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## Alert Information

### **BusinessFirst! Webinar—New EP Features and Functions**

**Wed, Dec 13, 2017 1:30 PM - 2:30 PM EST**

Please join my meeting from your computer, tablet or smartphone.

<https://global.gotomeeting.com/join/646126261>

You can also dial in using your phone.

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Access Code: 646-126-261

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### **14 NEW THINGS – MODULES, FEATURES, AND ENHANCEMENTS**

We are releasing a number of new modules, features and enhancements for the ExecutivePulse CRM System. Many of these will impact you—regardless of how you use the CRM System. Please read and familiarize yourself with the 14 bullet points contained in this message. If you or your team have questions or want to schedule a web or training session on any of these items, please contact us at [support@e-pulse.net](mailto:support@e-pulse.net) or toll free at 866-832-5465.

#### **1. STREAMLINED NAVIGATION**

Our staff has been counting clicks and have found many places throughout the CRM system to streamline navigation. Go to any Portfolio and see how dramatically the right panel Gadget navigation has changed. From the Gadget, you can now update, delete, copy, etc. with one click. These menu choices are dynamically generated – based on the type of entity you are working with. So, choices for a Contact will be different than choices for a Project.

This streamlined navigation is also now embedded in grids throughout the system to include Power Search, Related Items,

and Search features.

Check it out! There is more to come!

## **2. EMAIL CAMPAIGN MODULE**

The all-new Email Campaign feature allows you to streamline communication, monitor & bolster response rates, and get relevant analytics on each Email Campaign. This feature can be used as a standalone option or – better yet – combined with our new Survey Builder (beta) for even more powerful functionality. Ask for a demo to see for yourself!

## **3. SURVEY BUILDER MODULE (beta)**

We are now providing the functionality of off-the-shelf survey building software (e.g., SurveyMonkey) within the ExecutivePulse CRM. Build your own surveys from within our CRM. There is no need to use a third-party survey system and deal with “data exchange” or “orphaned data.” Survey responses are linked directly to client Companies and Contacts within the ExecutivePulse CRM! Ask for a demo to see how this works.

## **4. ANALYTICS REPORT ENHANCEMENTS**

Within any Portfolio (Company, Contact, Group, Project, Tag, etc.) check out the new Profile Report. These reports provide a comprehensive and customizable view about the history of any entity in the CRM. This feature is made even better because we wrapped it in our new report booklet format featuring your logo, graphics, and more.

## **5. RESOURCE MODULE**

This new functionality allows you to “map” economic development organizations and related resource programs into the ExecutivePulse CRM. Once this data has been entered into the database system, you can easily create dynamically generated Resource Guides. For example: Show all business financing programs available in our community. This feature also allows you to create “automated” referrals for service. Interested? Contact us.

## **6. ENHANCED USER PREFERENCES**

We continue to expand user preferences and customization of the CRM so that everyone can configure the system to work the way they want. You already have the ability to select a masthead and corresponding color scheme, portfolio widgets, search and privacy options, and much more. We are now offering preferences for Analytics and Custom Reports. Instead of selecting criteria each time you run a report, you'll have the ability to set and save specific “default” reporting preferences.

## **7. ENHANCED CUSTOM REPORTS**

Speaking of Custom Reports.... have you run a Custom Report recently? If not, we think you are in for a pleasant surprise. We are now offering Custom Reports in a new, nicely formatted report booklet complete with your system masthead, modern graphics, and – in many instances – a table of contents. See for yourself. Many of these Custom Reports feature our new User Preferences so you can easily set up one-click analytics. Run a Custom Report today!

## **8. DYNAMIC DATA IMPORTER FEATURE**

Many of you already use our Data Importer feature to import large amounts of external data into ExecutivePulse. This feature employs our standard or your custom data import templates which we build and deploy for you. Many of you asked if we could allow you to create your own data import templates. This is now possible through our Dynamic Data Importer. We have expanded the Data Importer feature to allow you to create custom import templates based on the data that you have and want to import into the system. This is a feature for moderate to advanced users, but will be a huge time saver – even over our current Data Importer. Ask us for more information!

## **9. SHARING POWER SEARCH FEATURE**

Many of you that use the Power Search (user defined query) have asked if it is possible to share saved searches with other users. This sharing option is now a standard feature in the system. We are even allowing you to selectively share searches with groups of users. Contact us today to arrange a quick demo on how this feature works!

