

CWA SUMMIT

INDOOR CLIMBING CONFERENCE
MAY 17-19, 2023 | PITTSBURGH, PA

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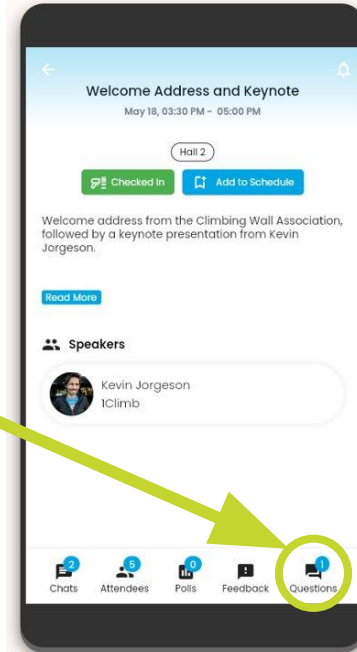


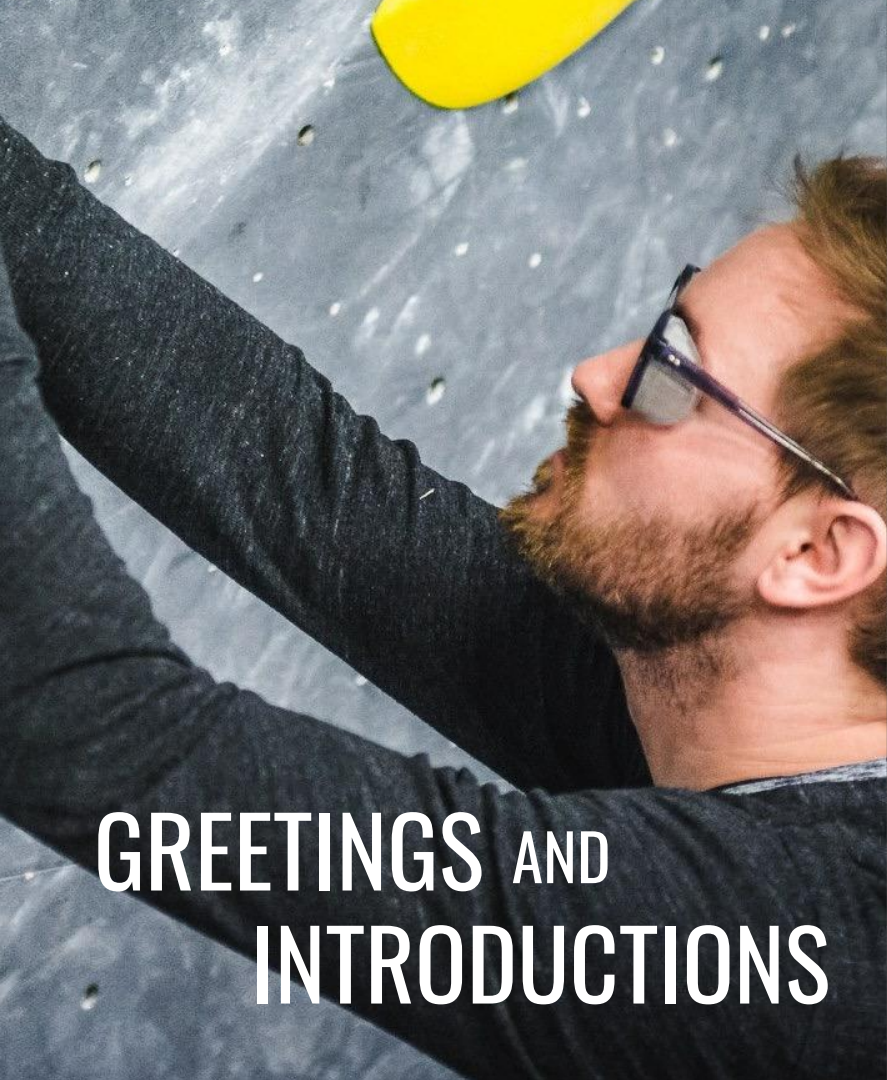
**Executives || Managers/Directors ||
Owners || Routesetters**

LEARNING OBJECTIVES

- **PROVIDE CONCRETE TOOLS FOR BUILDING A GROUND-UP ROUTESETTING PROGRAM IN A BRAND NEW GYM WHILE DEVELOPING STRATEGIES TO PLAN FUTURE NEEDS OF THE DEPARTMENT AS IT EXPANDS**
- **INFRASTRUCTURE TRIAGE: HOW TO APPROACH CREATING POLICY, DOCUMENTATION, AND TRAINING**
- **EXPLORE THE COMPLEXITY OF CREATING AN INTEGRATED ROUTESETTING DEPARTMENT THAT SUPPORTS ALL ASPECTS OF A CLIMBING GYM ECOSYSTEM FROM OUTDOOR ENTHUSIASTS TO COMPETITIVE ATHLETES.**

**Have questions?
Submit them in
the Questions tool
on the CWA App!**





GREETINGS AND INTRODUCTIONS



GET TO KNOW THE PRESENTERS



JUSTIN WRIGHT  **EDGEWORKS**
CLIMBING + FITNESS

- Director of Routesetting
15 years of climbing industry experience
- Developed SOP and Rescue plans for gyms across the country.



FOXMAN McCARTHY-JAMES

- Head Setter for Alta Climbing and Fitness
- Background in Education and Performance
- Instructed womxns routesetting clinics across the country.



WE BUILT VORTEX TO...

