A user friendly, intuitive, and comprehensive software solution to enhance Economic Development activities around:

- Business recruitment
- Business retention & expansion
- Entrepreneurial development
- Event management
- Government front desk programs
- Investor relations management
- Project management
- Sector or cluster-based initiatives
- Sites and buildings
- Supply chain initiatives
- Workforce development
- Referral tracking

A Modular Solution

Our Economic Development Solution is part of a suite of modules built for municipal and county government.

Implementing multiple modules can lead to incredible efficiency gains as it enables collaboration and information sharing between agencies. We have modules for:

- Economic Development
- Environmental Health and Safety
- Community Development (Planning, Permitting, & Code Enforcement)
- Citizen Relationship & Request Management
- Workforce Development
- Public Safety Cadet Recruiting & On-Boarding
- Business Licensing

Economic Development Solution

Accelerate Economic Development

The prosperity of every community is tied to Economic Development. Every practitioner needs their tools to excel at their practice. The Economic Developer's best tool: The CRM!

Economic Development Organizations need a place to capture and share information about organizations in their region. Whether those organizations are targets or recipients of assistance, partner organizations, board members, office holders, or media, the need for shared contacts is critical to future business development efforts.

As new initiatives are launched, it is important to log outreach activities, and that the right messages have been shared with key organizations.

When a qualified company seeks assistance, being able to track and share the status of each business development opportunity is key. Reporting on opportunity projects by status, region, jobs, industry, type, and investment is a must.

Once a project is approved, it must be monitored, to be sure that the goals and project reporting requirements are being met.

Today's Economic Development Organizations know exactly that what they want - a CRM solution that:

- Meets their complex and changing needs
- Is easy for their staff to use
- Secure, anywhere access with no internal IT systems needed
- Works with the tools that they use every day (e.g. MS Outlook, MS Office 365, Smartphones, Tablets, etc.)
- Can be adapted to meet their unique needs
- Can integrate with their existing IT and financial systems
- Dashboards & reports that provide accurate information about outreach activities, pending and active projects, jobs and investments by industry and project type
- Can change as their business needs change
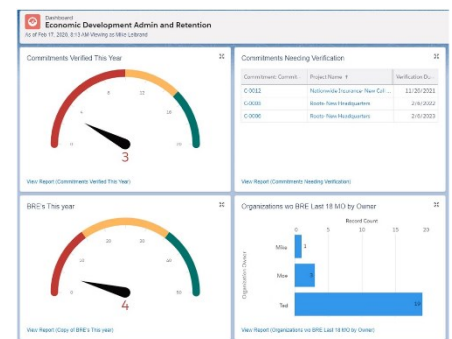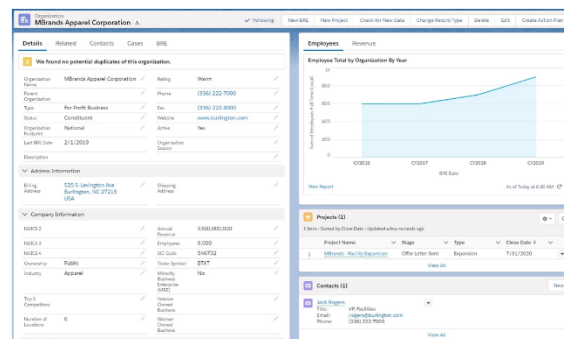
Summit

Meet our Economic Development Solution

Our CRM Solution for Economic Development is built on the Salesforce Platform and is our answer to the issues that Economic Development teams tackle every day. We built this solution to address the needs of Economic Development teams and agencies. It is easy to use, feature rich, and covers most organizations immediate needs with ample room for growth. Most importantly: It is a turn-key solution, ready to use today!

A solution as unique as your community

Unlike other CRM solutions, with our solution on the Salesforce Platform, you become part of a worldwide, multi-billion-dollar ecosystem that offers a diverse global resource pool and expands your organization reach beyond a proprietary solution. However, there's no organization like yours, so why not configure a CRM solution that's tailored to your precise needs? Here is a short list of what you can do with our Economic Development solution:

- **Projects:** Create a centralized master project record for each of your economic development initiatives.
- **Programs:** Search for available programs and track fund availability
- **Nurture:** Add Leads and Prospects to nurture lists to generate interest in your community
- **Enrich:** Add relevant information Prospects and Leads with a button click
- **Automate:** Reminders and follow-ups
- **Email** Templates: Send individual and bulk emails using personalized custom email templates
- **Incentives:** Maintain visibility of all economic incentives offered right on the master project record.
- **Grants:** Save all important grant information and connect to the master project record
- **Offers:** Easily generate offer letters with all incentives and commitments with no copy and paste
- **Compliance:** Easily track actual results for job creation and economic impact targets for active/won projects.
- **Sites:** Manage available site locations and perform site matching for Economic Development projects based on prospect needs.
- **Leases:** Manage leases/occupancies for business facilities such as incubators, offices, or properties.
- **Investors:** Track giving commitments and follow-through. Send automated notifications and reminders.
- **Case & Service Management:** Create business support/customer service cases, then assign and track through resolution.
- **BRE Surveys:** Powerful profiling and segmentation of your local business community. Complete BRE surveys and connect to actual business records – all from your mobile device!
- **Dashboards:** Measure the success of your department over the course of the year and year over year

Summit