## **10. CLONING FEATURE**

We are now providing an easy way to copy information from one Contact or User to another. This feature should come in very handy when you are adding multiple Contacts working at the same physical business address or when you are adding multiple users from the same organization with similar access rights. To use the Clone feature, simply click on Options menu from within any Contact or User Portfolio. This feature is very easy to use. Try it!

#### **11. ECONOMIC DEVELOPMENT PROJECT FEATURE**

Many of you wanted an easy way to create Economic Development Projects in our CRM. This new feature provides almost endless possibilities for community, economic, and workforce development projects. Like Companies and Contacts, Economic Development Projects are primary entities (parents) in the CRM. You can do everything from creating Action Items to attaching Files to linking Contacts and/or Companies to these entities and much more. See for yourself!

#### **12. DISASTER RECOVERY FORMS, ANALYTICS, AND REPORTS MODULE**

We've all been witness to increasingly severe natural disasters. ExecutivePulse has worked with the Provinces of Alberta and British Columbia on a number of disaster recovery projects over the past few years. We believe that most economic developers should be planning for these types of events and are happy to provide this functionality to your CRM. If you are interested, let us know.

#### **13. MICROSOFT OUTLOOK ADD-IN MODULE**

Every couple of weeks, we upgrade and enhance our Microsoft Outlook Add-In. This is a very popular module for ExecutivePulse clients. The Microsoft Outlook Add-In provides seamless integration of Calendar Events, Contacts and Emails between Microsoft Outlook and the ExecutivePulse CRM. Important: Our Add-In is only available for Microsoft Windows. If you are a Mac user, there are other options to send email from your computer to the ExecutivePulse CRM. Ask us about our Add-In or other email options!

#### **14. OPTIMIZATION AND BUG FIXES**

As always, we continue to optimize the system – specifically in menus, reports, and searches. We also continue to squash any bugs that you bring to our attention.

There is much more on our radar screen for 2018!

As we have stated many times before, the feedback of users across Canada, the United States – and now, Australia – provides impetus for the design and development of new features and modules. Most system enhancements and bug fixes are also driven by your feedback.

Thank you for using ExecutivePulse!

To contact our support staff, please use the following:

Email: [support@e-pulse.net](mailto:support@e-pulse.net)

Toll free: 866-832-5465 (866-TEC-LINK)

On the web: <http://www.executivepulse.com>

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Training more than 4,500 Economic Development professionals!



## **CEcD Exam Prep Course** **Give your Career a Boost!**

**Convenient for anyone in:**  
**Illinois, Indiana, Kentucky, Michigan,**  
**Ohio, Pennsylvania, and West Virginia**

**What** IEDC CEcD Certification Exam Prep

**Why** Those taking this review have experienced a significantly higher pass rate compared to the overall exam rate.

**When** February 26-27, 2018

**Where** Business Solutions Center, 1435 Cincinnati Street, Dayton OH 45417

**Who** Limited to the first 30 individuals who sign-up

**Cost** \$300 - includes training manuals and meals

Whether you are just starting your pathway to becoming a Certified Economic Developer (CEcD), have taken the required classes, or have taken the CEcD exam (but need a little more preparation), this training will help you meet that goal.

Class time is reserved for those activities that are best done in a face-to-face setting, including practice sessions dealing with the short answer, essay, and the oral exams.

**Participants should expect to:**

- Enhance skills taking the short answer, essay, and oral exams for CEcD
- Learn how to answer exam questions
- Take exams, write, talk, and be graded on your effectiveness

**This course includes:**

1. 4 elements vital to earning CEcD certification
2. Learning and understanding the CEcD requirements
3. Planning to meet requirements
4. Preparing for the exams
5. Taking the exams

**To Register:**

Click button, fill-in the form (or just print), then mail form and your registration fee to the address on the form.

**REGISTER NOW!!**

**Contact for more information:**

Angela Swartz, (937) 225-4351 or [swartza@mcoho.org](mailto:swartza@mcoho.org)

**Nearby hotels:**

**Marriott:** 1414 S Patterson Blvd, Dayton OH (937) 223-1000

**Courtyard by Marriott:** 2006 S Edwin C Moses Blvd, Dayton OH (937) 220-9060

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**Call Angela Swartz at (937) 225-4351 or  
email [swartza@mcoho.org](mailto:swartza@mcoho.org) with any questions!**

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## Chapter Chair Corner



**Chuck Anderson,  
Chapter Chair**



**We have once again come to the holidays. After feasting on turkey, madly beginning the shopping craze, and decorating our homes for the holidays, we need to recall that it is all about giving to families, friends, and our communities.**

