



Market Development Action Plan

2021-23

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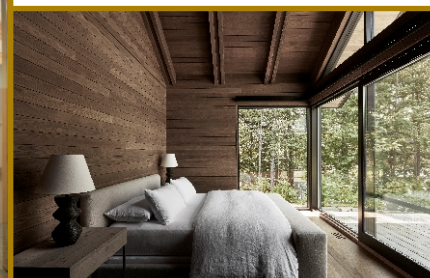


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This document is intended to provide an overview of the ideas and principles that will guide our efforts over the coming months as we launch a new marketing & communications structure.

It will be important to engage with our staff, members and associates across Canada in this process so that we can continue to evolve as an effective resource for the wood products industry. Through staff engagement, executive interviews and industry outreach, the CWC Market Development team will build on the current operating model, and introduce new opportunities designed to add strategic value for long-term success.

This Action Plan compliments - not replaces - the established CWC and Wood WORKS! strategic plans. It is a road map that charts a direction with a common goal - increase market profile, maintain leadership, and grow the industry on behalf of our members and partners. What you will NOT see in this Action Plan are specific deliverable targets, budgets, KPI's, etc. These will be developed over the coming months in collaboration with our staff and associates.

The information provided here is intended to solicit feedback from the reader. It outlines a new marketing & communications direction for CWC and Wood WORKS! that can adapt based on comments and perspectives from our member and partners. We welcome your insight and support as we work towards our goal.

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Foreword

This Market Development Action Plan represents exciting new marketing, communications and promotional objectives for Canada's wood products industry, and charts new directions for the first three years of CWC's Strategic Plan 2021-2025. This Plan builds on past successes and establishes important changes that will set the stage for new opportunities. The result is a dynamic direction that fully supports CWC's vision of an advanced and sustainable Canadian wood construction culture.

Kevin McKinley
President & CEO
Canadian **Wood** Council

Introduction

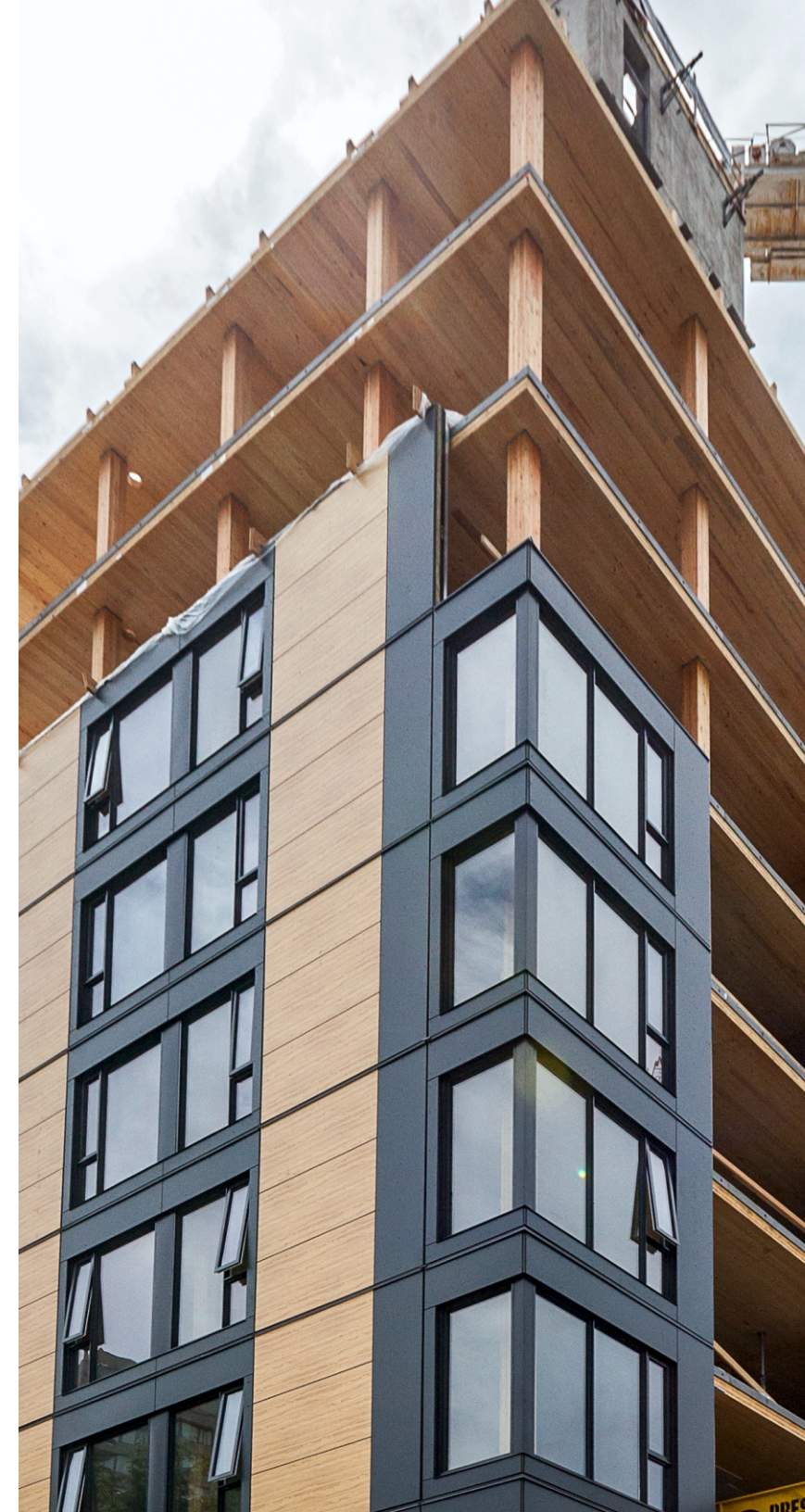
Recent trends in the global marketplace are demonstrating a growing commitment towards resource conservation, advanced wood technologies, climate change adaptation, and more. The Canadian Wood Council has an opportunity now to establish a reinvigorated leadership position in the marketplace by recognizing the opportunities within these trends, and create a targeted response strategy in support of our national objectives.