- TRACK INDUSTRY TRENDS
- ADVOCATE FOR PROFESSIONALISM AND STANDARDIZATION IN THE CLIMBING INDUSTRY
- HELP OWNERS BUILD AND RETAIN TOP LEVEL TEAMS

[LINK TO OUR ROUTESETTING DATA PROJECT](#)



Routesetting Industry Data Presentation, CWA Summit 2022

SUPPORT THE PROJECT BY CONNECTING WITH US AFTER THE PRESENTATION

CWASUMMIT

BUILDING A ROUTESETTING PROGRAM

POWERED BY:





PART 1: Building from Scratch

WHERE
DO I
START



ROUTESETTING INFRASTRUCTURE TRIAGE

- WHAT IS YOUR ROLE?
- WHAT IS THE TIMELINE?
- DO YOU HAVE A TEAM?
- DO YOU HAVE HOLDS?
- DO YOU HAVE A HOLD ROOM?
- DO YOU HAVE TOOLS?
- DO YOU HAVE EQUIPMENT?
- DO YOU HAVE A PLAN?
- WHAT ARE YOUR PRIORITIES?



PRIORITIES



1.

2.

3.

GETTING EVERYONE ON THE SAME PAGE

DIFFERENT PARTIES WILL HAVE DIFFERENT PRIORITIES:

- **OWNERS:**
- **GENERAL MANAGER:**
- **HEAD SETTER:**
- **HEAD COACH:**
- **PROGRAM MANAGER:**

COMMUNICATION IS KEY!

- **FIND AN APPROPRIATE CADENCE:**
 - **AT WHAT INTERVAL SHOULD YOU MEET, AND WHAT HAPPENS IF SOMETHING UNEXPECTED COMES UP?**
- **WORK OUT COMMUNICATION STYLES EARLY!**

WHAT DO YOU NEED, WHEN DO YOU NEED IT?

WHAT DO YOU NEED IN ORDER TO OPEN YOUR DOORS TO THE PUBLIC?

- A ROUTESSETTING TEAM
- OPENING SET
- HOLD ROOM // STORAGE
- A PLAN FOR ROUTE TURNOVER

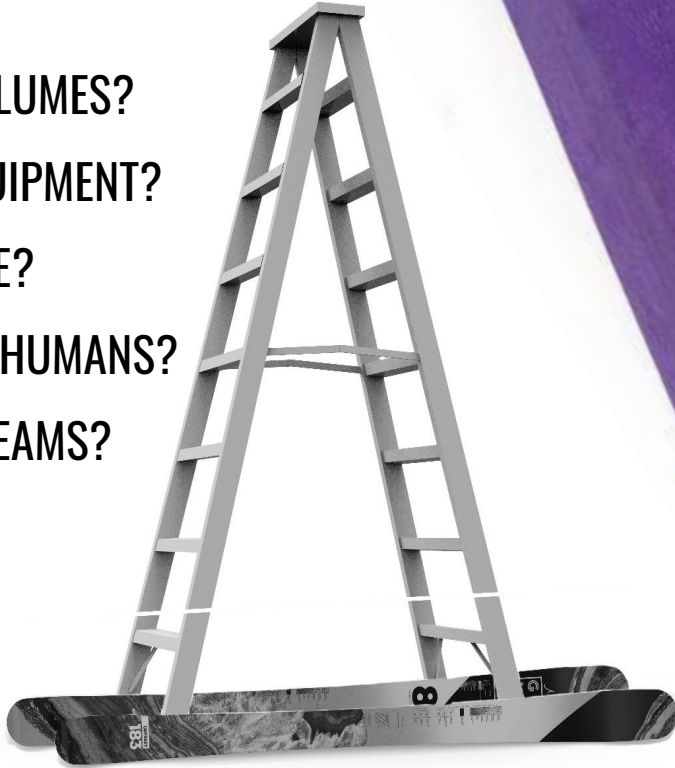
WHAT WILL THE PUBLIC EXPECT IN THE FIRST 3 MONTHS? 6 MONTHS?

- GRAND OPENING
- EVENTS
- TURNOVER
- PROGRAMS

WHAT TOOLS, RESOURCES, AND INFRASTRUCTURES DO YOU NEED TO MEET THESE GOALS?

WHAT RESOURCES DO YOU ALREADY HAVE?

HOLDS AND VOLUMES?
TOOLS AND EQUIPMENT?
STORAGE SPACE?
ROUTESETTING HUMANS?
HOPES AND DREAMS?



HOLDS // VOLUMES



HOLDS AND VOLUMES

- WHAT IS THE BUDGET?
- HOW MANY COLORS?
- WHAT COLORS DO I CHOOSE?
- JUGS AND FEET PERCENTAGES
- FIBERGLASS MACROS AND VOLUMES
- COORDINATING SHIPMENTS / DELIVERY
- WHERE DO YOU PUT THEM DURING CONSTRUCTION?



OPENING SET AND LOGISTICS

ORDERING HOLDS AND VOLUMES?

- NEED HELP? THERE ARE MANY CONSULTING COMPANIES THAT CAN ASSIST YOU
- MAKE SURE YOU ORDER ENOUGH FOR THE DENSITY YOU WANT
- PLUS PLENTY OF EXTRAS FOR BACKSTOCK!
- THINK ABOUT BANKING SOME OF THE BUDGET FOR LAST MINUTE ADJUSTMENTS ONCE YOU ARE OPEN

OPENING SET LOGISTICS: WORKING AROUND CONSTRUCTION ZONES

- CONSTRUCTION TIMELINES CHANGE. BE FLEXIBLE
- SETTING OUT OF CARDBOARD BOXES
- CREATE A SYSTEM // PLAN OUT AS MUCH AS POSSIBLE
- STASH TWEAK HOLDS FOR FORERUNNING ONCE CONSTRUCTION ENDS



TOOLS FOR THE JOB

WHAT TOOLS DO ROUTESETTERS NEED TO DO THEIR DAY-TO-DAY WORK?

