectively choose key content that can be turned into infographic-style animations easily from a PowerPoint or other document, for instance statistics from a webinar or the key takeaways from a lunch and learn – this can be used on the homepage of the portal and website to drive users to read more
- Curate engaging content from other relevant, credible sources – leverage relevant, insightful and useful content developed by other organizations, businesses and stakeholders

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TACTICAL RECOMMENDATION #2:
Update Content in Emails

Leverage the visual content developed for the website and portal, as well as the curated content in the segmented emails being sent to members.

Develop a content plan that establishes a communication frequency of one relevant email per quarter and includes three additional emails:

1. **Welcome email** – a customized welcome email to the new member based on the pre-established segments, showcasing the value the Chamber provides.
2. **Annual survey** – a yearly member satisfaction survey via email, customized to the segments.
3. **Renewal reminder** – 60 to 30 days before their membership renewal is due, remind them of this with a message driving awareness of the new services, tools and resources the Chamber is providing that are relevant to them

Mailchimp, the Chamber's current email service provider, allows for segmented audiences with segmented content created in the form of content blocks. Different content blocks can be developed per segment, with tracking used to determine which content blocks are more relevant to different segments and can be used for ongoing learning and improvement.

TACTICAL RECOMMENDATION #3:
Update Content for In-Person Engagements and Develop Frequency Plan

When in-person engagements allow, leverage the visual content from the website and portal in presentation materials, visual graphics, etc. Include value-driven messaging in speaking notes, presentations, conversations, etc.

Develop a frequency plan for in-person visits from the CEO of the Chamber to key members using the segmented member list and the Chamber priorities to determine which members can most benefit from an in-person visit, likely those the Chamber faces the largest opportunities and threats with.

TACTICAL RECOMMENDATION #4:
Update Content for Social Platforms

Leverage the visually engaging content created for the website and portal on social platforms, showcasing the value the Chamber provides and driving users to the website or portal for more information.

Consider developing testimonial-style content that showcases the specific value provided to a member, using this to drive awareness and engagement with members and potential members within that segment.

Also share relevant member and business community content that drives value in our region.

TACTICAL RECOMMENDATION #5:

Create Welcome Packs for Members

Drive awareness of the tools, services and resources the Chamber provides while also encouraging brand affinity with a Welcome Pack for new Members that includes:

1. One Pager – with thank you note hand-signed and engaging description of the services available to them as a new member, driving them to the portal to start accessing.
2. Member Window Decal – a badge-of-honour window decal meant to be displayed at the member's business.
3. Employee Cards – card-style documents that can be handed to the staff of members that lets them know their employer is a member and that gives them access to the tools and services offered with email sign up.

Consider sending a Welcome Pack to all current members.

TACTICAL RECOMMENDATION #7:

Create Value Packs for Members' Staff

Drive expanded awareness of the tools, services and resources the Chamber provides to the staff of members with:

1. Email Signup – within the Welcome email sent to new members, include a field form section where the member can input email addresses of its staff to be added to the Chamber's membership database.
2. Welcome Email for Staff – develop and send a customized Welcome email to the staff of members, driving awareness of the services available to them as a staff of a member and driving them to the portal to start accessing these services.
3. Mentorship Content – develop specific content and resources within the mentorship program for staff of members.

Once staff are added to the membership database via email, they are given access to the members portal website and become part of the membership engagement group.

Executional Considerations
1. Consider separate section on the members portal website specifically for the staff of members with content relevant to them

Tactical Action Steps

Below is a list of the next steps required to implement the recommendations within strategy 3:

1. Include content updates to drive value and sharing functionality as part of the members portal website update plan established out of strategy 1
2. Develop a plan to update the community-facing website homepage
3. Create execution plan for visually engaging content, including social media and traditional marketing materials, considering enlisting the support of local university and college students to develop content
4. Develop and implement email plan for members and staff, planning for segmented content and continuous learning from one email to the next
5. Create and implement frequency plan for one-on-one engagements
6. Design and produce Welcome Packs for members
7. Design and produce Value Pack for members' staff

Role of the Board
Drive awareness of the Chamber and the value it provides in communications and by sharing content on own digital and social platforms.

