

Synchronist Suite

## Your Community's Business Portfolio

### Realizing Community Potential

Joe Raso  
Blane, Canada Ltd.

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## Our Agenda...

- **Welcome & Introduction**
- **Best of Iowa Existing Business Program Overview and Plan**
- **The System & Interview Process**
- **Data Input & Reports**
- **Lunch Break**
- **Output for Your Stakeholders**



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## Creativity Exercise

1. How many jobs outside of economic development have you had in your career?
2. List a passion in your life outside your work?
3. Imagine the “Perfect State” for your work and organization.

Now list as many outcomes as you can to describe the environment, work being done, etc. in that “Perfect State”

## How We Learn Best

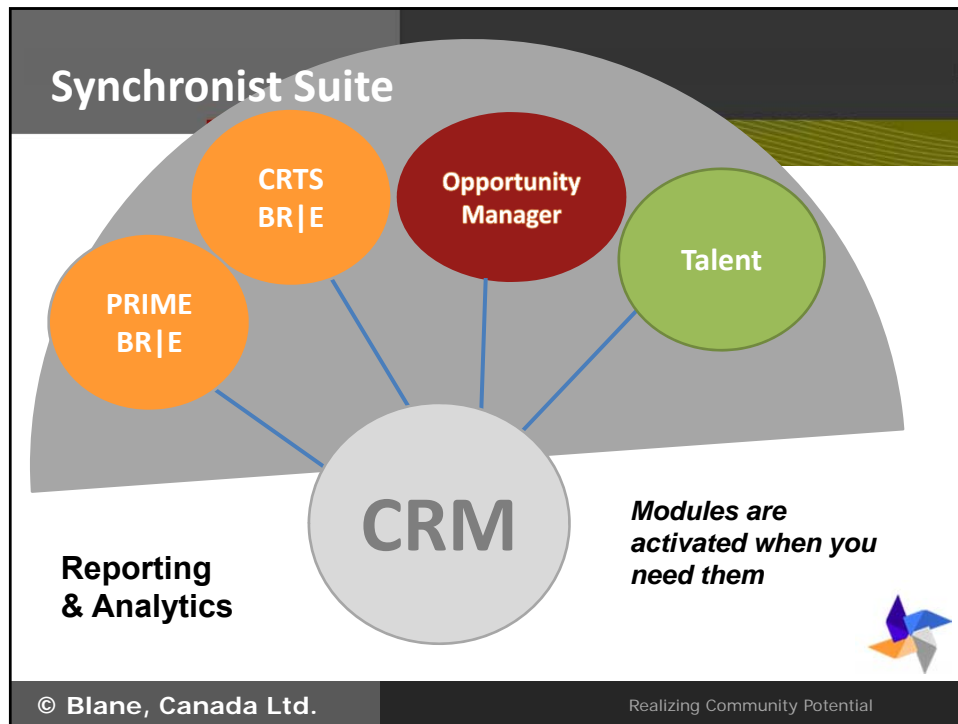
**Reaction** – To the presenter  
**Learning** – New knowledge gained (3-5 core things)  
**Behavior** – Change way you do business  
**Results** – Achieving set outcomes

# Synchronist Overview

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# Your Business Portfolio

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## Training Opportunities...

**Monthly**

- Basic Operator – CRM
- Basic Operator – PRIME Survey, Strategy, Tools
- Basic Operator – Reports

**Every Other Month**

- xTool – Predictive & Objective Analytics
- CRTS Module – (Major update in 2017)
- Interview Tips & Techniques
- Opportunity Manager – Project Management
- Mobile Apps – Apple & Android
- Talent – Deep Dive on Workforce

[www.blanecanada.com/training](http://www.blanecanada.com/training)  
UN: Training1 PW: train#89go

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The slide features a header with a dark grey background and white text. Below the header is a decorative bar with segments of red, orange, and green. The main content is a list of training opportunities, categorized into 'Monthly' and 'Every Other Month'. At the bottom, there is a URL and login information. A small logo with blue, orange, and grey geometric shapes is located in the bottom right corner of the slide.