To help drive this opportunity, the CWC market development team as it exists today will evolve to become much more than just a program administration and communication centre; it will become a resource focused on high-profile market outreach and industry leadership. We will also work together to ensure a new level of support is in place for our highly-successful Wood WORKS! program. Together, we must grow our reputation as the central hub for the information, tools, and resources required by our members and partners as they strive to meet their business objectives and project performance goals.

We will look to develop a new strategy that is ready to promote the benefits of wood construction across sectors, while continuing to educate associates within the industry on the latest trends in technology. Over the coming years, we will prepare to offer a new suite of services in response to market demand, and we will develop the operational capacity required to respond quickly to shifts in market interests as they emerge.

These are exciting times for the CWC and our Wood WORKS! program, I am looking forward to the years ahead and the opportunity to create some exciting new projects with our exceptional team of professionals.

Andrew Bowerbank
Vice President, Market Development
- National Program Director, Wood WORKS!
Canadian **Wood** Council





Observations

What We are Doing Right

Since 1959, the Canadian Wood Council has been the trusted voice for the wood products industry in Canada. Our heritage and intimate knowledge of the sector have allowed us to build a breadth and depth of technical knowledge that is unrivalled.

Over the decades, economic and environmental conditions, as well as advancements in technology, have required the CWC and our Wood WORKS! program to adapt to changing conditions. With the recent surge in interest in mass timber technology, the CWC has done an amazing job (with the resources available) to maintain technical leadership and forge the public sector partnerships required to meet demand.

- ◊ The CWC is well positioned to maintain sector leadership in Canada
- ◊ We have passionate, experienced, and collaborative staff
- ◊ We have the depth and breadth of technical knowledge that the industry has come to rely on
- ◊ We are respected by our funders for management of our applications and reporting process
- ◊ We have strong, trusted relationships with our members and industry partners
- ◊ The measured success of our Wood WORKS! program has contributed to the adoption of a variety of new wood products and technologies; and our education programs have been highly successful at providing the resources needed by the Canadian design and construction sectors.

What Needs to Change

Any large company or association can find it difficult, for many reasons, to adapt quickly to changes in the market and competing interests. Now that the integration of wood products into Industrial, Commercial, and Institutional (ICI) buildings is going mainstream, the CWC will need to be mindful of:

1. New or smaller Not-for-Profits - without the project responsibilities, technical capabilities, or overhead burdens - trying to move in quickly for market share.
2. Public sector agencies - with funding offers designed to stimulate economic growth - restructuring their commitments and broadening their scope of influence.

The CWC's long standing leadership is its strength but it can also be its weakness if not kept in perspective. We cannot allow ourselves to succumb to a mindset that the legacy and achievements of an organization will automatically dictate respect from the marketplace; it is a trap that many long running agencies fall into.

To ensure we are always at the forefront of market and continue to provide best-in-class resources to our members and partners, we must now take the next step. At CWC and Wood WORKS!, it can no longer just be about sharing our breadth and depth of knowledge. We need to leverage our technical expertise by reaching across sectors for new partnerships and project opportunities that have the potential to stimulate greater demand for wood products.

- ◊ We need focused quality
- ◊ We need speed to market
- ◊ We need a louder, unified voice
- ◊ We need market impact.

Charting our Future Success

The following six objectives have been compiled through observations and discussions conducted with internal team members, partners, and leaders from across the industry. Each perspective provided has helped to shape a clear understanding of what is needed for CWC to not only maintain our position in the sector but grow and thrive as a market leading organization. These objectives will be used to keep us on track and focused as we build new opportunities over the coming years.