- SETTING KITS
- PPE AND RISK MITIGATION STRATEGIES
- ACCESS METHODS

PREPARE FOR THE UNEXPECTED

- HOME DEPOT TRIPS: DO YOU HAVE A TRUCK?
- WALL MAINTENANCE HICCUPS: METRIC BITS, ETC.

TOOL TRIAGE FOR A BUDGET:

WHAT DO YOU NEED NOW, WHAT CAN YOU WAIT FOR?

- YOU NEED IMPACTS
- DO YOU NEED THAT ANGLE GRINDER TODAY?



IS YOUR GYM A ROPE GYM? ARE YOU PLANNING TO ADHERE TO CWA WAH STANDARDS?

- IF SO, CONSIDER GETTING YOUR TEAM CERTIFIED

WILL YOU HAVE A LIFT?

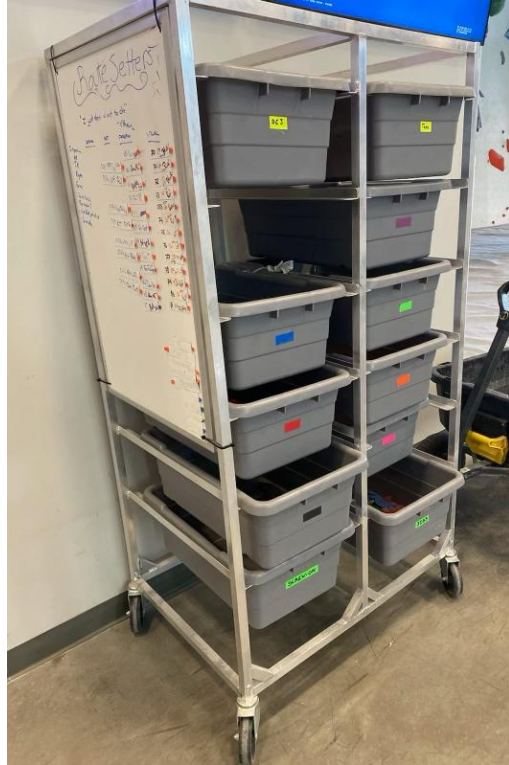
- THIS CAN MAKE A HUGE IMPACT IN REDUCING THE PHYSICAL LOAD OF THE ROUTESSETTING TEAM AND HELP MAXIMIZE EFFICIENCY IN STEEP TERRAIN
- AERIAL LIFT CERTIFICATION AND TRAINING
- WHERE WILL YOU STORE THE LIFT WHEN IT'S NOT IN USE?

ROPE ROUTESSETTING KITS

- EITHER WAY, YOU WILL STILL NEED EQUIPMENT
- THE CBJ HAS AN ARTICLE THAT OUTLINES ROPE SETTING ESSENTIALS IF YOU NEED A REFERENCE.



TOOLS FOR THE JOB



THE HOLD ROOM



THE SPACE YOU HAVE, THE SPACE YOU NEED

HOLD STORAGE

- **DON'T UNDERESTIMATE THE SPACE YOU'LL NEED!**
- **MAKE IT USER-FRIENDLY**
- **PLAN FOR LADDERS**
- **THINK ABOUT ERGONOMICS AND SMART LIFTING**
- **WHAT OTHER EQUIPMENT DO YOU NEED TO STORE?**

HOW DO YOU DECIDE HOW TO SORT HOLDS?

