

ExecutivePulse

The ExecutivePulse™ Business Intelligence System

A Value Added Proposition

The *ExecutivePulse™ Business Intelligence System* is a CRM database/communications platform that has been specifically designed to facilitate the retention of existing businesses and jobs by encouraging economic, community and workforce development organizations to work together. Intuitive and easy to use, the platform is strategically designed with features and functions that:

- Foster communications and collaboration among individuals and organizations.
- Enable personalized responses to a company's request for assistance to be easily created and tracked.
- Provide an in-depth understanding of the business climate and challenges facing the business community.
- Create a unifying tool for program partners that enhance collaboration.

An Indispensable Tool

The ExecutivePulse system is designed to be an indispensable tool in every community. It enables economic, community and workforce development professionals to:

- Create detailed profiles of individual companies, including data and text fields.
- Monitor the status of a company and key company metrics – from existing companies to closer or relocated firms.
- Share some or all of a company profile with partners on an as needed basis.
- Generate referrals (action items) to one or more partner organizations.
- Track the progress of each referral as it is being addressed by a partner.
- Log entries to track all contact with a firm.
- Generate a wealth of pre-defined reports.
- Conduct customized searches of the database, regardless of company status.

Users of the database/communications platform are assigned based on task and/or geographic segmentation; they can be dynamically assigned by regional or local program managers without intervention from ExecutivePulse.

ExecutivePulse also provides a full suite of administrative, management and outreach tools. New features and function are routinely added based upon user requests and feedback.



Prospect Tracking Module

ExecutivePulse Inc. is pleased to offer a powerful, new Prospect Tracking Module that provides the ability to track a potential new business to a community from the initial inquiry to final won/lost resolution.

This fully integrated module establishes a portfolio for the prospect that can be systematically updated as more information is learned about the potential business. The portfolio includes baseline information, contact details and project specifics ranging from type of project and location requirements to low-to-high job estimates. The portfolio also mirrors key features and functions from the standard business retention system—providing a fully consistent user experience and interface.

Also, consistent with all ExecutivePulse systems, full reporting is standard with the *Prospect Tracking Module*, enabling reports to be generated for the number of projects in play, those that have been won and lost, and related job creation, among others.

Best of all, when a project is won, the company becomes part of the business retention database without losing any historical prospect information.

The Prospect Tracking Module is the perfect complement to the ExecutivePulse™ Business Intelligence System. It creates a comprehensive and holistic approach to customer management. It enables economic, community and workforce development professionals to enhance their combined efforts to assist businesses – both existing and potential new companies.

For more information, please contact us:

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