Prioritize Efforts

We need to identify what things we will focus on in the coming years, but we also need to identify the things we are prepared to change or stop doing. We need to search out the high-profile projects to apply our technical expertise, and then track accomplishments so that we can continue to find ways to improve. We also need to look for new partners from across sectors to help us share our story and identify new opportunities.

Streamline Communications

CWC will streamline marketing and communication efforts to allow us to move quickly in the market and celebrate our successes. We currently have so many things going on at once with little consideration about how we will promote our efforts to the marketplace. We need a detailed communications plan for EVERY project under development across the organization - supported by an appropriate budget - to elevate awareness and maintain leadership.

Program Alignment

Wood WORKS! must present a more consistent alignment with CWC in the market. We will work to establish a more predominant united front, and we will ensure Wood WORKS! is well recognized as the market leading technical program of the CWC. All communications and promotions will reflect these efforts - we will look bigger and prouder for it. Initiatives will include updated logos, a new series of market outreach strategies, and more.

Increase & Leverage Funding from Private Sector

A clear objective that will be outlined in greater detail over the coming months is the need to reduce Wood WORKS! dependency on government funding. A financial model is needed, supported by the private sector, that we can depend on to sustain ourselves with confidence. Many NGO's in the market have stories of how government funding had been cut unexpectedly leaving them without the financial base they had come to rely on to sustain their operations.

With the global economic/pandemic conditions we find ourselves in today, the CWC and our Wood WORKS! program will need to prepare for a potential worst-case scenario in the coming years. Government funding should be regarded as nice-to-have partnership for launching new initiatives; not a need-to-have requirement for maintaining long-term project viability.



Members/Partners First

The CWC is a national industry association. As such, we need to identify the projects and opportunities that will best support our members and partners. We need to develop a plan that places return-on-investment (ROI) as a priority for all projects and events. We must do our part to increase wood product sales and market demand but ROI does not always have to be about revenues. Many of our members and partners would benefit greatly from higher-profile marketing & communications, and a networking strategy that would elevate their leadership across the market. If we place ROI as a primary objective, our members and partners will see the direct benefits; CWC and Wood WORKS! would then be in a better position to ask for additional support in our efforts to augment the support we receive from our government funding partners.

