From ZERO to CRM



How one downtown district went from a multispreadsheet method of operation to a modern, unified system of data management





Established in 1989, the Downtown Winnipeg Business Improvement Zone (The BIZ) has become the voice of the downtown business community. Their primary mission is to promote, support and advocate for more than 1100 businesses to create a downtown that is clean, safe, and well-connected, where businesses can thrive, and everyone feels welcome.



Challenges

- Use of spreadsheets to store property, business, and member data. Accessing and updating the data was cumbersome, and susceptible to data integrity issues
- Siloed data greatly impeded productivity and efficient delivery of services
- Impossible to build reports to make data-driven decisions
- Inability to empower ambassadors to scale from reactive to proactive measures of maintaining a clean and safe downtown
- No way to see all public assets on a map, catalog them or associate them with any other property in the district

Goals



Implement a centralized system to unify data spread across various spreadsheets to improve accessibility, security, and integrity



Create a repository of reports to identify the operational efficiency and ability to communicate data with the stakeholders



Empower ambassadors with a simple tech tool to proactively drive safety and cleanliness measures



Catalog public assets with photo visualization capability and searchable, spatial attributes on Google maps

Outcomes



Cataloged properties by location, type and



Developed a custom Field Services app (iOS) for their ambassadors to help them identify and resolve case requests quickly

size in a searchable format with accompanying Google Map visual



Synced properties, businesses, tenants, and contacts to get a multi-dimensional view of their community operations



Cataloged public assets within the BIZ with location pins and photos to track and service them efficiently



Custom reports and dashboards enabled data-drive decision making to generate sustainable growth and development



Archived strategic and tactical initiatives provide data points when sharing success stories with the community





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