Regionalism & Effective Board Operations Through CRM Technology
Presenters

Moderators:
Dr. Christine Bosworth, Co-founder & CEO, Business U, Inc.
Celina Shands, Co-founder, Business U, Inc.

Panelists:
David L. Hollars, Executive Director, Centralina WDB
Marty Holliday, Executive Director, New River/Mount Rogers WDB
Jenny Bolte, New River/Mount Rogers WDB, Project Manager, America’s Promise Grant
On the Agenda

- Common Challenges with Regional Collaboration
- Using CRM to Overcome Challenges - Regional Models
- Regional CRM Blueprint: 4 Key Strategies for CRM Adoption
- Q & A
Common Regional Collaboration Challenges

- Lack of agreement on "common outcomes." What do we collectively want to achieve?
- Lack of strategy to drive what we need to accomplish individually.
- No organizational structure and agreement to manage the ongoing tasks. Who is doing what?
- Lack of communication processes – who is the designated backbone organization to ensure communication occurs between partners?
- Stakeholder apprehension – CRM technology and “sharing” / “seeing” our business contacts
CRM Strategies

Regional CRM Blueprint

- Engagement Measures
- Defined Roles
- Outreach Activities
- Automated Workflows
CASE STUDY

Regionalism & Effective Board Operations Through CRM Technology

Marty Holliday, Executive Director
New River/Mount Rogers WDB

Jenny Bolte, Project Manager, America’s Promise Grant
New River/Mount Rogers WDB
Creating an “early warning system” to manage business intel and increase business engagement in three Workforce Areas
Creating a “No Wrong Door” approach to Business Services
Awarded $6 Million DOL America’s Promise Grant (and coordinating efforts of four Business Services Specialist in four Workforce Areas)
$6,000,000
1,100 Participants
35 Jurisdictions
4 Workforce Development Boards
Numerous Partners, Contractors, and Vendors
We needed a database to manage participants.

**Challenge**

- PIRL data
- Case Notes
- Data for stakeholder reporting and Evaluation
- CSV to upload into WIPS
- Upload files

**Solution**

A Customized database incorporating all of the above.
We needed to be more efficient in the management of our participants.

- Training Information
- Leveraged Funds
- Financial Requests
- Partners

You had me at “no paperwork”

Created the “Collaborative Funding Authorization” (CFA) Module
We needed a way to better track our participant spending. Created the “Finance Record” Module which links back to the requests made in the CFA.
We needed a more efficient way to pre-screen our applicants to more quickly determine eligibility and suitability.

- Employment
- Training
- Financial needs
- Wage target vs. Occupational wage range
- Write an essay as to how they will benefit

**Solution**

Created the “Pre-Screening” Module.
We needed a more efficient way to provide participant Follow-up for employment retention and advancement.

- Employment and Wage Information
- Reconnected to Navigator for services
- Referrals to community agencies

Created the “Follow-up” Module that uses eMarketing.
We need valid and reliable data.

- Useful for all staff
- Generate accurate reports for multiple stakeholders

Ongoing staff training, reports that cross-check data from several angles, and validation errors built into the system.
If you’d like to delve deeper into the Pathways B2B Engage® CRM database, see me for a tour.

If you can envision it, Business U will try their hardest to build it for you.
CASE STUDY
Regionalism & Effective Board Operations Through CRM Technology

David L. Hollars, Executive Director
Centralina WDB
MAXIMIZING BUSINESS ENGAGEMENT

Connected to Your Community

The Centralina Workforce Development Board coordinates the services of hundreds of organizations in the region to create a strong network of employment and training solutions for businesses and career seekers. Use our interactive map to find the career center or partner locations nearest to you.
What inhibits collaboration?

People not "seeing" collaboration as a part or expectation of their role

Collaboration Challenges

- Roles & Responsibilities
- Trust & Relationship
- A Culture of Non-Sharing
- Lack of Leadership
- Lack of Cultural Will
- No Backbone Organization
- Territorialism
Automating Business Engagement

Process to Eliminate Siloed “Asks”

Communication Overload
Meeting Fatigue
Duplicate Efforts
Limited Services and Reach
Disengaged Businesses
Lack of Articulating Benefits to Partners and Employers

Barriers to Adopting CRM Technology

I’m not sharing MY business contacts
I don’t want to give up control of the relationship
What’s in it for me?
Not ‘all in one” functionality
Not vertical specific
What Can You Do to Be Successful?

• B2B Engage CRM needs a local champion (i.e., Centralina Workforce Development Board Business Services Leader)

• Ensure Workforce Board and local Career Centers are active and engaged users

• Get Economic Development on-board (ex. Rowan County EDC)

• Constantly promote the benefits of working together

• Lather, Rinse, Repeat
The Hidden Costs of CRM: 6 Questions to Ask a CRM Vendor

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<th>Question to Ask the CRM Vendor</th>
<th>Why Ask The Question</th>
<th>How B2B Engage® Answers The Question</th>
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RESOURCES

- Building Third Party Credibility with Business & Industry
  Capturing Testimonials & Quotes

- Vertical Specific Customer Relationship Management
  How to Evaluate CRM Tools to Meet Organization-Specific Needs

- Business Engagement Strategic Plan Template
- Free GED Preparation Course
  Web-based - 24/7 access

- Business Engagement Boot Camp®
  Professional Development Learning Event

- Vertical-specific CRM Technology
  Operational Support

- Certified Business Engagement Professional™
  Professional Development Course

www.business-u.net

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