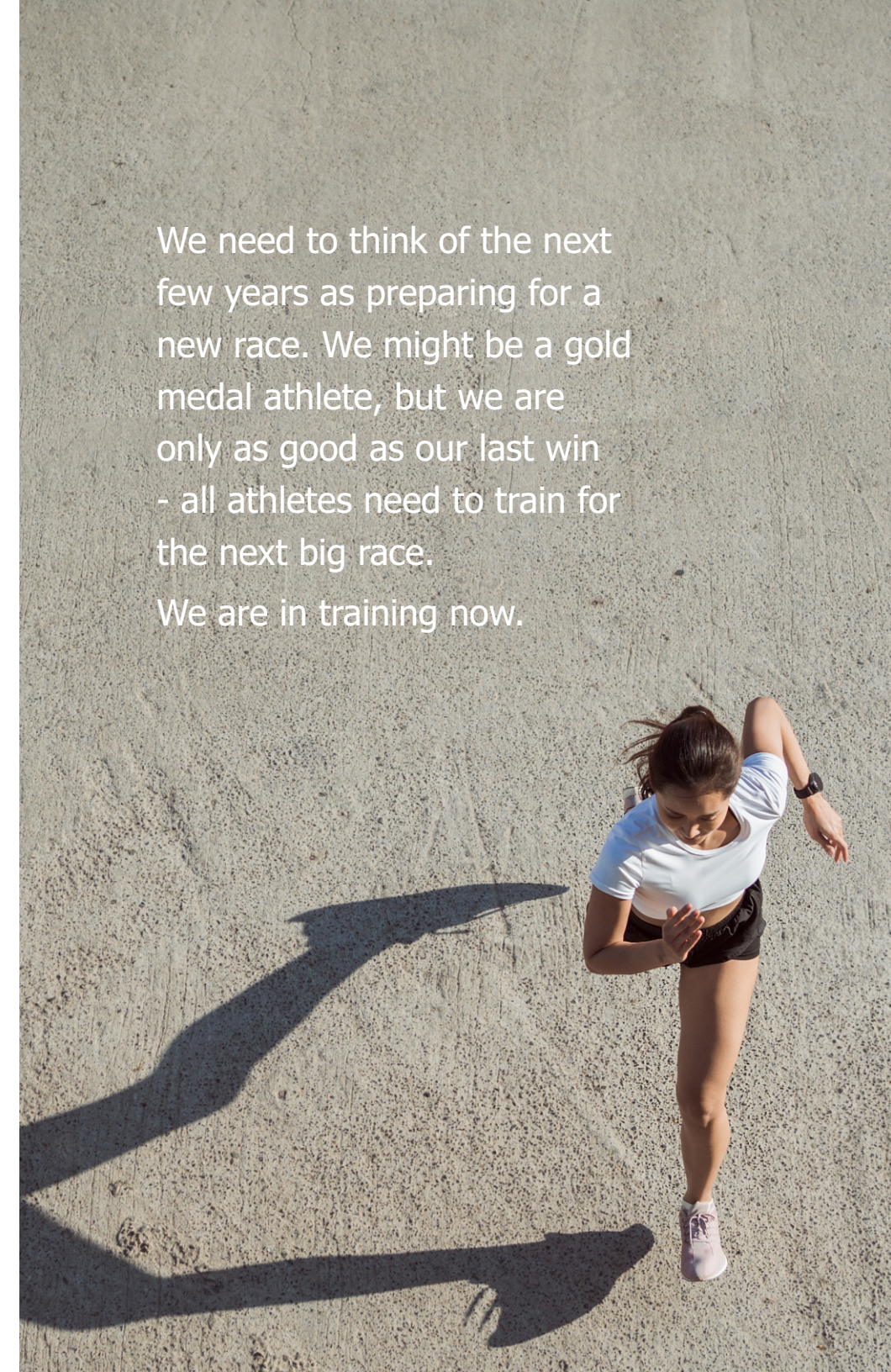
Emerging from Past Accomplishments

We have become reliant on our traditional way of conducting business in our effort to maintain market prominence; we create education and technical products that serve our membership and the industry with little need to reach across the marketplace for a larger audience. This has worked for us to date since we have been the go-to industry association in Canada, but it is a passive position that we need to address; it is a mind-set that opens the door for new parties to step in and take some of the market focus for their own interests.

Looking to future opportunities, we have amazing projects now under development that have the potential to transform the wood products industry, but unfortunately the scope on how to best promote these across the market has been limited to date. We can no longer rely on outlets like our website as the place for the market to go for information (too passive). Rather, we need to establish an aggressive outreach strategy to share our accomplishments; we need to bring our knowledge to the market and shout loudly about our efforts for all to hear.

We need to think of the next few years as preparing for a new race. We might be a gold medal athlete, but we are only as good as our last win - all athletes need to train for the next big race.

We are in training now.



Business Case: Exploring the Opportunities for CWC Leadership

Why should the Canadian Wood Council and our Wood WORKS! program be concerned about the latest shifts in market development and urban planning? Market interest in mass timber technology and wood products is on the rise; we are already well-recognized and doing a great job in developing the tools required by the industry to make informed decisions... right? Well, not so fast; let's take a look at what is really happening out there. What we need to ask ourselves is - how can the CWC keep ahead of the rapid pace of development? How do we more effectively share our insights and inform the market, through Wood WORKS!, about the opportunities that are emerging? And how do we ensure our proven industry leadership remains the trusted voice in the market? We owe it to our members and partners to continue to adapt and shift our focus so that we remain at the leading edge of technical innovation.

Moving from Trend to Mainstream

There is an established pattern in the market that trends tend to follow from “bleeding-edge”, to “leading-edge”, to market adoption. All systems and technologies follow this pattern; we can see evidence of this through the market interests in green buildings, electric vehicles, the internet-of-things, urban agriculture, and more. And now it is our turn as new innovations in wood products and systems make their way through this same development pattern. The caution for the CWC and Wood WORKS! is that once a trend starts to move to mainstream adoption there is a danger that we become overshadowed by new interest groups jostling for recognition. To maintain the leadership that we have worked so hard to establish since 1959, we need to embrace a new way of doing things. We need to unite with our industry partners to create new communication strategies that can best articulate to the market the tools and resources needed to drive change.

The Market Sector Needs to Grow

Now that new mass timber technologies are driving the trend in the commercial building space for wood products, the CWC will need to take on the responsibility of tipping the market trend from leading-edge, to mainstream adoption, on behalf of our members and partners. Where our partners need to remain focused on product development and supply chain management, the CWC must develop strategies for market growth.

We need to create the bigger “sand-box” for our industry partners to play in. When the market grows, everyone benefits.

Establishing a Leading Market Position

It's time to plant the flag. For too long, steel and (predominantly) concrete have been putting a lot of resources into discrediting commercial scale wood construction. The fact that they are doing this means they understand that the trend in ICI timber buildings is ready to tip to mainstream adoption.

The CWC should not play the same game as concrete and steel, but we do need to create a communications strategy that will put them on the defence; giving the wood products industry the chance it needs to establish an equal playing field. If the game is played fairly, the wood products industry will prevail.