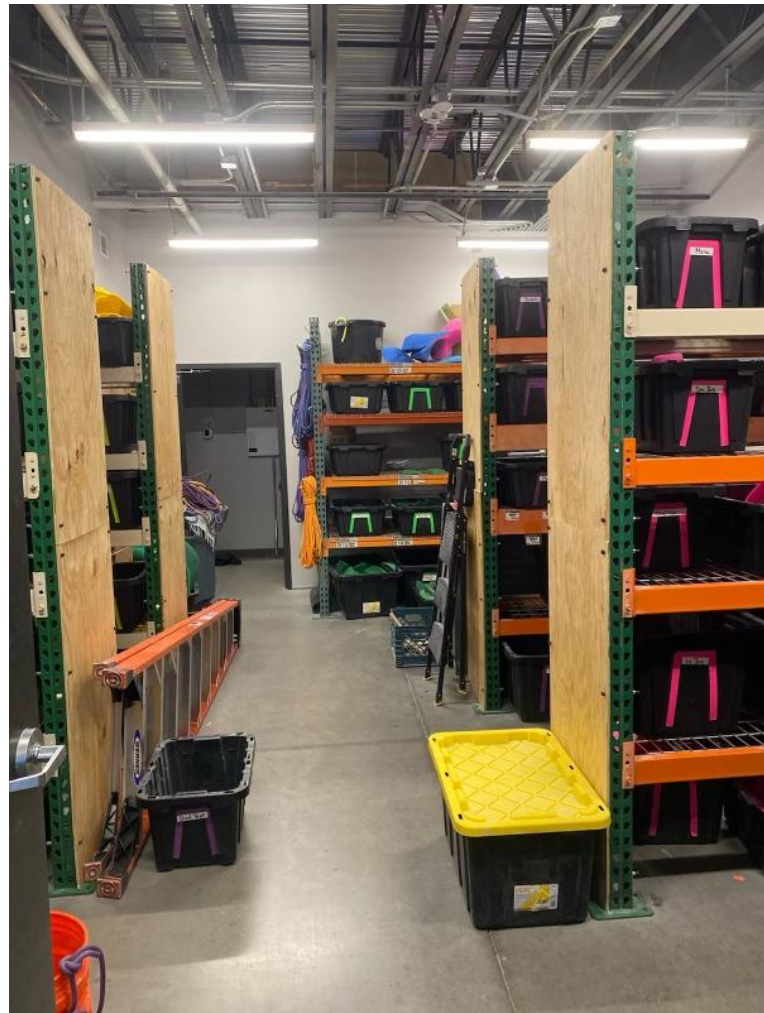
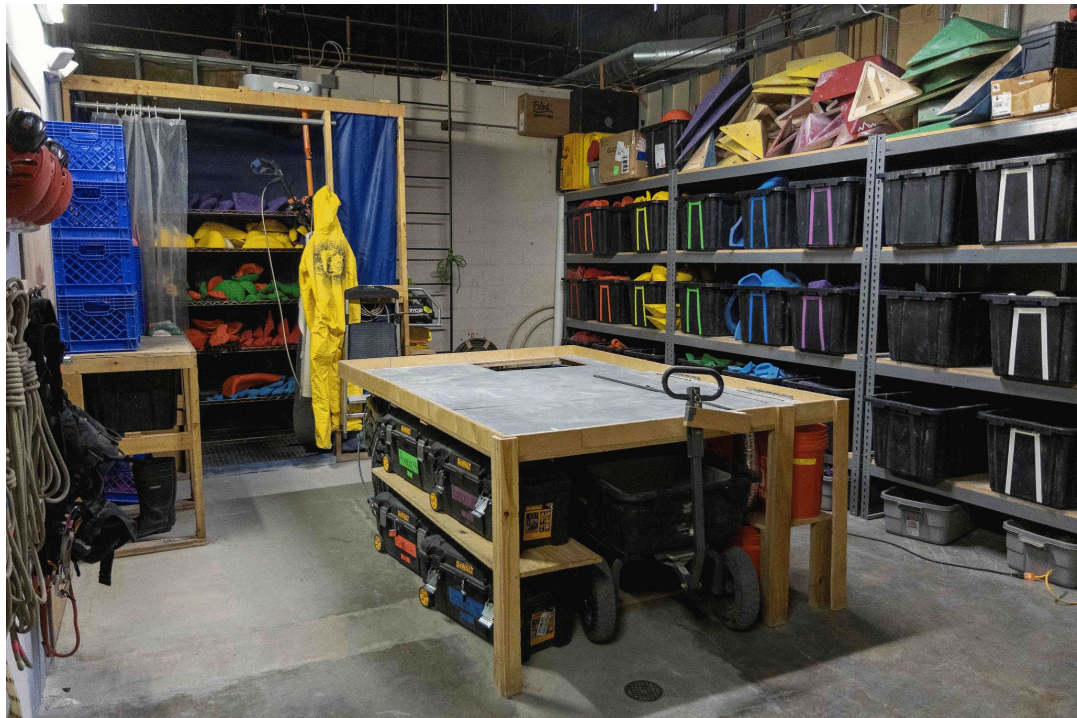
- **EASE OF WORKFLOW SHOULD BE THE PRIORITY!**
- **WHAT WORKS WELL FOR YOU MIGHT NOT WORK WELL FOR YOUR TEAM. BE FLEXIBLE!**

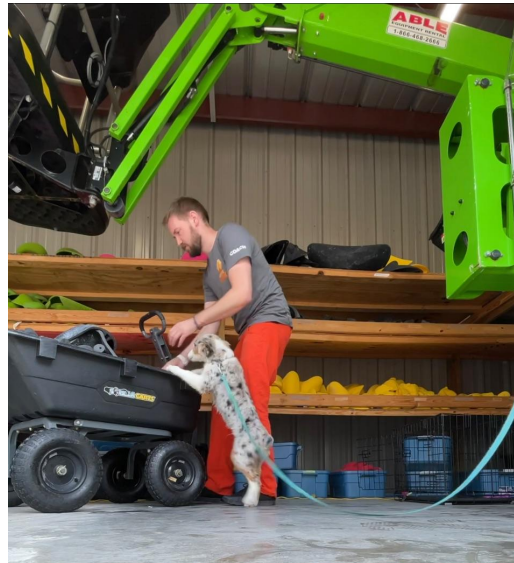


EFFICIENT HOLD ROOM = \$\$\$\$\$\$









LESS GLAMOROUS SPACES

DESIGNING A HOLD WASHING PROTOCOL

- ARE YOU DESIGNING FROM SCRATCH, OR DO YOU NEED TO WORK WITHIN AN EXISTING SPACE?
- HOW ARE YOU PLANNING TO WASH THE HOLDS?
 - DISHWASHER
 - POWERWASHER
 - SCRUBBING
- WHAT VOLUME OF HOLDS WILL YOUR TEAM NEED TO WASH, AND HOW BIG ARE THEY?

ADDITIONAL FACTORS

- IS CLIMATE A FACTOR IN YOUR HOLD WASHING DECISIONS?
- HOW FAR IS YOUR HOLD WASHING SPACE FROM THE SETTING FLOOR OR HOLD ROOM, AND HOW ARE YOU TRANSPORTING HOLDS?



**HOLD WASHING IS IMPORTANT.
DON'T SKIMP.**



BUILDING A TEAM



BUILDING A ROUTESETTING TEAM

FOSTERING A CULTURE THAT REFLECTS YOUR GYM'S VALUES...

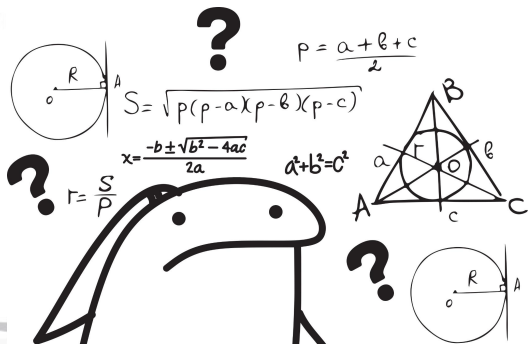
- **FINDING ROUTESETTERS WHO ALIGN WITH THE GYMS GOALS AND CORE VALUES**
- **BUILDING A TEAM THAT WORKS WELL TOGETHER OPTIMIZES EFFICIENCY, RETENTION, AND PRODUCT QUALITY**

...WHILE FUNCTIONING WITHIN LOGISTICAL CONSTRICTIONS

- **VOLUME AND TURNOVER ARE DIRECTLY RELATED TO THE SIZE AND TALENT OF THE ROUTESETTING TEAM**
- **WHAT SIZE TEAM DOES YOUR GYM NEED TO ACHIEVE TARGET DENSITY AND TURNOVER? WHAT SIZE TEAM CAN YOUR GYM SUSTAIN?**

HOW MANY PEOPLE DO YOU NEED?