**Your Dayton SCORE volunteers thank you for the opportunity to serve you and our community. We wish you and your family a happy, joyous holiday season.**

## Profit Workshops



**In 2018, the Small Business Elements of Success series will again run from March through September.**

**[View the Success Series >>](#)**

**Dayton SCORE will once again offer workshops for those interested in starting a business or growing an existing business.**

**Single session start-up orientation and business growth workshops will be held at Dayton Metro Libraries throughout the year.**

**[View the 2018 Profit Workshops »](#)**

## Non-Profit Success



The non-profit workshop series began in the Fall of 2012 and has been conducted every Spring and Fall. Total attendance since inception has exceeded 2,000, and 105 different non-profit organizations have attended at least one of the six Fall sessions.

**Dayton SCORE just completed its Fall 2017 Non-Profit Workshop Series, which is targeted particularly to board members, management and staff of small non-profit organizations.**

**This very popular series included six topics which local non-profits indicate to us are most critical to their success:**

- \* Strategic Planning,
- \* Financial Management,
- \* Marketing,
- \* Fundraising,
- \* Volunteer Management
- \* Board Development.

**[View the 2018 Non-Profit Schedule »](#)**

## THE MEGAPHONE OF MAIN STREET: SMALL BUSINESS JOBS REPORT

FALL 2017

presented by  
**SCORE** 





SCORE's latest installment of "The Megaphone of Main Street" data report series delves into the story behind the changing face of U.S. small business hiring and employment.

[Read Report](#)

[Download Infographic](#)

## Upcoming Webinars

### Sharing Your Business Story Through Video

December 5 @ 1 p.m. EST / 10 a.m. PST



**The mission of online video platforms is to enable everyone to share their voice with the world.**

In this session, Corissa Saint Laurent, a speaker for Google's Get Your Business Online, will explain how to get the most out of your small business' story and share it through video.

[Register Now »](#)

### Advocate for Your Business

December 7 @ 1 p.m. EST / 10 a.m. PST



## Are you advocating for your business?

In this session, Joy Lutes, VP of External Affairs at NAWBO National (the first advocacy organization founded to represent all women business owners), will discuss how to get involved in government advocacy efforts that will strengthen your business.

[Register Now »](#)

## Florida Sales Tax Tales: Fact vs. Fiction

December 12 @ 2 p.m. EST / 11 a.m. PST



## Need some help understanding Florida sales and use tax laws?

During this webinar, Florida Department of Revenue presenters will dispel the myths and guide you through the facts about sales tax, website resources and other critical information.

[Register Now »](#)

## Are You Paying Your Employees Correctly?

December 14 @ 1 p.m. EST / 10 a.m. PST



## Is your small business compliant with employee payment laws?

In this webinar, Jessica Hubbard-Davis and Julia Darcy of Paychex will cover the most critical components of paying your employees.

[Register Now »](#)

## Simplifying Social Media for Solopreneurs

December 19 @ 1 p.m. EST / 10 a.m. PST



## Do you have a social media strategy?

In this webinar, Donna Amos, founder of Solopreneur Solutions, will share what she has learned while working with hundreds of clients. This webinar can help businesses of all sizes who need time-saving social media tips. (Sponsored by Canon.)

[Register Now »](#)

## 20 Things No One Tells Millennials About Entrepreneurship

December 28 @ 1 p.m. EST / 10 a.m. PST



## Are you a young potential entrepreneur with an amazing idea?

In this webinar, Ashley Williams, CEO and founder of RIZZARR, will share eye-opening truths that she learned as a millennial entrepreneur in hopes of empowering millennials looking to start a company.

[Register Now »](#)

## SCORE helps you succeed! Check out one of our recent success stories.



[Read More »](#)

Julie Maddox's son Benjamin was diagnosed with Type I diabetes at a young age. When he started playing sports in high school, Julie struggled to find suitably balanced snacks. That sparked the idea of what would become Benji Bars®. "I am beyond grateful to [my mentor] Bill Heitz and to SCORE because stepping out into unfamiliar territory is scary - but then I found a guide - and he believed I could do it." she says.

Sugar Beeze, maker of Benji Bars, was named Outstanding Woman-Owned Small Business at the 2017 SCORE Awards.

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What will you start, with help from a SCORE mentor?