CWC is the National Voice of Canada's Wood Products Industry

One of our greatest strengths is our breadth and depth of experience in the sector. As the only national industry association in Canada for wood products in the construction sector, we have a responsibility to represent the interests of our members and partners. We need to be the voice of leadership against the other product development industries and we must also be the storyteller for the innovative opportunities available to the market.

As we strive to find new opportunities for long term gains, we must always consider the return on investment to our members and industry partners. Where other groups may offer services focused on advocacy and market research; only CWC and our Wood WORKS! program have the practical technical knowledge sought after by the design and construction sectors.



Wood is the Only Renewable Resource in the Construction Sector

Embodied carbon is the latest performance metric that must be addressed if we are to get control of our climate crisis. Operational carbon (generated energy) has been the focus for the past 20 years but much more is needed if we are to meet the UN target for reducing global emissions by 80% by 2050.

The building and infrastructure sectors have recognized the path to reduce operational carbon through green building design, decentralized micro-grids and renewable energy systems. The resource sectors, including forestry and wood products will also need to identify the paths required to reduce GHG emissions by tracking the embedded carbon in the materials we produce and then offsetting the remaining.

One striking benefit that must be recognized is that wood is the only commercially available renewable material resource for the construction sector - no other manufactured product can make this claim. It will be a huge part of our story and a strategic opportunity for us to establish a truly circular economy for Canada. It will be our continued responsibility to work with our partners like the Forest Products Association of Canada to do our part in managing the world's second largest boreal forest and make an important contribution to our collective fight against climate change.

Innovation & Sustainability

Over the past few years, the market has begun embracing the notion that sustainable development and innovation need to be interconnected in order to facilitate change; it is a notion that is needed now more than ever. According to the United Nations Environmental Programme, we are on track for over 50 mega-cities on earth by 2050, each with populations exceeding 10 million; we have to ask ourselves - where are the resources coming from to meet the expected demand? Governments are striving to set policy and regulation to drive change; academia are doing what they can to educate societies - but it will take the combined effort of big industry players to ensure lasting change. Large companies like those in the wood products industry have the opportunity, and some say the responsibility, to lead by example; to invest in the technologies and products that will tip markets to a low carbon, circular economy. Our cities need to be resilient and adaptable to changing climates; the resources required to put in place the building, communication, and transportation infrastructure will need new conservation measures to manage appropriately.

To find the real solutions and prepare for a prosperous, low carbon economy, we require a new definition for sustainability; one that can respond to these new demands and prepare for a world with limited resources. This CWC Action Plan presents a new opportunity, one that is rooted in sustainability and innovation; it will provide CWC with the tools required to build on our existing expertise and lead the market over the coming years.

In Perspective: Defining our Primary Focus

Market Development Mission Statement

CWC will grow the market for the wood products industry in Canada in response to the latest trends and interests. We will accomplish this by adjusting our priorities, placing a greater emphasis on market awareness, cross-sector partnerships and member benefits. Our Codes & Engineering and Wood WORKS! teams will work together to identify new strategic opportunities and move quickly to offer the industry solutions required to meet demand.



It is the responsibility of the CWC to build a bigger “sandbox” for our members and partners to play in. If the market grows, the resources will be there to ensure long term economic prosperity.

Wood WORKS!

Our Wood WORKS! program is a highly successful and sought-after technical resource for the industry. More importantly, it is the only true industry run program of its kind in the country. In alignment with the CWC's Codes & Engineering team, we offer our members and partners a turn-key resource they cannot find anywhere else.

Where Do We Go From Here?

As market interest continues to intensify for wood products in the industrial, commercial, institutional (ICI) construction sector, we must be prepared to dedicate more resources to ensure we are able to respond quickly to demand. This will mean a restructure of our Wood WORKS! regional teams that will align effectively under a national directive; and it will mean a commitment to offering new services and opportunities to the industry for long-term success. We will need to work closely with our partners to better understand what tools we can provide to help them grow in an increasingly competitive marketplace; but we will also ask more from our partners to help ensure Wood WORKS! can continue to deliver the innovative, best-in-class solutions that they have come to expect.

A New Roadmap for Marketing & Communications

Currently, communication efforts are focused primarily around our events and education sessions. Much of this is due to the pandemic condition we find ourselves in, but we need to use this time of isolation to plan what activities we will do once restrictions are lifted. Going back to the way we used to do things is not the answer; It will be a new world after the pandemic, one that we can start to prepare for now. We need to look for new opportunities to shake things up and emerge as a vibrant, energetic association with a story to tell.

Our newly formed marketing & communications committee will work together over the coming months to present a roadmap for next steps. The CWC communications team will grow in response to industry interests and we will work closely with our members and partners to establish a unified message to the marketplace.