- WHAT IS YOUR TARGET TURNOVER?
- WHAT IS YOUR TARGET DENSITY?
- HOW MANY DAYS A WEEK WILL YOUR TEAM BE SETTING?



DO MATH



INTERVIEW TO FIND THE RIGHT PEOPLE

CREATE AN INTERVIEW PROCESS THAT TESTS MORE THAN STRENGTH

- **DESIGN QUESTIONS THAT CHALLENGE:**
 - **COMMUNICATION,**
 - **PROBLEM SOLVING,**
 - **AND EMPATHY**
- **ASK CANDIDATES ABOUT THEIR VALUES**

WORKING INTERVIEWS AND TEAM DEBRIEFS

- **SEE HOW A CANDIDATE WORKS WITH YOUR TEAM**
- **AFTER ANY WORKING INTERVIEW, DEBRIEF WITH THE TEAM TO HEAR THEIR OPINION.**
- **DON'T RUSH INTO HIRING A CANDIDATE WHO ISN'T A GOOD FIT FOR THE TEAM**



DOCUMENTATION AND INFRASTRUCTURE

INFRASTRUCTURE FOR EASE OF WORKFLOW

- **DISTRIBUTION: HOW ARE YOU TRACKING WHAT YOU HAVE AND WHAT YOU NEED?**
- **DAILY WORKFLOW:**
 - **WHITEBOARD?**
 - **EMAILED ASSIGNMENTS?**
 - **3RD PARTY ROUTESSETTING APP?**

INFRASTRUCTURE FOR LIABILITY

- **DO YOU HAVE AUTOBELAYS THAT NEED TO BE INSPECTED?**
- **ROPES OR PADS THAT NEED MAINTENANCE?**
- **ARE YOUR ROUTESSETTING WORKPLACE RISK MANAGEMENT PROTOCOLS ESTABLISHED?**

INFRASTRUCTURE FOR STAFF TRAINING

- **GET A BASIC PLAN UP AND RUNNING**
- **EXPAND UPON IT WHEN THERE'S TIME**



#TROUTSETTING



QUESTIONS?



PART 2: EXPANDING BEYOND

EXPANDING THE OPERATION

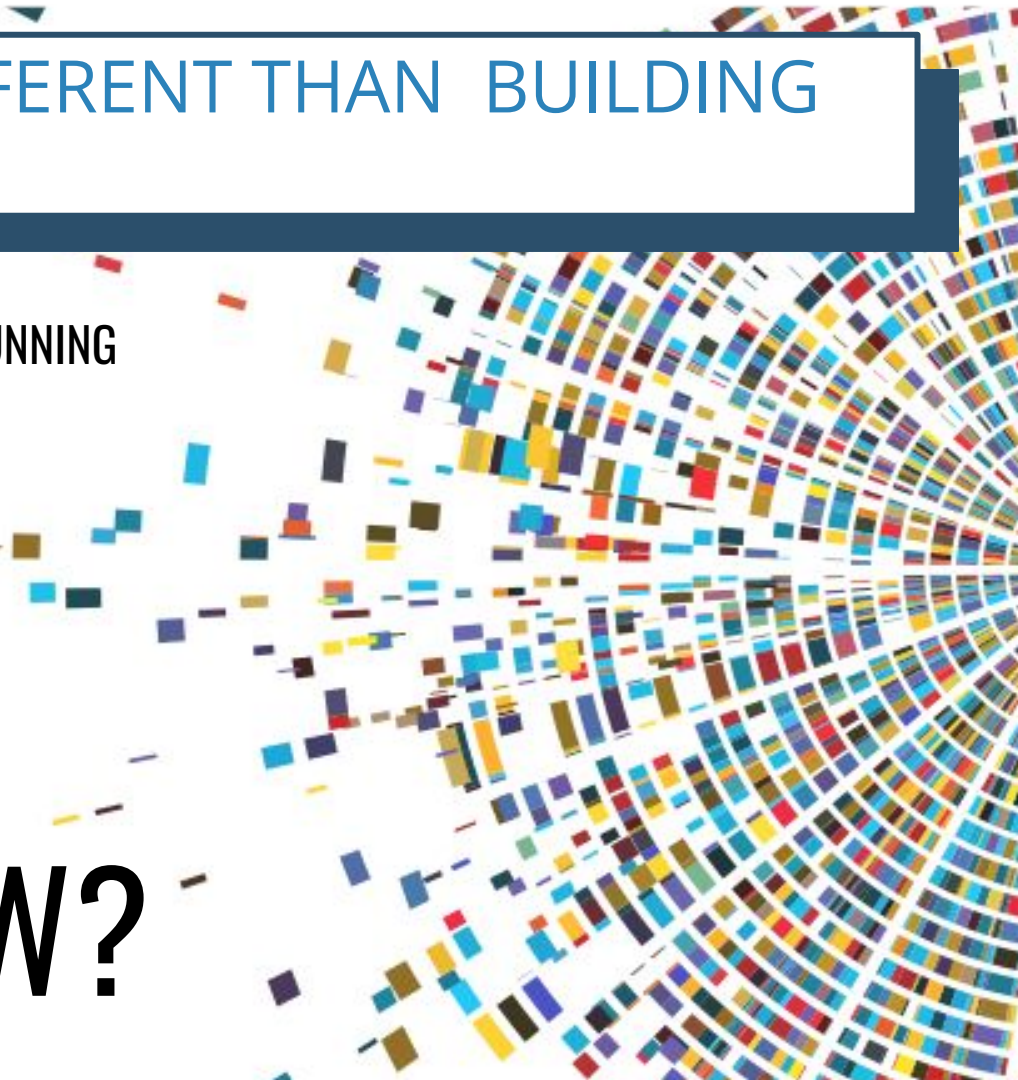
MOVING TO MULTI-GYM || BOLSTERING PROGRAMS



HOW IS EXPANSION DIFFERENT THAN BUILDING FROM SCRATCH?

