

## Customer Relations Management Technology Invitation to Participate

## Regional Collaboration: Automating Business Engagement

To support regional workforce, education and economic development organizations in collaborating effectively to serve business and industry, High Country Workforce Development Board (WDB) has invested in Business U's dynamic CRM tool called B2B Engage<sup>TM</sup>.

B2B Engage<sup>™</sup> is designed specifically to help partners maintain full control and confidentiality of their business contacts while maximizing collaboration and referral processes among partners, automating workloads and reporting business engagement.

## Features of B2B Engage<sup>™</sup> include:

- Eliminate Excel Spreadsheets to Manage Business Contacts
- Avoid Duplication of Effort Among Partners & Staff
- Manage Relationships & Data Entry Using Mobile Technology
- Create a Confidential Section within the CRM for Business Contacts
- Make Seamless Referrals to Other Staff or Partners to Serve Business
- Use Workflow Processes to Automate any Type of Business Engagement Activity
- Flow Social Media Feeds into a Contact Record to Stay Informed of Business' Activities
- Connect Important Websites Using Data to Identify Industry Trends
- Upload Documents and Tools to Support the Business Engagement Team
- Schedule Meetings among Staff and Partners
- Use eMarketing within the System for Business Engagement Campaigns
- Use the Reporting Feature to Measure Business Engagement



Outreach & Campaigns

B2B Outreach Strategies Fully Integrated
Automated Lead Generation Forms for Website
Automated Alers and Look-ups for Website Traffic
Customized Newsletter Templates

Staff

bille Technology
for Business Contacts
rtners to Serve Business
be of Business Engagement Activity
and to Stay Informed of Business' Activities

Pentify Industry Trends

Sector Management

High Growth Sector Strategy Management Regional Service Networks for Business & Industry

Partner Engagement Tools Data & Research Integration

Partner Communication

Business

Engagement

**Automation** 

**Metrics** 

& Reporting

Service Metrics Automatically Generated Customer Survey Tools

Measure High Growth Sector Outcome:

Business Engagement Reports

Workflow

& Operations

Coordinated Workflow Processes Management of Business Contacts

Notification of Missed Deadlines

Instant Chat with Team Members Integrated Email

Integrated Needs Assessment

To participate in using this highly effective regional tool, please contact Adrian Tait at <a href="mailto:adrian.tait@highcountrywdb.com">adrian.tait@highcountrywdb.com</a> or 828.265.5434x130.

The High Country WDB has invested in the configuration, so cost to participate is only \$40/user/month.

We will be demonstrating B2B Engage at the Business U Boot Camp $^{TM}$  on 9/17/15. If you cannot join us call us for a demo today.