A Social Media Strategy

We need to think seriously about a renewed commitment to social media marketing. Our presence on the internet is quickly being overshadowed by other groups driving market awareness for mass timber and the greater wood products industry. Our current strategy is to promote activities on-line as they develop (events, publications, etc). This has resulted in an uncoordinated piecemeal response that is often too little too late; and far too dependant on product development. A primary focus of the communications roadmap mentioned above will be a social media strategy designed to greatly increase our presence on-line.



Preparing our Operations to Meet Market Demand

Stage One: 2021

For the past twenty years, the Wood WORKS! program and the CWC communications department were managed by Etienne Lalonde (ret). His oversight of these two groups resulted in a highly effective technical team that contributed in large part to the success of the CWC to date. Etienne will remain on hand as a contracted advisor through to March 2022.

The accomplishments of CWC and Wood WORKS! over the years are too numerous to outline here but there are two areas of focus that need to be reviewed for efficiencies:

1. Management of the promotional projects that provide quality resources to the marketplace, including:
 - i. Wood Design & Building Awards
 - ii. Wood Design & Building magazine
 - iii. Wood Design Awards book
 - iv. various national and regional conferences, events, & webinars
2. Management of the Wood WORKS! relationship with the funders that have made this program possible. Funding applications and reporting will need ongoing dedicated resources to meet expectations.

Stage One of the new CWC market development operations plan will focus on reviewing the needs of the departments that oversee the programs, budgets, and professional relationships.

We will begin by dividing the responsibilities that Etienne managed into two distinct teams:

1. Marketing & Communications
2. Technical Development

Two new Senior Manager positions will be appointed from within CWC to administer the day-to-day activities of the two teams and ensure objectives and outcomes are fulfilled on time and on budget. Finance and human resources at CWC will be called on to work with the Senior Managers to provide the training and resources required to support their long-term success.

NOTE: It is important to recognize that for Stage One, operations will be structured with minimal impact on the overall budget. For example, we have not replaced the outgoing Director of Communications; rather, mid-management staff will be reallocated from within CWC and Wood WORKS! to fulfill operational objectives.

We will also build our roster of consultants and agencies that are well established in the industry. We have begun the first steps in this process through two new partnerships focused on market outreach and carbon emission management respectively.

Committees

For the two new teams to function efficiently, a new internal committee structure will be established to support and advise development. These new committees will be expected to meet formally on a monthly basis to review activities, manage issues, and plan for future opportunities. Members of each committee are also expected to be on-hand on a regular basis to manage specific project requirements.

Stage One Benefits

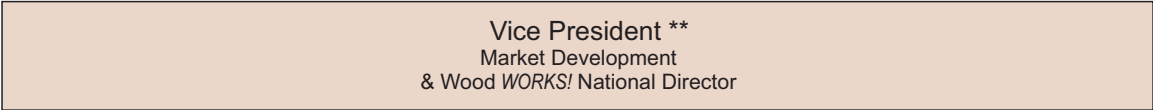
1. Operations will prepare for quick responses to shifting market interests
2. Allows for staff development and advancement to ensure long-term retention
3. National oversight gives clear direction for projects and communications
4. Committees build stronger internal communications and team work
5. Ability to give greater attention to a primary expectation of the Executive and the Board: Focus on market outreach strategies, networking, and CWC industry leadership.