- YOUR EXISTING GYM(S) ARE UP AND RUNNING
- YOU ARE NO LONGER IN TRIAGE MODE
- THE GYM HAS MORE MONEY COMING IN
- YOU HAVE THE ABILITY TO DELEGATE
- ...AND BREATH.

WHAT NOW?



BUILD UPON THE FOUNDATION

HIRING: MORE GYMS MEANS MORE PEOPLE

- STANDARDIZING HIRING PROTOCOLS
- DEVELOPING COMMITTEES

TRAINING: GET EVERYONE ON THE SAME PAGE

- STANDARDIZING SYSTEMS
- CREATING CONSISTENCY
- BUILDING TEMPLATES
- DOCUMENTATION

BUDGETS: PLANNING FOR THE FUTURE

- HOLDS AND VOLUMES
 - EXPANSION
 - ANNUAL
- EVENTS AND COMPETITIONS
- PROFESSIONAL DEVELOPMENT



CREATE MORE ROUTESETTING LEADERSHIP



ROUTESETTING HIERARCHY

- **BUILDING UPWARDS...**
- **DIRECTOR OF ROUTESETTING**
- **HEAD SETTER ROLES AT EACH FACILITY**
- **ASSISTANT HEAD SETTER ROLES AT EACH FACILITY**
- **CREATING HIGHER LEVEL OPERATIONAL ROLES AS WELL AS OTHER LEADERSHIP POSITIONS CREATES MORE ROOM FOR EMPLOYEE GROWTH AND PROVIDES THE BANDWIDTH TO TAKE ON MORE SPECIAL PROJECTS**

ELEVATING THE ROUTESETTING PROGRAM

EDUCATION

- ROUTESETTING CHALLENGES
- FULL-BLOWN CLINICS

SUSTAINABILITY

- WELLNESS PROGRAMS
- INJURY PREVENTION
- ADDRESS CUMULATIVE FATIGUE

PROFESSIONAL DEVELOPMENT

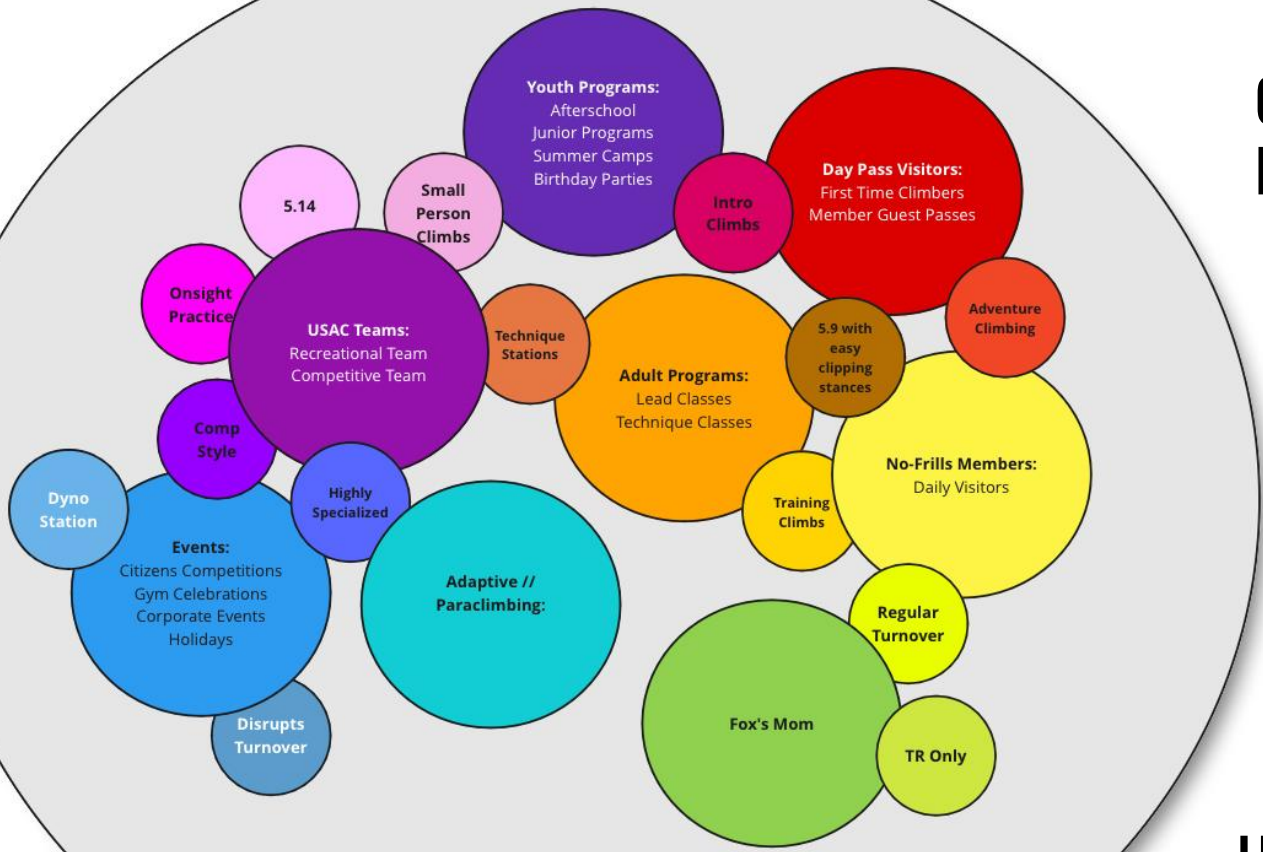
- PROVIDE GROWTH OPPORTUNITIES
- COMBAT ROUTESETTER BURNOUT WITH CREATIVITY INJECTIONS
- PROVIDE CONTINUING EDUCATION THAT ELEVATES THE VALUE OF THE ROUTESETTING TEAM