ADVOCACY

ADVOCACY STRATEGY #1:

DEFINE THE CHAMBER'S ROLE IN ADVOCACY

The Chamber is uniquely independently funded and has a clear and intimate understanding of the local impact decisions have on their members and the local business community, both of which can act as key points of differentiation when it comes to the advocacy value the Chamber provides. The Chamber uses its segmented membership learnings to identify core issues that are really making an impact on local businesses.

Role: **To provide a local, independent voice on key issues impacting our business community.**

Reasons-to-believe:
- The Chamber is 100% independently funded, making it the only local organization that can speak collectively and freely on behalf of members and the Greater Moncton business community
- The Chamber knows what is impacting its local members and its local business community and what type of support they require through its ongoing engagement and communication with members of both audiences

TACTICAL RECOMMENDATION #1:

Define Criteria for Advocacy

The Chamber's role is specific – to provide a local, independent voice on key issues impacting our business community – which means not every issues or topic is going to require advocacy support on behalf of the Chamber.

To determine which issues and topics require support, implement an Advocacy Criteria Matrix that asks a series of questions to define whether the support required is something the Chamber can provide and should provide.

Sample Advocacy Matrix Grid

Positive Factors	Very Positive (5)	Positive (4)	Neutral (3)	Negative (2)	Very Negative (1)	Negative Factors
Issue is important to our members and business community						Issue is not important to members and business community
Strategy is likely to benefit the health/wellness of our members and business community						Strategy is not likely to benefit the health/wellness of our members and business community

The Chamber has specific expertise in this area						The Chamber does not have specific expertise in this area
This area/topic has already been identified as a priority issue.						This area/topic has not yet been identified as a priority issue
The Chamber has the resources to undertake this activity.						The Chamber does not have the resources to undertake this activity.
The Chamber can identify a clear course of action that is compatible with its non-government funded status						The Chamber cannot identify a clear course of action that is compatible with its non-government funded status
Issue has broad support throughout the Chamber						Issue does not have broad support throughout the Chamber
Not participating will undermine the reputation or credibility of The Chamber						Participation will undermine the reputation or credibility of the Chamber
Our agency is supported by other organizations / partners						Our agency is not supported by other organizations / partners
Strategy is likely to have a positive effect on the financial resources of the Chamber						Strategy is likely to have a negative effect on the financial resources of The Chamber

Total the scores from all participating members. If the average score is:

- 10-25 – the Chamber may not be able to provide advocacy value
- 26-35 – consider whether the Chamber is the right organization to advocate on this issue with further input from additional Chamber stakeholders and potentially members
- 36-50 – the Chamber may provide advocacy value on this topic, move to the next two discussion points below:

1. Is any other organization or representative providing advocacy on this issue? If so, who?
2. What are the action steps to develop a plan for the Chamber to provide support in an ownable way, locally and independently?

At the Advocacy working group meetings, allocate time in the agenda to review any new potential issues or topics and fill out the Advocacy Criteria Matrix.

STRATEGY #1 DEFINE THE CHAMBER'S ROLE IN ADVOCACY:
Tactical Action Steps

Below is a list of the next steps required to implement the recommendations within strategy 1:

1. Update and align on Advocacy Matrix Grid
2. Implement use of Advocacy Matrix Grid in working group/committee meetings, considering dedicated time slot on meeting agenda

Role of the Board
Guide development of Advocacy Matrix Grid and the criteria in which advocacy issues will be defined.
Integrate Advocacy Matrix Grid outcomes into board meeting agendas.

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ADVOCACY STRATEGY #2:

COMMUNICATE THE ADVOCACY ROLE

Use the independently funded and local differentiators of the Chamber's advocacy as a selling feature of the Chamber in value-driven messaging, and on all messaging around advocacy services, ensuring the focus is on funding independence and not operational independence.

TACTICAL RECOMMENDATION #1:

Integrate the Chamber's Role in Advocacy into Communications

Increase the presence of messaging around advocacy in communications, including:

1. Member's portal website – consider separate section of site that drives awareness of the Chamber's involvement on key topics and the impact that involvement has had in the community
2. Emails - include as part of the visually engaging, value-driven content
3. Social platforms – include as part of the visually engaging, value-driven content

STRATEGY #2 COMMUNICATE THE ADVOCACY ROLE:

Tactical Action Steps

Below is a list of the next steps required to implement the recommendations within strategy 2:

1. Develop a plan to update the homepage of the members portal
2. Integrate advocacy messaging within execution of website, members portal, email and social content

Role of the Board
Drive awareness of the Chamber's advocacy role and the value it provides by sharing content on own digital and social platforms.

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COMMUNITY LEADERSHIP

COMMUNITY LEADERSHIP STRATEGY #1:
DEFINE THE CHAMBER'S ROLE AS A COMMUNITY LEADER

The Chamber is a leader in driving growth in the business community, and to both effectively lead and communicate this leadership and its impact on business growth, the leadership role the Chamber plays must be defined.

TACTICAL RECOMMENDATION #1:
Define the Leadership Role

Based on the value offerings the Chamber provides, it can act as a leader in many different aspects of the business community that affect growth:

- A leader in driving economic growth
- A leader in providing specific growth tools and services to members
- A leader in advocating on local issues and topics affecting the business community
- A leader in providing mentoring support
- A leader in providing and navigating relevant information
- A leader in connecting the business community
- A leader in public discussion on the issues and opportunities impacting the business community

STRATEGY #1 DEFINE THE CHAMBER'S ROLE AS A COMMUNITY LEADER:
Tactical Action Steps

Below is a list of the next steps required to implement the recommendations within strategy 1:

1. Update and align on defining list of leadership areas within the community
2. Review and update defining list at quarterly measurement meetings

Role of the Board
Represent the Chamber's different aspects of community leadership through actions and behaviours.

COMMUNITY LEADERSHIP STRATEGY #2:

COMMUNICATE THE LEADERSHIP ROLE

Reposition the current brand positioning from "inspiring growth" to **"Driving Growth"**, positioning the Chamber as an action-oriented organization that helps businesses in our community achieve growth.

TACTICAL RECOMMENDATION #1:

Convey Leadership in Communications

Integrate this brand positioning into communications to both members and the business community, driving the awareness and perception of the Chamber as a leader, including the following channels:

- Website and members portal website
- Emails
- In-person communications
- Social platforms
- Marketing and event materials

Keep in mind that the Chamber members are business community members as well – the communications delivered to them will have an impact on the Chamber's perception within the business community.

Executional Consideration:
- Consider introducing the positioning with a launch event, letting members and the community know what Driving Growth means an dhow they will see it brough tot life by the Chamber.

TACTICAL RECOMMENDATION #2:

Leverage the Board to Communicate Leadership

The Board of Directors for the Chamber is comprised of business leaders. Use their influence to drive awareness of the Chamber's leadership in the business community by:

- Showcasing Membership stickers at their business location
- Engaging with and sharing the Chamber's content
- Developing one digital piece of content per quarter for each board member that can be published by them to show their support of the Chamber

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STRATEGY #2 COMMUNICATE THE LEADERSHIP ROLE:

Tactical Action Steps

Below is a list of the next steps required to implement the recommendations within strategy 2:

1. Update brand positioning to Driving Growth in all communications touchpoints and materials
2. Develop execution plan for branded material and digital content for board members, considering enlisting the support of local university and college students to develop content

Role of the Board

Elevate the Chamber's positioning as growth drivers within the business community and enable the Chamber to execute on this positioning.

Drive awareness of the positioning by integrating it into Chamber communications and by sharing Chamber content on digital and social platforms.

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3-Year Roadmap

The grid below outlines the strategic pillars and tactics within each, with recommended timing based on the action-steps outlined in each strategy.

PILLAR	TACTIC		
	2021	2022	2023
Membership Value and Engagement	Clean up member database		
	Begin segmenting member database based on size	Continue segmenting member database	Continue segmenting member database
	Segment content for members based on size	Segment content for members using new segments	Segment content for members using new segments
	Implement segmented content, continuously measuring and adapting		
	Plan and research value-added offerings		
	Plan and execute Welcome and Value Packs		
	Test A/V equipment capabilities using new member videos as pilot project, using learnings for in-house studio	Fully launch in-house studio	
	Launch size-specific training and seminars	Launch sector-specific training and seminars	
	Develop owned digital and social channel implementation plan	Execute updates to members portal, website and social media channels, continuously measuring and adapting	
	Develop members portal update implementation plan		
	Test functionality of ChamberMaster for Business Navigator and Mentoring		
	Test demos of Mentoring and Live-Chat platforms if necessary		
	Develop implementation plan for Business Navigator and Mentorship Program		
		Pilot Business Navigator	Launch full offering
		Pilot of Mentorship Program	Launch full offering
	Develop Advocacy Matrix Grid		
	Implement Advocacy Matrix Grid		

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Advocacy	Integrate advocacy messaging into communications, continuously measuring and adapting		
Community Leadership	Align on repositioning of Driving Growth		
	Communicate repositioning with internal stakeholders		
	Integrate community leadership messaging into communications, continuously measuring and adapting		

Measurement Plan

DEVELOP AND IMPLEMENT A STRATEGIC MEASUREMENT PLAN

Develop a measurement plan that establishes key performance indicators (KPIs) and desired metrics per strategy and tactic actioned, outlining frequency of review and guidelines for identifying improvements.

You cannot manage what you don't measure. What gets measured gets done.
- Dr. Robert Cooper

Below are recommended KPIs for tactical recommendations within the plan:

Overall
- Increased member retention
- Member recruitment/growth of database
- Increased member satisfaction (via survey)

Members Portal Website
- Increased traffic to site
- Increased average session duration
- Multiple page visits
- Increased email signups
- Decreased bounce rate

Emails
- Increased open rate
- Increased click-to-open rate
- Increased click-through rate

In-Person and One-on-One
- Increased number of one-on-one member visitations
- Increased number and attendance of events, seminars and other engagements
- Positive feedback from post surveys

Tools & Services
- Overall use
- Member feedback
- More exact metrics are specific to exact offering

Communications
- Engagement

- Awareness
- Click-throughs
- Shares

TACTICAL RECOMMENDATION #1:
Implement Measurement Process

Establish and implement a measurement process defining the frequency of KPI and metric reviews, providing guidelines for future considerations and improvements, both for the strategies within the plan and the tactics executed as part of the plan.

Strategic Measurement Process
- Establish KPIs and metrics for strategies in ratified strategic plan in early 2021, assigning metric reporting for each strategy to relevant board member
- Conduct quarterly measurement workshop meetings with the board to review current KPIs and metrics, discuss learnings and determine next steps for improvements

Tactical Measurement Process
- Establish KPIs and metrics for tactics implemented coming out of strategic plan, assigning metric reporting to a staff member
- Quarterly analytics report – a detailed report outlining KPIs, desired metrics, performance, and future considerations recommendations, with the first report providing benchmarks for future metrics reporting
- Yearly analytics workshop – a working session with staff and any other relevant stakeholders to review the overall performance of the Chamber efforts against goals, working together to develop solutions and ideas for improvement. Within these workshops, use the Content Segmentation Grid to determine which segments require more and/or less communications.
- Training Consideration: educate the staff member who will be analyzing and reporting on the data on digital and social media measurement

TACTICAL RECOMMENDATION #2:
Partner with Member to Execute Regular Surveys

Develop partnership with research partner who is a member of the Chamber, such as Narrative Research, to complete regular digital surveys with members and business community members to gauge satisfaction, awareness, opportunities for improvement and more.

