# Empowering Economic Development with Salesforce

Strengthening the Pillars of Success

# Agenda

- CRM Definition
- Pillars of Economic Development
- Salesforce for Business Retention & Expansion
- Salesforce for Placemaking
- Salesforce for Talent Development
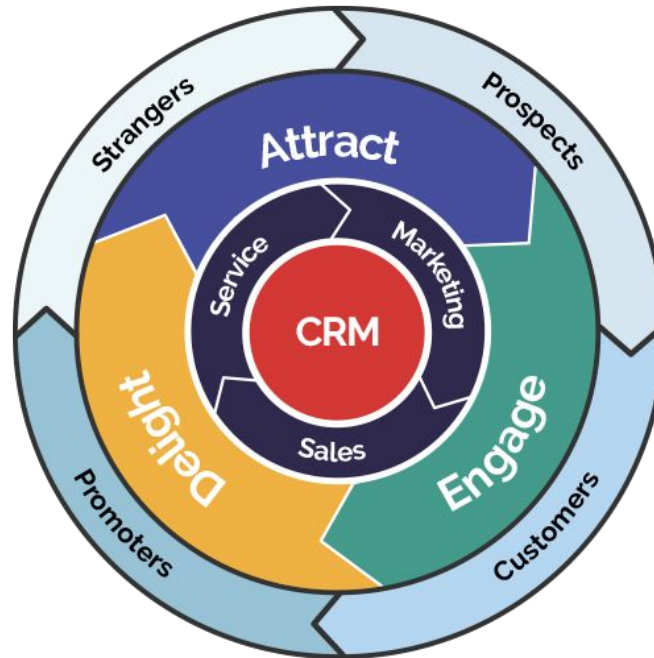- Salesforce Subscription Options

# Pillars of Economic Development

# CRM Definition

- Customer Relationship Management

# Salesforce Platform

# Salesforce for Business Development & Retention

- Retention
  - Cultivate relationships with business owners
  - CRM
    - Contacts - business owners
    - Accounts - businesses
    - Activities - phone calls, meetings, messages, notes
- Expansion
  - Attract new organizations
    - Contacts
    - Accounts
- Entrepreneurship / Start-up
  - Support with business counseling services and programs
  - CRM
    - Programs
    - Program participants

# Salesforce for Placemaking

- Marketing
  - Programs available
  - Talent available in your region
  - CRM:
    - Contacts
    - Accounts
    - Activities
    - Campaigns
- Community
  - Business support
  - CRM: Case management
- Events
  - CRM:
    - Campaigns - represent events
    - Campaign members - who attended your events

# Talent Development / Attraction

- Relationships with Workforce Development Partners
  - CRM
    - Contacts
    - Accounts
    - Activities
    - Campaigns
    - Campaign Members
    - Customize:
      - Track number of people who were trained in manufacturing automation versus number of people that were placed.

# Salesforce Subscription Options

- Nonprofit
- Salesforce Platform
- Salesforce for Public Sector

# Salesforce Power of Us Program

- Nonprofit program
- 10 Licenses for free
- 501c(3) or 501c(4)
- Salesforce Enterprise Edition
- Apply at https://www.salesforce.org/power-of-us/
- Budget for implementation with a Salesforce Certified Partner

# Salesforce Subscriptions

| Starter | Professional | Enterprise | Unlimited |
|---------|--------------|------------|-----------|
| The simple CRM suite with marketing, sales, and service for small teams | Complete CRM for any size team | Deeply customizable sales CRM for your business | The ultimate platform for growth |
| $25 | $80 | $165 | $330 |
| USD/user/month* (billed annually) | USD/user/month* (billed annually) | USD/user/month* (billed annually) | USD/user/month* (billed annually) |
| TRY FOR FREE | TRY FOR FREE | TRY FOR FREE | TRY FOR FREE |

# Salesforce Public Sector Platform

# Public Sector

- Omnistudio
- Case/Benefit Management
- Grant Management
- Emergency Program Management
- License and Permit Management

# What does your organization need?

- Focused on business expansion and retention?
  - Salesforce Sales Cloud for expansion - sales pipeline to track new relationship cycle with new organizations.
  - Salesforce Service Cloud for retention - case management to support business owners in the community.
- Focused on placemaking?
  - Salesforce platform integrated with events management system.
- Membership based organization?
  - Salesforce platform with customizations to track membership start/end dates, members from each organization.
  - Experience Cloud to provide a portal for your members to interact with each other and share resources with your members.

# What is your biggest takeaway?

- What are you going to do with what you learned here today?

# Our Credentials

# Thank you!

- Schedule a discovery call at [crmgrowthstrategy.com](http://crmgrowthstrategy.com).
- Connect with me on LinkedIn:
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