

Supplementary Budget – Briefing Note

2019 Budget

One page brief per request

Briefing Note required for:

- items >\$50,000
- changes in FTE
- Corporate Strategic Initiatives

Dept	Division	Business Unit	Item	Base Supp	Amount	FTE Impact
CD	Economic Development Services	11064	Purchase of Contact Management System for consistent file communication and information retention – currently no central file for contact and communication information	B	\$10,000	0.00

Background:**CRM (Customer Relations Management) Solution**

Economic Development Services needs a simple CRM tool to manage contacts, emails, demographics, pipeline view, and other key client information. To ensure that the system can be developed quickly and at a reasonable cost, it will be primarily a manual system that is assisted with cloud-based software support.

The system will not be connected with municipal data such as phone/email/cell, but can be cross-shared with the Economic Development team through the cloud solution so that information can be accessed in a reasonable timeline using phone apps and internet browsers such as Google Chrome.

One key solution that the system can help provide is to amalgamate the multiple tools Economic Development is currently using to capture client information such as Word, Excel, Outlook, Constant Contact, etc. By centralizing the information into a CRM, we can better manage clients and communicate with them on a regular basis.

For succession planning, currently there is no central file existing for client contact and communication information. Each staff member maintains his or her own client database, electronic and hardcopy files.

Comment: