



**Workforce Florida Inc.  
Expanding Business Engagement Initiative**

**Q1. What is the "Expanding Business Engagement" Initiative?**

Led by Workforce Florida and its regional workforce partners, the Expanding Business Engagement Initiative is designed to encourage Florida employers to more fully utilize the state's many employee recruitment, retention and training services.

Specifically, the initiative will set in place a statewide business development process; explore employers' barriers to entry; enhance employer satisfaction; and develop a consistent method to measure the effectiveness of employer outreach programs. The initiative was initially funded by the U.S. Department of Labor; Florida is one of 13 states currently taking part in the program.

**Q2. Why was the initiative started?**

Employers are a critical component of success for any workforce system. They fuel the supply of jobs and create an opportunity pipeline for those seeking employment or career advancement. But in Florida, only a small percentage of employers are actively engaged in the system; the state's Department of Economic Opportunity reports the system is currently serving approximately 4.32% of businesses\* -- a number that has remained relatively unchanged over the last three years.

**Q3. What services are currently available to Florida employers?**

Florida's workforce system includes a state-level policy organization and 24 regional teams that provide employers a portfolio of services to grow and train their workforce: customized and skills-upgrade training, on-the-job training, labor market assessments, job descriptions, job order fulfillment, resume screenings, on-site interview assistance and recruitment events.

**Q4. Who provides these services?**

Each region has a team of business-focused managers, typically called "Business Liaisons," who work closely with area employers to meet their hiring and training needs. These managers have operational and human resource experience and often serve as a company's primary recruiter.

\*Employer Penetration Report (EPR) Q4 2012

**Q5. How much do the services cost employers?**

There is no charge to employers to utilize the services, as they are funded through employment taxes paid by all Florida businesses.

**Q6. How many employers are using these services now?**

According to the most recent available data (Q4 2012), only about 4% of eligible Florida employers are taking advantage of the state's workforce services. That percentage varies from quarter to quarter and by region.

**Q7. What types of employers are being targeted through this initiative?**

While the workforce system provides services to all Florida employers regardless of size or location, this initiative will be focused on further engaging mid-sized companies in growth industries that have the potential to provide Floridians high-quality career opportunities, including those businesses in the state's target industry clusters and infrastructure industries.

**Q8. What's the initiative's business engagement goal?**

Statewide performance measures (Key Performance Indicators) are being studied as part of the initiative. As an initial goal, Florida Governor Rick Scott has challenged each regional team to double its year-over-year engagement level by July 1, 2014.

**Q9. Who is involved in the project?**

Workforce Florida is leading the initiative in partnership with its 24 regional partners. A Steering Committee comprised of Business Liaisons from each region as well as state leaders is guiding the work, and a smaller Core Team is more involved in the day-to-day project activity.

**Q10. What steps are involved in the initiative?**

There are three primary steps in the project:

1. **Discovery** -- an intense review of existing research and documentation, including regional strategic plans; customer satisfaction and usage reports; state and federal training grant reports; and informal feedback from Business Liaisons.
2. **New Research and Assessment** -- includes deep-dive sessions with regional business teams; 100+ interviews with non-user employers; benchmarking against other pro-business organizations; and assessment of current tracking systems.
3. **Strategic Planning & Tool Kit Development** -- synthesis and development of consistent business outreach model(s); development of cross-regional Key Performance Indicators (KPIs); development of statewide Customer Relationship Management system; and creation of tracking and measurement tools.

**Q11. Where is the project today and when will it be completed?**

The project is currently in the third step, Strategic Planning & Tool Kit Development, and is expected to be completed in the first quarter of 2014. Following the completion of Phase I, a second phase is being considered to implement a customer-centric, system-wide plan and comprehensive training program to create a sustainable culture of continuous improvement and market-responsiveness.

**Q12. What is a CRM and how will it assist WFI and the RWBs in better serving businesses statewide?**

Customer Relationship Management -- "CRM" -- is software designed to allow an organization to manage all aspects of its interactions with stakeholders, often including business intelligence to identify trends and new opportunities.

A common CRM system will enable Florida's 24 regional workforce boards and Workforce Florida to work together and enhance collaborative opportunities from a business services perspective. It will consistently record and track our ongoing work with employers, from first interaction through successful placements. It will also provide data and information so that business development teams can track performance against goals and identify areas that may need additional resources.

**Q13. Workforce Florida purchased Salesforce as its CRM system; will all the regions use Salesforce too?**

A few regions already have CRM systems and can keep using them; part of this project is to create a roadmap to ultimately connect those systems into the statewide CRM platform. For those regions that do not currently have a CRM system -- or a system they wish to continue using -- the goal is to make Salesforce affordable and available to them. If a RWB does not yet have a CRM and is pondering a CRM purchase, we encourage the RWB to pause and consider the work of the EBE Steering Committee, Core Teams and Pilot Working Group as they craft a potential system-wide application.

**Q14. What is the Pilot Working Group?**

The Pilot Working Group is a team of regional workforce business representatives who have agreed to invest their time in testing and enhancing the initial Salesforce CRM system prior to its broader introduction statewide. Their services have been essential in determining what elements in the CRM system work best for Florida's workforce system.

**Q15. Which regions are participating in the Pilot Working Group?**

Pilot Working Group team members are listed below, joined by Andra Cornelius, the Global Talent Innovation unit at WFI and WFI's IT Administrator, Nathan Roberts. Others workforce system partners including DEO have participated in periodic updates and Salesforce demo calls/meetings. All contributed great insights and input for the initial Salesforce CRM customization.

RWB 5: Andrea Parker

RWB 12: Shirley Walker and Anika Holmes

RWB 18: Joshua Matlock

RWB 21: Carol Carlson, Katherine Bonner, Gerry Genovese

RWB 23: Cheri Kavehersi

WFI: WFI Global Talent Innovation team and IT Administrator

**Q16. How were the regions selected?**

Regions were selected based on the desire to have a diverse Pilot Group to launch the project. In some cases they have experience with Salesforce or other CRM systems. Others were selected based on their use of some type of tool such as EFM or Excel, but do not have a CRM system. Those selected agreed to invest their time and resources to fully vet this new business development tool for increasing the number of employers they work with and also to better serve them in a more seamless engagement.

**Q17. Will the new CRM system be linked to Employ Florida Marketplace?**

Employ Florida Marketplace (EFM) is a statewide online search engine used by both job seekers and employers. Job seekers register in the system, upload their resumes and search for openings; employers register, upload job openings and search for candidates. EFM also captures discrete employer services input by RWB staff and reflects the region's overall employer penetration rate, as reported quarterly by DEO.

Ultimately the new CRM system will link to Employ Florida Marketplace so that state, regional and local workforce organizations are working within one system, and the hardships of dual entry are eliminated. Since Employ Florida Marketplace will soon get a major upgrade, however, the timing for this linkage has not yet been determined.

**Q18. What type of information will be captured and measured in the new CRM system?**

The goal is to create a powerful CRM tool to help workforce regional business development teams better plan and manage their employer outreach activities, better organize their outreach, communicate regularly and ultimately convert leads to satisfied clients. When implemented and as team members across the system gain experience in the Salesforce CRM, they will be able to increase their daily productivity. It will also enable individual team members to have up-to-date information on their portfolios and leadership to track and evaluate individual and team performance to ensure continuous improvement and refinement.

Key performance indicators (KPIs) have been collected to help frame up the CRM's customization or "look and feel." The EBE core team played a significant role in this effort.

**Q19. Is Salesforce secure?**

Security was one of the top priorities in the decision to purchase Salesforce as a statewide CRM platform. The system maintains secure data centers, secure transmissions, network protection, disaster recovery, system assessments and security monitoring.

**Q20. Will the regions receive training on the new system?**

Training will be an essential and integral part of the implementation of a new business development process and the introduction of a statewide CRM tool.

**Q21. When will the new CRM system be in place?**

The CRM system is being developed as part of a broader initiative to create a consistent, measurable process for business development statewide. Initial recommendations and a baseline CRM system will be completed by January 2014, with phasing, training and further enhancements to follow.