



Montana Department of Commerce unlocks detailed program visibility to all their relevant stakeholders

OVERVIEW

In conjunction with other divisions of the Montana Department of Commerce and partners around the state, the Montana Office of Tourism and Business Development (MOTBD) supports businesses through technical assistance, research, and access to grants and loans while inspiring visitation to maximize the economic impact of tourism, encourage private sector investment and ensure that Montana is a great place to live, work and play today and for future generations.

As the largest economic development organization in the state, MOTBD plays a critical role in strengthening the economy through job creation and business development. Although the agency makes a sizeable economic impact in the state, it was tasked by statute to provide more detailed reporting of their program results. With a large set of disparate programs spread across multiple departments and lacking a centralized system to collect, save, search and share information, MOTBD needed to implement a solution that was flexible enough to accommodate each program's unique needs while also rigorous enough to provide oversight into their data. With the new solution in place, MOTBD has improved collaboration, reduced data silos and can now create detailed reports on the outputs of the agency.

KEY OUTCOMES

- Increased Reporting Efficiency
- Increased Salesforce adoption
- Improved Program Insights

Challenge

Prior to launching its new solution, MOTBD was investing a lot of effort to generate reports that capture their most important program metrics and outcomes. Although recently passed legislation made this problem a critical priority, it was something that the agency had difficulty with as the number of programs increased over the years. With more than 20+ programs spread across departments and no CRM to track interactions with each company, it was a challenge to make company information accessible throughout the agency.

CHALLENGE



Furthermore, managing project goals, budgets, pledges, members and activities was exceptionally daunting without a tool specifically designed for economic development organizations. MOTBD needed to find a trustworthy partner to customize and implement a CRM platform that would let them collect, save, search and share information related to the people and companies they work with.

Solution

MOTBD partnered with MST Solutions to implement the Salesforce Lightning Platform for capturing program data in a manner that would let them easily produce reportable outputs. MST Solutions built an agency and industry specific data and security model and migrated all programs to Salesforce in a way that would allow projects to be associated with different industries, geographic regions and businesses. To capture record types, metrics, contract and payment details for each program, MST Solutions created a custom program management lighting app and provided regular training sessions that would ensure a successful rollout and increase user adoption.

Visit mstsolutions.com today to learn how other businesses have partnered with MST Solutions to get integrated with Salesforce.

Results

MST Solutions implemented a user friendly, intuitive, and comprehensive solution that allows users to replace their daily business processes and track all interactions with companies and contacts, such as calls, emails, meetings and follow-ups. The Salesforce platform captures all project, company, contact and activity information in one place and makes it easy to check the status of each business development opportunity. With a CRM solution tailored to its precise needs, MOTBD can aggregate and report on their data in ways that were previously very time-consuming. This allows better insights into the work they do and improves efficiency and program effectiveness.

Management and executive staff now have a tool for reporting on the outputs of the agency that has dramatically improved efficiency when generating reports for its regional partners, the state legislature, federal government and other stakeholders. Moving away from spreadsheets and into the new tool has increased collaboration between different programs internally and with external partners around the state. And, with a 360-degree view of all its accounts and contacts, MOTBD can provide a better experience for its constituents and has transformed into an organization with best-in-class contact and metric management.

BY THE NUMBERS

- 1286 contact records migrated
- 4878 account records migrated
- 514 project records migrated
- 25 program records migrated
- 42 reports developed
- X hours save on reporting tasks