Stage One: 2021

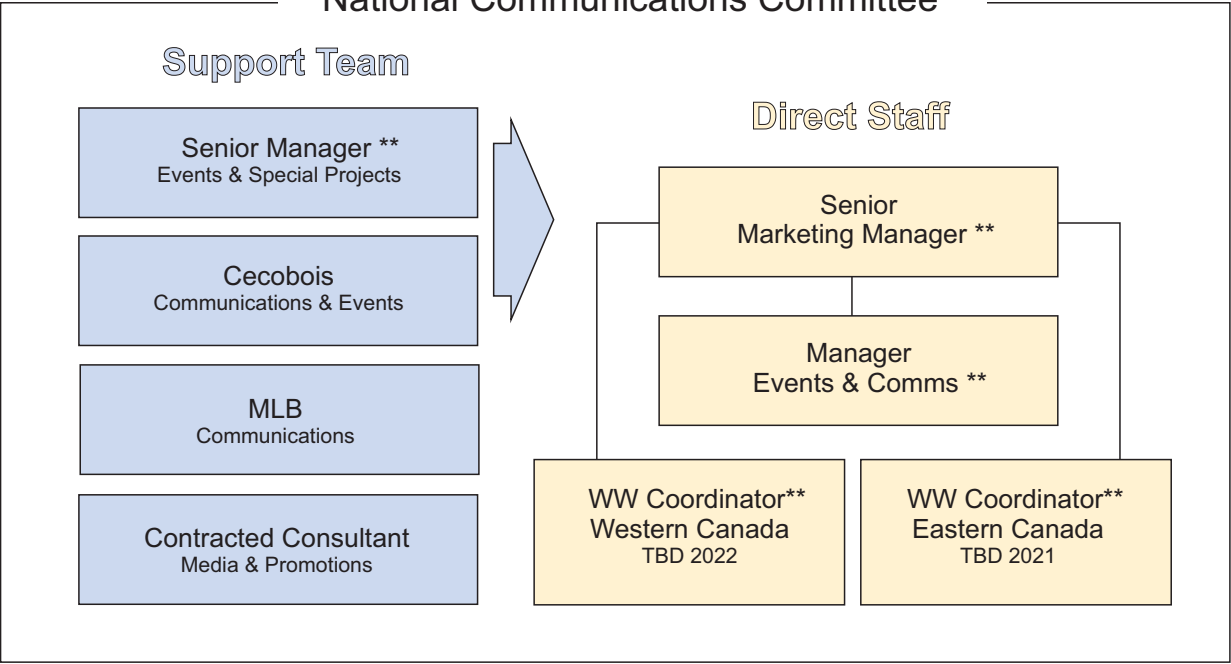
Focus National Objectives

Market Development Division

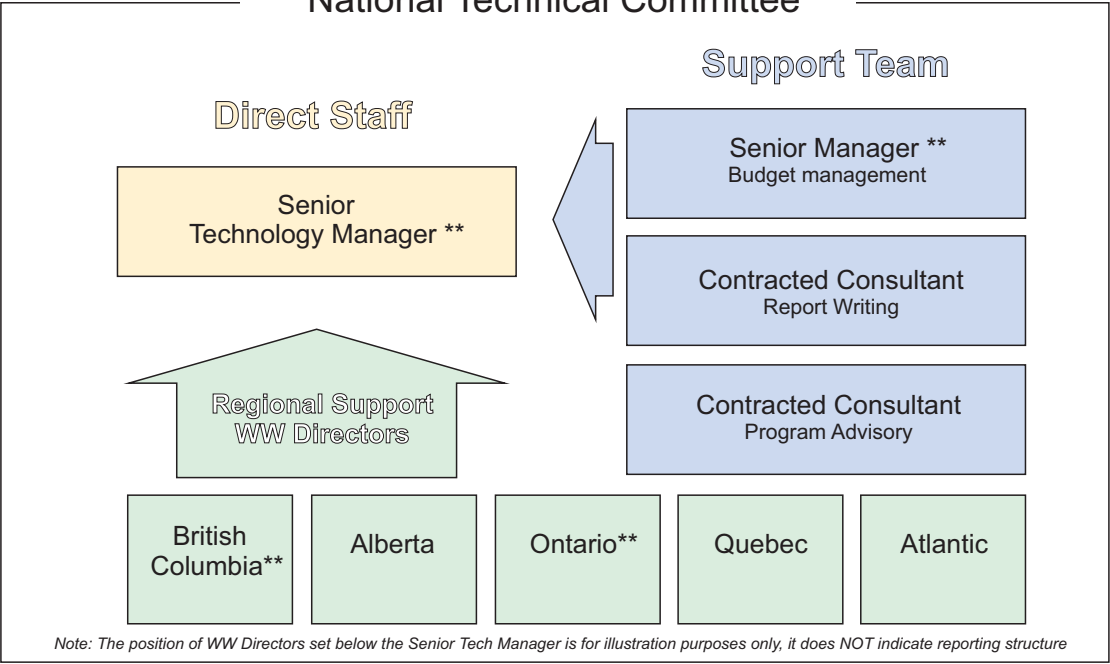
** Denotes full-time CWC/WW staff. Remaining are contractors or program partners.



National Communications Committee



National Technical Committee



Considerations for Future Development

Stage Two: 2022

We will strive to expand our operating capital through new project partners, industry funding, and more. To support our efforts, and keep on target with the scope of this Action Plan, we will consider building our communications team by adding resources that can focus on the unique needs of Canada’s Eastern and Western markets, and we will evaluate the workload requirements of the Wood WORKS! technical team in response to project demand.

Stage Three: 2023

It is expected that by 2023 the leadership presence of CWC in the market will be undeniable. As such, we will revisit and update the objectives of this Action Plan to ensure we maintain our trajectory of influence. The objective will not be about size and scale of our teams but about quality of work and positive experiences. We will build the capabilities of our employees by supporting training in-line with interests and talents; we will look to build a roster of

public speakers that can represent CWC and Wood WORKS!; we will Establish an emerging leaders initiative that will nurture and grow careers; and we will build on our technical excellence to ensure our partners have access to the latest information.

We are at an exciting time at CWC! When we work together towards the objectives outlined in this Plan, we will stand out in the market by becoming greater than the sum of our parts.

Delivering on our Plan: Projects Preparing to Make an Impact

The CWC and our Wood WORKS! program have amazing projects and events under development. Each of these are market leading and set to make a dramatic impact. As discussed previously in this Plan, we will be developing a communications strategy for each one - and it will be a requirement for all projects going forward to ensure we are well recognised and celebrated for our ground-breaking work.