**BLANE CANADA LTD.**

If you would like more information please call 630.462.9222

Please make a selection of what you would like to view

Videos Resources

- Training Materials
  - CRM / Prime / OpMgr and Reports
  - Quick Tips #1 Interviewer
  - Quick Tips #2 Interviewer
  - Value / Growth / Risk / Satisfaction
- How To Series
  - Assistance Tracking
  - Scatter Plot
  - XTool
  - XTool Partners
- Sample Reports/Brochures
  - Chattanooga
  - Colorado Springs
  - Iowa City
  - Nebraska
  - Woodford
- Administrative Tools

0:00

Please make a select

# Work Where You Work



Apple Store  
Google Play

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## Powerful Insight - Prioritization

- Value
- Growth
- Risk
- Satisfaction

**System Provides Key Info for Using Your Time**

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## Compared to What?

### Key Performance Indicators

- How do you know a number is a good number, until there is a point of comparison.
- Only Synchronist System has national benchmarks for every key data point.
- Synchronist Users know if they are ahead of the pack, on-track, or falling behind.

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# Understanding the Interview

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Nothing Changes Until...

~~SOMEONE~~ Talk To Executives

**YOU**

Substantive  
Conversations

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**Why Do We Do This...**

**To tell our companies what is happening in the market?**

**NO!!**

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**Why Do We Do This...**

**To learn what they think about the market?**

**Yes,  
Somewhat**

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**Why Do We Do This...**

To gather business intelligence for decision making?

**Absolutely!!**

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**Business Intelligence – Secret Agent?**

**I prefer a Professional Business Advisor**

**The components:**

- 1. Products**
- 2. Market**
- 3. Industry**
- 4. Management**
- 5. Technology**
- 6. Workforce**
- 7. Community Services**

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# Interviewer Quick Tips


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## Components of the Interview

1. Background Research
1. Setting Appointment
1. Preparing for Interview
1. Conducting the Interview
2. Post Interview Follow Up

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# The Survey & Data Input

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## The Survey Forms

**1**

**PRIME COMPANY BACKGROUND FORM**

*Information to be completed by applicant*

**Parent Company Information (if applicable)**

Name: \_\_\_\_\_ (City/State/Zip)

Address: \_\_\_\_\_

Phone: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ E-Mail: \_\_\_\_\_

Web Site: \_\_\_\_\_

Parent/Child:  Yes  No

**Parent Company Contacts**

Parent Company Primary  Parent Company Secondary

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Phone: ( ) \_\_\_\_\_ Extension: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_

E-Mail: \_\_\_\_\_

**Company Information**

Parent/Child:  Yes  No

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Web Site: \_\_\_\_\_

Year Founded: \_\_\_\_\_

Number of Employees: \_\_\_\_\_

Company Type: \_\_\_\_\_

**2**

**PRIME ON-SITE VISIT FORM**

*Information to be completed by applicant*

**Company Information**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Phone: ( ) \_\_\_\_\_ Fax: ( ) \_\_\_\_\_ E-Mail: \_\_\_\_\_

**On-Site Visit Information**

1. Was the company's primary business activity in the last 12 months?  Yes  No

2. Are you a manufacturer of goods or services?  Yes  No

3. Are you a provider of services?  Yes  No

4. How long has the company been in business?  1-5 years  6-10 years  11-20 years  21-30 years  31-40 years  41-50 years  51-60 years  61-70 years  71-80 years  81-90 years  91-100 years

5. How long has the company been in business in the last 12 months?  1-5 years  6-10 years  11-20 years  21-30 years  31-40 years  41-50 years  51-60 years  61-70 years  71-80 years  81-90 years  91-100 years

6. How long has the company been in business in the last 6 months?  1-5 years  6-10 years  11-20 years  21-30 years  31-40 years  41-50 years  51-60 years  61-70 years  71-80 years  81-90 years  91-100 years

7. How long has the company been in business in the last 3 months?  1-5 years  6-10 years  11-20 years  21-30 years  31-40 years  41-50 years  51-60 years  61-70 years  71-80 years  81-90 years  91-100 years

8. How long has the company been in business in the last 1 month?  1-5 years  6-10 years  11-20 years  21-30 years  31-40 years  41-50 years  51-60 years  61-70 years  71-80 years  81-90 years  91-100 years

9. How long has the company been in business in the last 1 week?  1-5 years  6-10 years  11-20 years  21-30 years  31-40 years  41-50 years  51-60 years  61-70 years  71-80 years  81-90 years  91-100 years

10. How long has the company been in business in the last 1 day?  1-5 years  6-10 years  11-20 years  21-30 years  31-40 years  41-50 years  51-60 years  61-70 years  71-80 years  81-90 years  91-100 years

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## Subjective Thoughts & Actions

3

A document titled "PRIME Post-VISIT/ASSISTANCE FORM" is shown, tilted at an angle. The form contains several sections with headings: "Section 1: Mark 1", "Section 2: Mark 2", and "Section 3: Mark 3". Each section includes a "Comments" field and a "Rating" field with a scale from 1 to 5. The form is partially obscured by a large number "3" on the left.

