

Memorandum

TO: Economic Development Authority
FROM: Tom Simonson , Assistant City Manager and Community Development Director
DATE: June 1, 2026
SUBJECT: Discussion: Draft BR&E Strategy Plan
ITEM NUMBER: 5.b
SECTION: GENERAL BUSINESS

REQUESTED MOTION

No formal action required - discussion only.

INTRODUCTION

Staff and the economic development commission continue to work with the Golden Shovel Agency on developing a strategic plan to enhance our business retention and expansion (BR&E) program and connections to the business community. The draft plan has been completed and has been forwarded to the EDC for their review and discussion at their next meeting. A copy of the full draft plan is attached.

Staff would like to provide the EDA board an update on the project and specifically discuss a core recommendation of the strategy plan: purchasing and utilizing a CRM (Customer Relationship Management) software program. City staff, with assistance of two EDC commissioners experienced in the use of a CRM systems, has been evaluating various CRM software programs designed for business and economic development that would assist with tracking and reporting on BR&E actions and issues.

DISCUSSION

This BR&E project involves Golden Shovel providing assistance to the city to enhance our outreach and improve communications with the local business community, including:

- o Creating a new BR&E outreach strategy
- o Developing a business engagement campaign
- o Providing special software for tracking and follow-up actions
- o Marketing collateral materials

A five-member work group of EDC commissioners has had several meetings, providing input and comments on the drafting of the strategy plan.

Finalizing business outreach strategic plan should be completed in the next few weeks, followed by creating a business engagement campaign upon completion of new marketing content and materials. With support from Golden Shovel, the final phase will be a renewed effort to visit local businesses.

RECOMMENDATION

Staff would like to provide the EDA board an update on the BR&E project, and receive general support to move forward with acquiring a CRM software program to support the business and economic development program.

ATTACHMENTS

[Shoreview \(MN\) BR&E Marketing Strategy DRAFT](#)