

CRP Lead Sharing Protocol (Attachment #1)

This document outlines the elements of a Lead-sharing protocol for the Calgary Regional Partnership to share Leads generated through CRP-sponsored activities with Economic Development Officers (EDOs) from member municipalities.

The document is arranged in three sections: definitions, process objectives, process flows.

Definitions:

Customer Relationship Management (CRM) System: a technology system that CRP manages to house its contacts, track interaction online, etc.

Contact: anyone interested in logistics - within CRP's Customer Relationship Management (CRM) System for the transportation and logistics sector, this means the person has downloaded the eBook at a minimum.

Lead: is a contact who has accessed a number of resources/articles generated through CRP's inbound marketing approach and websites, and is deemed to have a demonstrated interest in investing or operating in the region. They have a real estate or business need (e.g. they want to operate/expand in the region, or they want to do business with companies in the region). For the purpose of this discussion, it is assumed that this is less than 10% of the total contacts generated.

CRP's "Honest Broker" role: makes initial contact with a lead and triages needs to involve member EDOs in direct contact. (The "Honest Broker" role will be served by a CRP staff member or contractor).

Please note that from a Lead perspective, real estate brokers, shippers/buyers, and 3PL/Consultant companies are our targets.

Process Objectives

1. To provide an efficient, effective mechanism for capturing and following-up on Leads that have been generated from CRP-sponsored activities.
2. To create and use a contact tracking application to systematically process contacts and Leads for personal contact by CRP and member EDOs.
3. To have a collaborative, systematic and transparent approach for transferring Leads to member EDOs for direct follow up and reporting on progress. Direct hand-off of Leads to member EDOs, in an orderly fashion and after initial contact with CRP's staff, is the preferred method of follow-up.
4. Establish ongoing and documented communication protocol between CRP and the EDOs with respect to lead sharing and follow-up progress.

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Process Flow Possibilities

Local Business Contacts/Leads (businesses already operating in the region)

- If a Lead is located in the Calgary Region already, and approaches CRP with an interest in expanding, setting up an additional operation and/or having a particular issue addressed (e.g. getting better transit service closer to their site), CRP will contact the local EDO and provide assistance to the local EDO in addressing the business's needs, where invited and as appropriate.
- CRP staff will encourage Leads to visit the VHI and CLC websites to consider potential membership and/or the possibility of attending a VHI conference or CLC monthly meeting.

Leads From Outside the Region

- Initial contacts (e.g. from CargoLogistics Trade Show) will be placed into CRP's contact management software and tracked until they become Leads.
- Leads not located in the region (i.e. investment attraction opportunity) - CRP makes initial contact to understand business interests and to determine which EDO(s) should be involved in direct follow-up. Assessment will include specific or special needs such as rail-direct-to-site, requiring transit service, etc. Intention is that Leads will normally be directed to one or more EDOs for follow-up.
- CRP will always assist in promoting the region with any EDO, upon request and to the extent that resources are available.
- Partners like the VHI or CLC may be consulted by CRP, EDOs and/or Provincial resource staff, and potentially invited to participate in site visits, etc. with prior permission of Lead.
- The above process will not be engaged if the Lead requests confidentiality with CRP staff. This includes local real estate brokers. In these situations, CRP staff will follow-up and assist the Lead directly.
- Leads outside the region will be informed of the VHI (particularly Leads in western Canada) and CLC and encouraged to become members and/or participate in VHI and CLC events and meetings.
- If requested by an EDO or a Lead, a standard non-disclosure agreement may be entered into with CRP's staff and/or contractors.