- Coordinate free membership and/or sponsorship package with partner
- Survey questions can be size and sector specific, in line with segments and provide insight as to what services and resources segments are looking for:
    - Member survey can focus on current and future value
    - Non-member survey can be focused on awareness, consideration and potential value
- Survey can be deployed to members and non-members, with customized questions for each
- At minimum, survey to be deployed annually

TACTICAL RECOMMENDATION #3:
Use Learnings to Improve Value

Put the data collected into action. Take the learnings from the established measurement plan and incorporate them into offerings and communications to improve value provided to members, including:

- Content on member portal website, emails and other owned communications channels
- Topics for seminars, workshops and training opportunities
- Ideas for resources, tools and services that can help address business needs

MEASUREMENT PLAN:
Tactical Action Steps

Below is a list of the next steps required to create and implement the measurement plan:

1. Establish strategic and tactical KPIs and metrics to be measured
2. Implement tracking measures and functionality
3. Develop training program and materials for analyzers of data
4. Set up infrastructure for ongoing measurement of results for strategic plan and tactics, including quarterly and yearly measurement workshops, assigning a lead from the Chamber staff to be responsible for compiling the data and preparing reports
5. Complete simple phone-call outreach to research partners, including Narrative, to determine interest in survey partnership, then execute with preferred member

Role of the Board
Establish metrics and measurement plan, including Board member responsibilities, for strategies outlined strategic plan. Include strategic plan metric review and discussion in Board meeting agenda on a quarterly basis.

Internal Governance

ENABLE THE CHAMBER TO DRIVE GROWTH

Encourage and enable effective implementation of the strategic plan by the Chamber board and staff by providing them with the support and tools required to execute the recommended tactics, and by leveraging their power to create value for the Chamber.

TACTICAL RECOMMENDATION #1:
Leverage Board's Leadership Strength

Both internally and externally, use the strength of the Chamber board's business and community leadership skills to elevate the role of the Chamber and the value it provides.

Internally, use the board to motivate and drive staff to execute on the strategic plan. Externally, use them to drive awareness of the Chamber's role in providing value to members, advocacy and community leadership.

TACTICAL RECOMMENDATION #2:
Educate and Train Internal Stakeholders

Develop a simplified, engaging version of the strategic plan to present to key stakeholders of the Chamber in separate in-person sessions:

- Staff
- Working Groups (Membership, Advocacy and Networking & Events)

Use these sessions to celebrate the achievements to date that their collected effort has led to and reignite enthusiasm and unite stakeholders in a common vision to drive growth, with defined tasks and outcomes related to the action steps within the plan.

For staff, given their day-to-day interactions with members and the community, the tools and services in which the Chamber offers, and the connectedness to measured results, quarterly sessions are recommended.

TACTICAL RECOMMENDATION #3:
Develop Engaging Educational and Training Content

Develop simple internal communications materials to act as reminders and sparks of inspiration that encourage stakeholders to do more to drive growth within the business community, including:

- One-page summary of plan, one per stakeholder group (including the board), customized to them – to be run through at the beginning of stakeholder meetings
  - Include checklist of goals and tasks, per roadmaps

- Welcome package for new board members that includes:
  - A full copy of the strategic plan
  - A mini portable version of the Chamber's mission and how it provides value and their role in driving growth
  - Board membership sticker

- Welcome package for new staff members that includes:
  - A mini portable version of the Chamber's mission, how it provides value and their role in driving growth
  - Staff swag such as shirts, water bottles, masks, etc.

- Welcome package for new committee members that includes:
  - A mini portable version of the Chamber's mission and how it provides value and their role in driving growth when it comes to their specific working group
  - Committee membership sticker

TACTICAL RECOMMENDATION #4:
Refocus Working Groups

Build on the success of the established working groups and their governance structure by refocusing the groups on the purpose of driving growth within their specific mandates and provide them with simple tools and resources that can help them achieve success (as described above in the previous recommendation Develop Engaging Educational and Training Content).

Refocused Working Group 1: Membership Committee
The primary focus of this working group is to enable members to drive growth and that growth is defined differently depending on the member and their needs. The Chamber represents a wide range of businesses, with this committee being attentive to the real needs of these businesses and the real value the Chamber currently provides and can provide to address these needs in the future.

Members are the backbone of the Chamber and it's critical that they are fully aware of how the Chamber not only helps their business today, but also helps set their business up for tomorrow, along with all businesses in the community. Part of the Committee's role is therefore to communicate this value to members.

Executional Recommendation:
Celebrating members can be an effective engagement tactic that drives retention and attracts new members. Consider developing digital and social content based on the success stories between the Chamber and members.

Refocused Working Group 2: Networking & Events Committee
The primary focus of this working group is to ensure that all major networking opportunities, including events, seminars, webinars and more, provide value to members and are reviewed on a regular basis to ensure they are well aligned to both the segmented needs of the members and the financial objectives of the Chamber.

Executional Recommendations:
- Implement the measurement survey recommended on pages 24-26 to determine the value provided to members via network opportunities and how to improve value moving forward
- Focus on rebuilding networking opportunities via mentorship program and virtual sessions with the Chamber studio recommended on pages 10-11 until in-person events are possible

Refocused Working Group 3: Advocacy Committee
The primary focus of this working group is to define their role on advocacy issues affecting the local business community using the Advocacy Criteria Matrix and develop a working plan to be a voice for members on the identified issues.

Each advocacy issue that it identifies as a focus for the Chamber will require a customized approach to become the voice for members. When an issue is identified, the Committee should hold a stand-alone meeting to discuss the approach and plan for that issue.

Executional Recommendations:
- Incorporate advocacy value-related messaging within content on website, members portal website, social content and other communications materials
- All communications should focus on a local voice that represents the real issues affecting our business community

INTERNAL GOVERNANCE
Tactical Action Steps

Below is a list of the next steps required to enable the Chamber to drive growth via internal governance:

1. Develop mini versions of the strategic plan and related inspirational materials for the stakeholder groups – board, staff and working groups, considering using a member partner or working with universities and colleges to complete materials
2. Set up meetings with each stakeholder group in early 2021 to officially launch the new strategic plan and share these materials
3. Ensure all meeting materials are updating to reflect the refocus of working groups to drive growth

Role of the Board
Drive the elevation of the role of the Chamber internally and externally, driving awareness externally and motivating internal teams to execute on the Chamber's potential to drive growth. .

CLOSING NOTES

To effectively deliver value to the business community and drive growth of our members, community and ultimately our province, is a big undertaking, and one the Chamber is currently poised to do. With its progress over the past three years and with consistent implementation of the strategic recommendations outlined in this plan over the next three years, the Chamber will drive growth in its membership value and engagement, leadership within the community, advocacy value and overall effectiveness at achieving its mission.

With strategic execution of this plan, by 2023, members will be able to answer the question "Why are you a member of the Chamber?" and the business community will be aware of the value the Chamber provides.

APPENDIX A: RETHINK FINDINGS

EXECUTIVE SUMMARY

As part of the ReThink process, discovery sessions, research analysis and comprehensive stakeholder engagement via one-on-one interviews and the virtual ThoughtExchange forum were used to pinpoint the true objectives, opportunities and barriers that would guide the development of the updated strategic plan.

Below is a summary of the key takeaways from this process:

- The strategic plan should act as a roadmap for the Chamber and its board and staff, outlining the guiding principles by which decisions will be made over the next 3 years
- The goal of the outcome of the implementation of the plan should be for members of the Chamber to be able to answer the question "Why are you a member of the Chamber?"
- Members have different needs and the Chamber provides different value to each depending on those needs – there's no "one size fits all" approach to value, it's specific to each business
- Access to relevant information and financial assistance is one of the key needs of members today
- Current members see the Chamber as an organization that supports their business, with strong leadership and attentive staff, however struggle to define the value the Chamber direct provides to their business

The following outlines the findings from this in-depth process, grouped by Internal Engagement Findings and Member and Non-Member Engagement Findings.

