It is MEDA’s privilege to submit this report for the current contract to the Governor’s Office of Economic Development, Montana Department of Commerce, Montana Department of Labor and Industry and Montana BEAR Team participants regarding Business Expansion and Retention (BEAR) Program activity in the state. The following is a summary of MEDA BEAR activities as provided for in the Scope of Work under Amended Contract MT-MEDA-ED-12-01 for the month of May 2015.

ACTIVITY REPORT FOR MAY 2015

MONTANA BEAR PROGRAM HIGHLIGHTS

Use It!
I recently was drawn to an article about good and bad CRM (Customer Relationship Management) programs. As you know, ExecutivePulse is the Statewide Montana BEAR Program’s CRM tool. I expected the article to list the best CRM’s and the pro’s and con’s of using each. Instead, the author highlighted the problem with all of the programs: the user! The user often does not implement the program in the right way, does not appreciate the power of the data, and does not enter the data so it can be properly used for future marketing of the program, business support, possible legislative data/support, and/or trends emerging. The author emphasized that all CRMs become terrible when users cut corners or try to do too much at one time and neglect the details.

My favorite part of the entire article: These applications are terrible when managers don’t insist on the reports they should be using, don’t enforce rules for entering new opportunities and don’t commit to long-term, consistent and repetitive drip-marketing and communication campaigns using the information maintained by their CRM system to keep their prospects informed and their customers close.

The bottom line is that our database is only as good as the information that is put into it. Changes are being made to the Montana Retention Survey so that it is more streamlined; yet analytical data is still going to be required. No doubt a balanced reporting process will be in place before July 1. Thanks to Mike Jackson, Warren Vaughan, and Chad Moore for their help!

IWT and MDLI Update from Chris Wilhelm
Chris Wilhelm graciously provided an update on the following:
- Funding Update: When HB-2 was passed it had several amendments that impacted ESA funding, which is the same funding for IWT. Fiscal staff is still working to finalize funding amounts for the various programs. Chris is hopeful that IWT funding will be close to previous amounts.
• WebGrants Updates: IWT continues to move forward with WebGrants. SFY16 applications will be processed in the new system, starting July 1st when IWT funding is awarded.
  o Watch for WebGrants orientation dates, which are being finalized. There will be two opportunities before July 1st to learn how to review applications in the system.
  o BEAR team administrators will be contacted by me within the first week of June. Teams will need to select a review setup that is right for their community: PANEL – Team members review applications and log comments individually, then a designated contact submits a consensus review which rolls up team members’ results; or INDIVIDUAL – A designated contact submits a consensus review.
  o All businesses that submitted applications in SFY15 will be contacted (approximately the 2nd week of June), and encouraged to create a login with WebGrants. This is a good opportunity to practice navigating the system, and enter core data for the organization. It also provides adequate time to help trouble-shoot before applications begin rolling in on July 1st.

Data Highlights for May
There were eight BEAR Retention Visits held in May: Stillwater County – 1, Park County – 2, Flathead County – 5.

Action Items Opened/Closed: Park County – 1, Flathead County – 2/2, Gallatin County – 15/12.

May Outreach Specialist Visits and Business Updates
The following BEAR Team members completed Business Retention Surveys or update reports for the businesses they have contacted.

Marissa Hauge – 1  Mike Jackson – 5  Warren Vaughan – 15 updates
Doug Bolender - 1  Katie Weaver - 2

![Business Challenges May 2014 – May 2015](image-url)