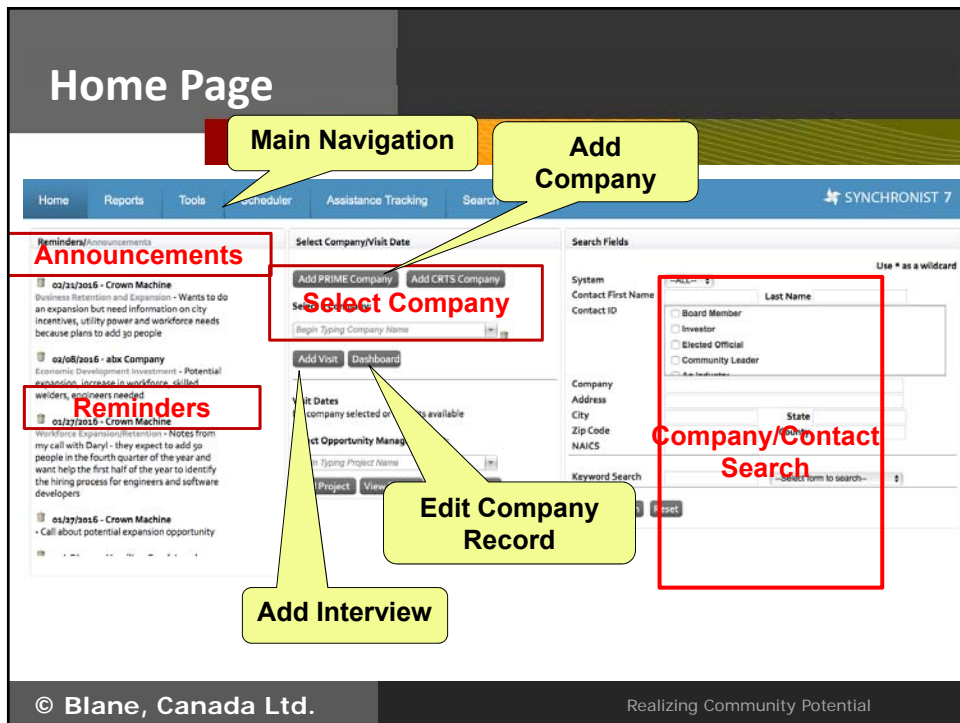
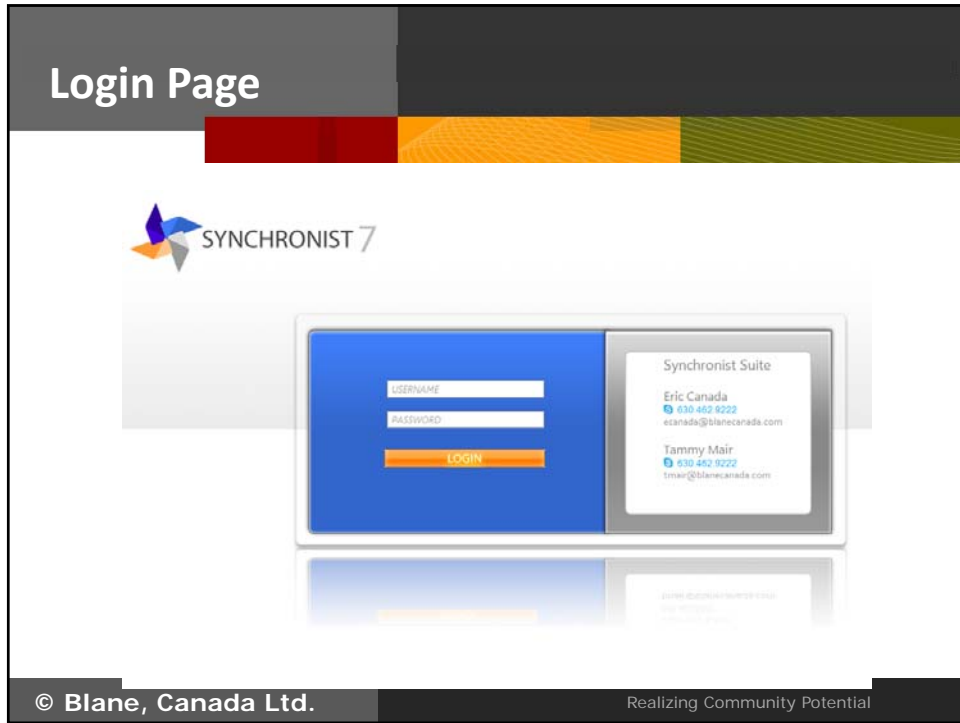
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## Entering an Interview