Internal Engagement Findings

The below are verbatims from an amalgamation of group face-to-face engagement sessions with the Chamber Executive, Board and Staff.

Discussion Point 1: The role of the strategic plan
- A roadmap for the Chamber
- A guiding document for the board and staff
- A document that provides focus and accountability
- A tool to turn from reactive planning to proactive
- To provide guidance for all internal stakeholders
- A guideline for the best ways to provide value to members
- To ensure the Chamber knows why they are doing what they're doing
- To define focus areas and priorities for the Chamber
- A document that unties Board and Staff members with a common vision

Discussion Point 2: The role of the Chamber
- A voice for the business community
- To represent small and medium businesses in our community
- To provide value for its members
- A business resource, providing businesses with the information they need
- To provide a community for small and medium businesses
- To create business opportunity in our region
- To be a leader on business issues
- To represent and to inform businesses
- To promote and celebrate our business community
- To represent "all things business" in our community
- To support and give back to the business community
- To provide networking opportunities within the community to its members

Discussion Point 3: Key Services Provided by the Chamber
- Networking opportunities within business community
- Advocacy that's independent of government
- Information provider
- Access to membership database/contacts
- Insurance benefits
- Certificate of origin for businesses
- Promotion within business community

Discussion Point 4: The biggest issue facing members
- Uncertainty and constant change
- Finding relevant and accurate information from the government, particularly pertaining to COVID-19 and business implications
- Economic survival

- Lack of customers given reduced foot traffic
- Retaining office culture
- Access to skilled workers
- Budget cuts and reduced staff
- Lack of time

Discussion Point 5: What Tools & Services Can Help Businesses?
- Easy access to and navigation of relevant information
- Access to business mentors
- A tool that showcases the business implications of COVID-19 regulations in an easy-to-understand way
- A way to quickly understand their specific business needs and deliver on them
- Digital business tools
- Efficient marketing support
- Member to member support and advice

RETHINK FINDINGS:
Member and Non-Member Engagement Findings

One-on-One Stakeholder Engagement
The one-on-one engagement highlighted that overall, the Chamber is seen in a positive light based on its strong leadership, presence within the business community and attentiveness of staff to small businesses. When asked about specific value provided by the Chamber, participants struggled to define this, however recognized they do provide value.

The below findings outline the questions that were asked to members and drooped members as part of one-on-one engagement calls, via a combination of video conference and phone calls, and the participants responses to those questions. The list of participants was inclusive of current and non-members representing various business sectors sizes, as well as regions throughout Greater Moncton, and included ten participants.

1. **What is the biggest challenge your business is facing today?**
- Uncertainty with constant change
- The time required to stay informed and updated
- Business survival
- Lack of cashflow
- Access to skilled workers
- Lack of information and direction as to what's available for business and financial support during COVID-19
- Lack of focus on innovation and growth given short-term COVID-19 focus

2. **What tools or resources would help you to address this challenge?**
- Specific information and resources relevant to my sector and business
- Help navigating information provided by government and community organizations

- A voice for small businesses to government – a unified voice
- Increased access to financial support and government programs
- Access to online selling tools and virtual programs
- Digital and social media tools training

3. What are the biggest barriers you face in accessing these tools/resources?
- Lack of time
- Lack of information
- Lack of financial support to afford paid tools and services

4. What's the biggest opportunity for your business/sector?
- Providing services and offerings online
- To find ways to help customers through COVID-19
- Staying on top of the latest technology trends
- To find a way to sustain cashflow in short-term to be successful in the long-term
- To stay update to date on what our customer need during COVID-19 and figuring out a way to get this to them
- A united voice for business in Greater Moncton – something to unite everyone

5. Does an organization like the Chamber provide any tools/resources that would address these needs? If so what?
- Information – the Chamber has been a great source of up-to-date information during COVID-19
- Learning sessions and events with peers
- Links to government resources
- Advice and direction on where to find resources