INTEGRATING DEPARTMENTAL NEEDS



THINK GLOBALLY



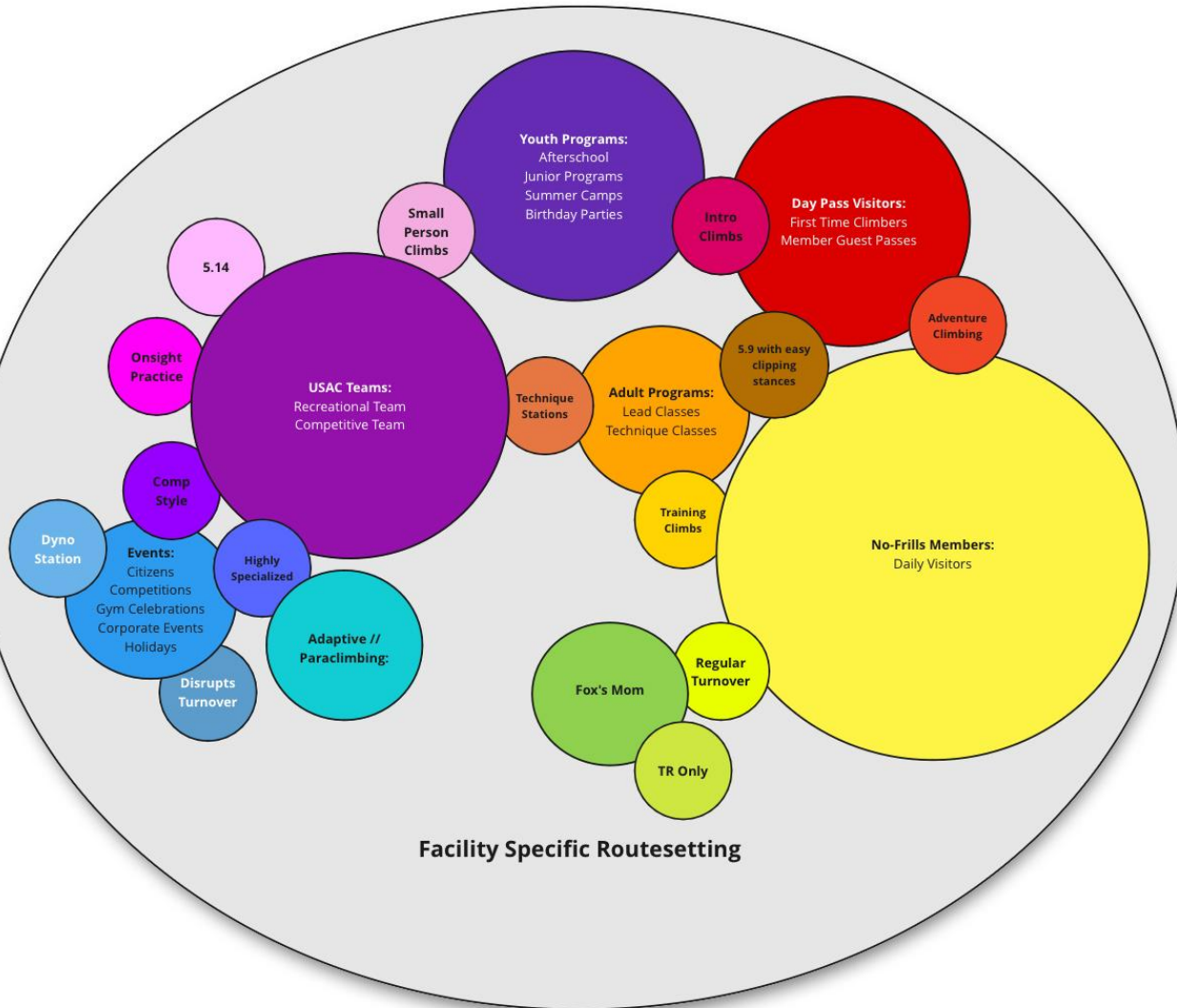
Facility Specific Routesetting

COORDINATING DEPARTMENTAL NEEDS

- **MANY GYM OFFERINGS PRESENT AN ASK OF THE ROUTESETTING DEPARTMENT**
- **THE ROUTESETTING NEEDS OF AN AFTERSCHOOL PROGRAM ARE DRASTICALLY DIFFERENT THAN THOSE OF THE COMPETITIVE TEAM OR A MEMBER BOULDERING LEAGUE.**

HOW DO WE PRIORITIZE?

HOW DO WE PRIORITIZE?



- **ARE THERE ROUTESSETTING ASKS THAT SATISFY MULTIPLE DEPARTMENTAL OR PROGRAMMATIC NEEDS?**
- **HOW MANY CUSTOMERS WILL BE IMPACTED BY EACH ASK?**
- **WHICH DEPARTMENTAL ASKS ARE IN DIRECT CONFLICT WITH EACH OTHER? HOW CAN YOU BALANCE THOSE CONFLICTING NEEDS?**
- **WHICH ASKS HAVE A DIRECT RELATION ON REVENUE STREAMS?**
- **WHICH ASKS ARE TEMPORARY, AND WHAT IS THEIR IMPACT ON TURNOVER AND WORKFLOW?**



WHAT DOES YOUR GYM LOOK LIKE?