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Home Reports Tools Scheduler Assistance Tracking Search Logout SYNCHRONIST 7

Reminders/Announcements

Select Company/Visit Date

Add PRIME Company Add CRTS Company

Select Company

Begin Typing Company Name

Add Visit Dashboard

Visits

No company selected or no visits available

Opportunity Manager Project:

Project View Project OpMgr Reports

Search Fields

Use \* as a wildcard

System: --ALL--

Contact First Name: Last Name: Contact ID:

Board Member  
 Investor  
 Elected Official  
 Community Leader  
 ...

Company Address: City: State: Zip Code: County: NAICS:

Keyword Search: --Select form to search--

Search Reset

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# Reports

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**Predictive & Objective Reporting...**

- 1. The Company Reports**
- 2. PRIME Analysis Reports**
- 3. PRIME FreeStyle Reports**
- 4. AT Reports**



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**Lunch Break**


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## How To Tell The Story

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## Outcomes – Rule of 5

- Audience(s)
- Understanding
- Key Messages
- What Needs to Be Done
- Their Role

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# Tools

- **Infographics**
  - Reports
  - Events
  - Web Site
  - Social Media
  - Follow Up Marketing – small bites

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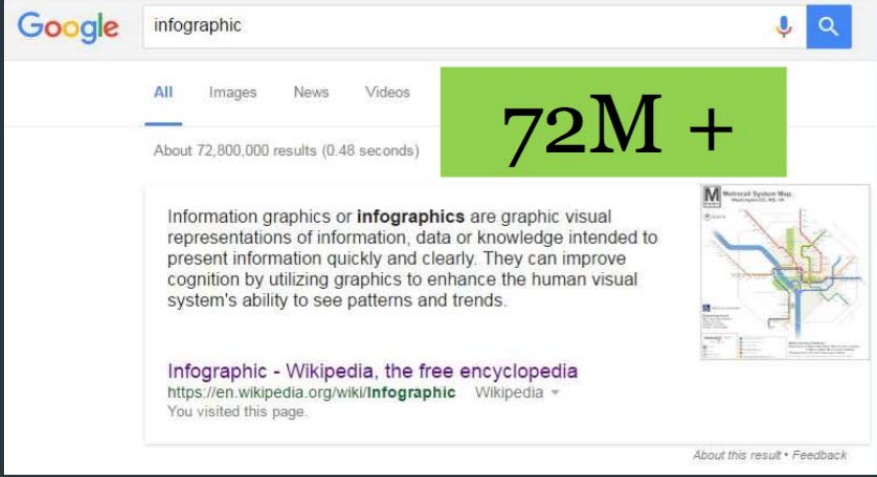
## From How to Wow! Telling your story using Infographics

**JERRY HERNANDEZ**  
ECONOMIC DEVELOPMENT ANALYST  
ECONOMIC DEVELOPMENT DEPARTMENT  
COUNTY OF MONTEREY - CA



*Google Image Screen Shot*

# What is an infographic?



Google infographic

All Images News Videos

About 72,800,000 results (0.48 seconds)

**72M +**

Information graphics or **infographics** are graphic visual representations of information, data or knowledge intended to present information quickly and clearly. They can improve cognition by utilizing graphics to enhance the human visual system's ability to see patterns and trends.

**Infographic - Wikipedia, the free encyclopedia**  
<https://en.wikipedia.org/wiki/Infographic> Wikipedia ▾  
You visited this page.

About this result • Feedback

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## Greatest Achievement

Turn findings into "quote graphics".

Quote graphics are reminiscent of motivation posters; easily digestible and help make the point memorable.



- 30 SALINAS VALLEY SURVEY Q1 Highlights GREATEST ACHIEVEMENT
- 21 BUSINESS CHALLENGE SUCCESSFUL CONCLUSION BUSINESS GROWTH OR SALES INCREASE
- 11 FACILITY RENOVATION, MODERNIZATION, RELOCATION
- 10 MARKETS EXPANDED OR ADJUSTED

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# KWYRWTS

**KWYRWTS**  
(Know What You Really Want To Say)  
(pronounced "k-whir-wits")

- Gather your information
- Know your message - what do you want your reader to take home? (who, what, where, how or when)
- Understand what you're trying to accomplish with your visualization
- TASS – Tell a simple story

From How to WoW! Telling your story using Infographics Bill Shander blog.visme.co

## Business Retention | Expansion (BR|E)

Data

- Simplify data visualization

Winery

- Synchronist interview findings/other sources
- (GP Corridor Plan/Ag Commissioner / Permits)

Infographic

- Winery Corridor Location/Approved Development/ Challenges / Future Economic Impacts

**WINERY CORRIDOR ECONOMIC OPPORTUNITY**

The Salinas Valley - Monterey County California

**WINERY CORRIDOR SEGMENTS**

RIVER ROAD METZ ROAD JOLON ROAD

THE WINE GRAPE GROWING REGION IS LOCATED AT THE HEART OF THE SALINAS VALLEY

DEVELOPMENT GUIDELINES FOR WINERY CORRIDOR

\$247M / Direct  
\$653M / Indirect

95% of grapes are grown in corridor

Estimated 75-85% bottled out of county

CONSIDER A SCENARIO THAT WOULD MORE FULLY UTILIZE EXISTING GRAPE PRODUCTION IN THE COUNTY.

BASED ON 40 NEW ARTISAN AND 4 FULL-SCALE WINERIES, WINE PRODUCTION CREATES 320 MILLION NEW BOTTLES OF WINE PER YEAR. ESTIMATED VALUE OF \$1.6B (R) OR \$2.6B (I)

Projected Value  
**\$1.6B / Direct**  
**\$2.6B / Indirect**

ESTIMATED JOB CREATION INCLUDES 2,300 WINERY JOBS, AND 9,500 OTHER RELATED JOBS TOTALING 11,800 JOBS

3 RESTAURANTS (No more than 1 per segment)  
5 DELICATESSENS (at Winery)  
8 BARS (1) (2) (3) (4) (5) (6) (7) (8) (9) (10) (11) (12) (13) (14) (15) (16) (17) (18) (19) (20) (21) (22) (23) (24) (25) (26) (27) (28) (29) (30) (31) (32) (33) (34) (35) (36) (37) (38) (39) (40)

1 BUSINESS CLUSTER (Winery related)  
2 VISITOR CENTERS (New 1001Aroyo Sacks & Hwy 68)

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## Economic Opportunity Pillars

**Economic Priorities**

- Represent 4 ED Opportunity Pillars (Ag–Tourism–Higher Ed–Research)

**Sector**

- Stakeholder findings (Committees/Experts/Others)

**Infographic**

- Highlight Pillars / Show Economic Impact

**ECONOMIC IMPACTS OF OPPORTUNITY PILLARS**

- \$8.1B Agriculture
- \$2.7B Tourism
- \$1.7B Education
- \$337.6M Marine Research

GRAPHICS ABOVE ARE HYPERLINKED

**ECONOMIC CONTRIBUTIONS OF AGRICULTURE**

INDIRECT: 29.6%  
DIRECT: 70.3%  
TOTAL INDIRECT & DIRECT CONTRIBUTIONS: 100%

**ECONOMIC CONTRIBUTIONS OF AGRICULTURE**

DIRECT AC JOBS: 55,702  
INDIRECT AC JOBS: 20,352

MONTEREY COUNTY ECONOMIC DEVELOPMENT DEPARTMENT  
80.786.5390 WWW.CO.MONTEREY.CA.US/ECONOMICDEVELOPMENT/

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## On-the-Job Training Program (Business Services)

**Challenge**

- Inform and motivate employers

**Message Delivery**

- Key Information: Program description, benefits, requirement, application, testimonial, contract

**Infographic**

- Employer OJT Benefits & Requirements

**BENEFITS OF ON-THE-JOB TRAINING**

The OJT program matches businesses with qualified job seekers who are eager to work, but need the specialized training only an employer can provide. In OJT programs, the business agrees to hire workers and train them in measurable skills. In exchange, the Workforce Development Board (WDB) in Monterey County agrees to reimburse the business for a portion of their wages.

The WDB reimburses the business up to 50 percent of the trainer's starting wage, for a set period that the business needs to master the required occupational skills.

**6 REASONS TO CONSIDER ON-THE-JOB TRAINING (OJT)**

CLICK HYPERLINKED ICONS BELOW

- No Cost Staffing Solution
- Employer Agreement
- Basic Employer Requirements
- Verify Work Skills
- Save time & resources
- Testimonials

Click here for WDB contact information (OJT - 831.786.4494)

MONTEREY COUNTY ECONOMIC DEVELOPMENT DEPARTMENT  
WWW.CO.MONTEREY.CA.US/ECONOMICDEVELOPMENT/

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# 20 DIY Tools

1. [Easel.ly](#)
2. [Visualize.me](#)
3. [Visme.co](#)
4. [PiktoChart](#)
5. [Canva.com](#)
6. [Infogr.am](#)
7. [Venngage](#)
8. [Dipity](#)
9. [iCharts](#)
10. [Geo Commons](#)
11. [Google Charts](#)
12. [Tableau Public](#)
13. [Photo Infographic Gen Lite](#)
14. [Get About](#)
15. [Creately](#)
16. [PhotoStats](#)
17. [Charts Bin](#)
18. [Gliffy](#)
19. [Tagxedo.com](#)
20. [Smile Widgets](#)



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# Evolution to web site

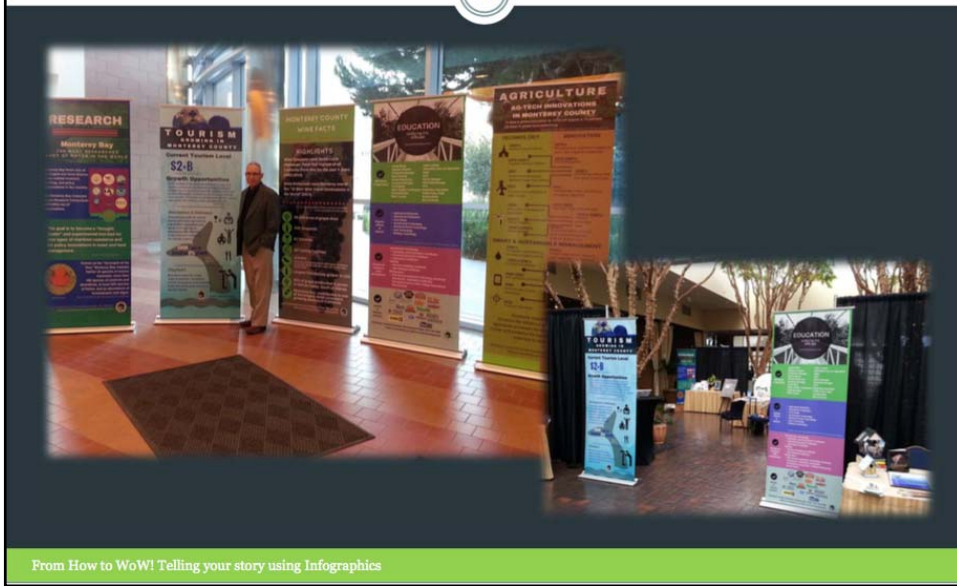


EDD website was updated to meet the following goals:

- Deliver information and data in a visually pleasing manner
- Create an easy-to-navigate format
- Increase the value and use of the website by stakeholders groups such as:
  - Economic Opportunity Committee
  - Development Set-Aside Partners
  - County Departments
  - Public At Large

**-- LET'S VIEW THE WEBSITE --**

# Retractable banners



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# Direct Mailing (Industry Association)



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# Hyperlinking

**BENEFITS OF ON-THE-JOB TRAINING**

**6 REASONS TO CONSIDER ON-THE-JOB TRAINING (OJT)**

- 1. No Cost, Staffing Solution
- 2. Employer Agreement
- 3. Basic Employer Requirements
- 4. Very Work Skills
- 5. Save time & resources
- 6. Testimonies

How to WoW!

# Brand Consistency

Create a uniform layout

**ECONOMIC PILLARS**

**Economic Opportunity Pillars**

**MONTEREY COUNTY ECONOMIC OPPORTUNITY PILLARS**

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# From How to Wow! Telling your story using Infographics



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**COUNTY OF MONTEREY - CA**



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Web Site: [http://www.co.monterey.ca.us/government/departments-a-h/economic-development/widget\\_1917\\_671a\\_4800](http://www.co.monterey.ca.us/government/departments-a-h/economic-development/widget_1917_671a_4800)

## Outcomes of This Training

- Reaction – 1-7 Scale**
- Learning – 3-5 take aways**
- Behavior – 6 weeks from now**
- Results – What are your metrics**





**Synchronist 8.0 in 2017**

**Share with me 2 critical needs**

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