[Connect with a Dayton SCORE mentor today](#)

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Dayton SCORE, Chapter 107  
[www.dayton.score.org](http://www.dayton.score.org)  
Phone: 937.225.2887



SCORE is a nonprofit association dedicated to helping small businesses get off the ground, grow and achieve their goals through education and mentorship. We have been doing this for more than 50 years.

Because our work is supported by the U.S. Small Business Administration (SBA), and thanks to our network of 10,000+ volunteers, we are able to deliver our services at no charge or at a very low cost.

Find out more about our Mission, Vision and Values [here](#).



December 5 , 2017

Bring Your Green 2.0 Updates:

- [1st Quarter Awards- What an event!](#)
- [New School Challenge-Poster Contest](#)
- [Green Mentors at Bishop Leibold](#)
- [Energy Tracking Training Session Presentation](#)
- [Call for All Participants. Water Tracking Points](#)

Events:

- [USGBC Holiday Social](#)
- [2018 OEFFA Conference: A Taste for Change](#)

Bring Your Green 2.0 Updates

## Bring Your Green 1st Quarter Awards - What a Luncheon!

What a great turnout! 100+ attended Bring Your Green 1st Quarterly Awards / DRG Sustainability luncheon on Nov 15 at Top of the Market.

Participants with most energy points were announced and recognized from the commercial and school sectors.

Beavercreek High School surprised us all by taking the lead on energy points coming from the 4th place on the schools leaderboard!



Beavercreek High School Receiving Award

The commercial sector results were no less exciting as 2 tied up for the first place. **Plastipk** stayed at the top of the leaderboard with both total points and energy points, while **Waibel** popped up from the 10th place at the leaderboard to tie in with Plastipak for energy points!





Plastipak Receiving Award



Waibel Receiving Award

Congratulations to our winners, and to all participants for bringing it on!

Next award luncheon will take place on February 21 with Waste focus. So mark your calendar, start lining up your points and join us then!

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## New School Challenge - Poster Contest to Reduce Food Waste!

Poster design group contest by DRG Food Team for 5th-7th grade classes with the theme of Buy What You Eat, Eat What You Buy to educate the public on best practices regarding food use.

Submit by March 30, 2018 for prizes and more points! Details [here](#)

### HOW TO REPORT YOUR POINTS :

Login to your page at [BringYourGreen.com](http://BringYourGreen.com)  
Select your building to the left of your screen  
Click on STUDENT CHALLENGES  
Click on WASTE NOT  
Select REDUCE FOOD WASTE challenge

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## Green Mentors at Bishop Leibold

Big thank you and appreciation to Katie Van Horn and Laina Serrer, volunteering Green Mentors from the University of Dayton, for helping out Bishop Leibold's 7th grade in their Air Mapper challenge. Ms Linda Hallinan says they were of great help!

**We have 3 other Green Mentor teams from UD ready to assist during your school year.** Email us at [drg3@mcoho.org](mailto:drg3@mcoho.org) if you're interested and we'll match you up.



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### Schools, EPA Assistance for your Sustainability Challenges!

Schools, are you considering which Clean Air challenges to take? EPA Region 5 Office is willing to provide training on how to perform Indoor Air Quality walkthroughs with your staff and your high school students in January 2018. If interested [contact Ben Weiss](#) for more information.

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### Energy Tracking Training Session Presentation

Did you miss the energy tracking training session in our Nov Awards Luncheon? No worries. [View the presentation at this link](#). Make sure to contact us if you have any questions.

Your baseline should be established if you have added your DP&L and Vectren account information in your summary page. If you're not a DP&L or Vectren customer, you can enter your baseline information (August 2016-July 2017) directly at the table view.

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## Call for All Participants. Water Tracking Points

Enter your square footage and number of employees per building to receive water reduction points. This is required in order to track your progress against established baselines.

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## Events

### USGBC Holiday Social

The USGBC Ohio SW Region Holiday Party and Bringing Back Greenbuild event is coming up very soon... Wednesday, December 13!

REGISTER NOW [AT THIS LINK](#)

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### Ohio Ecological Food and Farm Association's 39th annual conference

The Ohio Ecological Food and Farm Association's 39th annual conference, A Taste for Change, will be in Dayton Thursday, February 15-Saturday, February 17, 2018!

This not-to-be-missed event which draws 1,200+ people each year offers lots of amazing opportunities for farmers, backyard growers, home cooks, homesteaders, and others committed to local food, sustainable agriculture, and green living.

Go to [www.oeffa.org/conference2018](http://www.oeffa.org/conference2018) to learn more. Register early and save!

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