Risk

Mitigation



UNIFYING INFRASTRUCTURE AND DOCUMENTATION

WORK AT HEIGHT POLICY

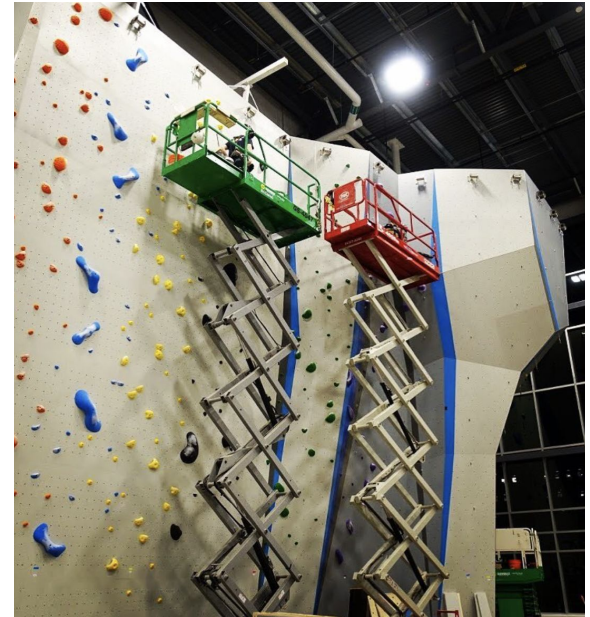
- CLEARLY OUTLINE PROCEDURE AND PROTOCOLS FOR WORKING AT HEIGHT
- DOCUMENTING EMPLOYEES ACKNOWLEDGEMENT

INSPECTION AND DOCUMENTATION

- PPE INSPECTIONS
- AUTOBELAY INSPECTIONS
- TOP ROPE, ANCHOR, AND QUICKDRAW INSPECTIONS

RESCUE PROTOCOLS

- ROUTESETTER RESCUE
- CUSTOMER RESCUE?



INFRASTRUCTURE TRIAGE

INFRASTRUCTURE TRIAGE: DEVELOPING POLICY, DOCUMENTATION, AND TRAINING

Planning Checklist for a Head Setter

As your gym begins to expand, you're going to need to develop organizational infrastructure, both as a means of standardizing practices as well as mitigating risk and protecting your company from liability. While this is far from a comprehensive list of everything you'll need to think about, we hope it can be a resource for you as you get started.

Sincerely,
-Vortex Routesetting

Policy Creation

Each organization approaches policy creation differently, and there are likely going to be different opinions on the best way it should be done. Depending on the command structure of your organization, there might be a lot of voices in the room when discussing policy changes, or policies might be communicated once they've already been decided. Understanding how your organization approaches policy development will directly impact how infrastructure is rolled out. Here are some questions to help get the conversation started:

- What policy and infrastructure development are you responsible for?
- What are the priorities? Are you starting from scratch or expanding upon existing material? Which other stakeholders do you need to consult on these topics?
- On what timeline does your organization plan to roll out each piece of infrastructure?

We recommend gaining a clear understanding of how your ownership team wants to prioritize developing and implementing infrastructure before dedicating hours of your life to authoring it. Having a perspective of your ownership team's priorities will inform which of these tasks you should tackle first.

Hiring and Training

- Roles and responsibilities
 - How is your routesetting department structured? Do you have tiers based on experience and skill?
 - Are there clear opportunities for growth and development? A transparent hierarchy of employment levels can help with retention and motivate growth and performance.

- Protect yourself... might not be... to check in with
- Work at Height
This applies to... defined Work... protect the gym... standards.
- Definition
 - PPE Re
 - Wall Ma
 - In
 - F
 - V
 - General
 - A
 - S
 - Routeset
 - E
 - Behind th
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 - A
 - At-Height
 - Aerial Lift
 - Acknowle
- Rescue Proto
- While we all hope... all staff are trained... scenarios that mig... protocols that bes
- Customer
 - Aut
 - Pic
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 - Routesetter
 - JAG
 - Pick
- Is your pay structure
 - Job Posting: Internal, external
 - Interview Protocols
 - How many rounds
 - Do you need a hiring
 - Standard interview hiring for.
 - Working interview
 - Apply your structure
 - Offer Letter template
 - Onboarding
 - Paperwork and
 - Orientation
 - *Swim, f
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A COMPREHENSIVE CHECKLIST FOR
HEAD ROUTESETTERS TASKED WITH
DEVELOPING POLICY, DOCUMENTATION,
AND TRAINING



INFRASTRUCTURE
TRIAGE CHECKLIST
CHECKLIST

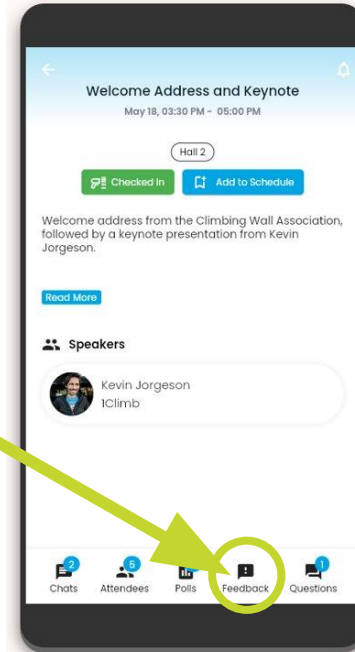
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QUESTIONS?



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Stay In Touch!



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