6. What value has the Chamber provided to your business since being a member?
- Overall support, helping small businesses find where they need to go
- Advice and direction on where to find resources
- Represents my businesses needs within the broader business community

7. Have you attended an event hosted by the Chamber? If so, which one(s)?
- All had added an event, including:
  - Business Excellence Awards
  - Breakfast Lunch n' Learn
  - Top 20 Under 40
  - Business After Hours

8. If the following services and products were offered virtually, would they help you solve your business need?
   a. Mentoring access to skilled business experts within your sector
   - Yes, as long as mentors are experienced in my specific sector and understand my specific business challenges
   - Yes, if the mentors could provide valuable advice for my business
   - If affordable and relevant, mentoring can help me

b. **Training and education specific to meeting your business needs**
   - Yes, again as long as its specific to my sector and my businesses, however finding the time may be challenging
   - Digital and virtual training opportunities on tools that can help my customers would be valuable
   - Yes, if the mentors could provide valuable advice for my business
   - If affordable and relevant, mentoring can help me

[For Dropped Members-Only]
9. Why are you no longer a member of the Chamber?
- Services seemed catered to small businesses and not as helpful for larger organizations
- Lack of regular communication

Online Member and Community Engagement

The online engagement was targeted at both members and the business community, with questions generic to the business sector not specifying that this engagement was on behalf of the Chamber. The findings highlighted the overall need for navigation of relevant information, virtual tools and services that can provide value to members' staff and customers, a local voice that represents the Greater Moncton business community and access to financial support that will drive long-term growth.

The below findings outline questions that were asked to the business community via the online engagement platform, ThoughtExchange, with up to 22 participants engaging with each question within the platform.

Question 1:

What is the biggest challenge your business is facing today?

- A shortage of supply and inventory availability due to COVID-19
- Managing cashflow
- Lack of access to government funding for initiatives that drive future business growth
- For newer businesses specifically, driving enough sales to sustain cashflow
- Lack of support for innovation
- Restrictions with in-person meetings affecting customer traffic and sales potential, in particular retail, restaurants and realtor sectors highlighted this
- Attracting new clients
- Transition and integration of work from home opportunities
- Finding quality talent
- All organizations shifting to virtual world, increasing competition
- Time
- Delay in manufacturing turnaround times affecting many aspects of operations

Question 2:

What tools or resources would help you address your business challenge?

- Increased access to financial support
- Access to up-to-date information and services that can deliver growth
- Navigation of the relevant resources and information available
- A means to advocate when government policies lack or inhibit our business growth, specifically for smaller, local businesses
- Increased government programs to help businesses grow

Question 3:

What's the biggest opportunity for your business/sector?

- Creating digital tools to deliver services with high quality
- A better way to take advantage of the government incentives available
- Uniting as a sector to achieve grow
- Establishing a path forward that keeps our sector healthy during COVID-19

Question 4:

What tools or resources would help you realize this opportunity?

- Short-term financial assistance
- Access to effective online tools and technologies at a low cost
- Relevant information for specific business challenges and needs
- A united voice that represents small, local businesses

Question 5:

What are the biggest barriers you face in accessing tools and resources that would support your business?

- Lack of time and resources given COVID-19
- Lack of access to the community leaders and decision-makers
- Decreased staff
- Uncertainty in long-term financial health inhibiting short-term spend

Question 6:

Do you have access to services and products that help you drive business growth?

- Access to digital marketing and advertising tools that drive growth, lack of resourcing impacting effectiveness
- Easy access to social media platforms

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Question 7:

> Coming out of COVID, what services or support will be most important for businesses in our region to remain sustainable and grow?

- A voice to represent the business community, specifically around the hard decisions and changes business owners have had to make because of the impact of COVID-19
- Access to the latest sector and community information, trends and data
- Services and tools that help businesses adapt to their new reality, such as best-in-class examples of work-from-home techniques
- Access to relevant funding and financial assistance opportunities
- Access to skilled workers