The following list of project highlights provide a snapshot of the amazing work our teams will continue to develop over the coming months. They are brought forward here not to represent the most important projects under development rather, they represent the projects that have the greatest potential for high-profile commercial impact. Over the coming months, in addition to adopting a communications plan, each project will be reviewed to ensure they are in-line with our latest strategy.

Existing Projects

Technical Advisory & Publications

Our technical expertise is highly sought after in the industry; our Wood WORKS! teams participate in project development including design and construction advisory services. Our Codes & Engineering team also produces a number of well-respected publications. The Wood Design Manual is perhaps the most important. It provides practitioners with essential information for the engineering design of structural wood products.

Wood Design & Building Awards

The Awards program recognizes and celebrates the outstanding work of visionaries around the world who inspire excellence in wood architecture. The CWC has been hosting the national and regional awards program annually for the past 36 years.

Wood Design Awards Book

This award-winning book showcases unique and inspirational projects from the Wood Design Awards Programs. This coveted publication is designed to inspire the industry and explore the realm of possibilities in wood construction.

Wood Design & Building Magazine

The magazine is an award-winning publication that is exclusively about wood use in architecture and construction. The only magazine in the market of its kind - with a total subscription-based audience of over 65,000 - it is a valuable resource for architects, engineers and custom builders across North America.

Projects in Production

Low-Rise Commercial Wood Buildings Book

Our national team of experts has produced a guide that showcases a total of six innovative design templates for low-rise commercial projects intended specifically for the Canadian market. Project examples include light wood-frame, heavy timber, mass timber and hybrid construction solutions, all designed to help build proficiency and confidence in using wood in this previously untapped sector of the construction market.

Tall Wood Cost Comparison Study

An eleven storey mass timber residential building is being designed in BC with the identical footprint of an existing concrete building just finishing construction. Both buildings will have Class C cost estimates completed.

Continued →

WoodSMART Education Roadmap

The WoodSMART program is leading the effort to expand wood design and construction education in Canadian colleges and universities. Through engagement with educators, we are creating technical resources based on market needs, and increasing student awareness of career opportunities. Our goal is to influence future practitioners and help increase the use of wood in construction.

Insurance Industry Initiative

The method by which timber frame builder's risk insurance is determined has resulted in significantly higher rates for insuring the course of construction of large wood buildings. The CWC is working to address this difference in rates and educate the insurance industry on the safety of modern products.

Mass Timber Fire Test Demo Project

The Mass Timber Fire Test is a partnership project designed to support the approval of tall and large mass timber buildings in Canada. A series of fire tests will be conducted to address concerns, and accelerate the adoption of mass timber products in ICI buildings.

Timber Bridge Best Practices

The timber bridge research project outlines best practices for the design of timber bridges. The project reviews the properties of wood products and their benefits, proper maintenance techniques, and the state of the timber bridge industry in Atlantic Canada.

Gestimat

Gestimat is a new innovative on-line tool designed by Cecobois in Quebec to quantify, analyze and compare the carbon footprint of materials in construction projects. Gestimat will allow the comparison of GHGs for building structures constructed with different materials (wood, steel and concrete), providing developers and designers with the tools they need to make informed decisions for their building projects.

Mid-rise Construction & Design Guide

Extensive consultations and focus groups were conducted across Canada in 2020 to assess the mid-rise market variances. As a result, a new and enhanced Mid-rise Construction & Design guide will be published to define code variations nationally and highlight the business case made for wood use in mid-rise applications.

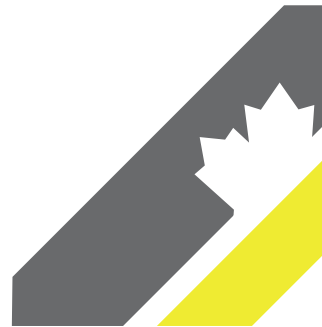
New Projects Under Development

Mass Timber Industry Roundtable

The proposed Roundtable will be launched as a private sector forum to help expand the market, build greater awareness, and develop new strategic opportunities for commercial wood construction. Through two annual sessions, we will bring together a select group of industry leaders from the design and construction sectors to address our most pressing challenges and increase awareness across the marketplace.

Carbon Offset Strategy

The CWC will leverage the leadership of our members and partners to access new economic and environmental opportunities through a comprehensive carbon market strategy. We will be working with Radicle - an award-winning Alberta based company - to structure a business engagement plan as a roadmap for CWC's commitments on climate change. Together, we will identify carbon market eligible activities and credit generation opportunities, explore product service offerings, and plan communication strategies to disseminate the CWC/Wood WORKS! sustainability story.



Canadian Wood Council
Conseil canadien du bois

