2026 Economic Development CRM Guide

How to Select a CRM for Your Economic Development Organization

If you've been asked to identify and vet software for your economic development organization, you're in the right place.

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What's New in CRM for 2026

CRM is shifting from "a database with automation" to an intelligent operating system that drafts work, recommends next steps, and connects data across all your tools. For economic developers, that means less time on admin and more time with employers, projects, and investors.

1. Agentic AI and "Self-Driving" CRM

AI is moving from assistant to operator: drafting emails, logging meetings, summarizing calls, and even triggering workflows instead of waiting for staff to click buttons.

In practice for EDOs, that can look like:

- Auto-summarized BRE visit notes generated from call or meeting transcripts
- AI-generated follow-up task lists after a project or prospect meeting
- AI-driven suggestions for next touchpoints with at-risk investors based on engagement signals

When evaluating CRMs, ask:

- Does the AI simply "chat," or can it safely create and update records, tasks, and emails under clear controls?
- Can I easily review, approve, or roll back what it does, with guardrails and an audit trail?

2. Voice and Natural-Language CRM

Voice is becoming a normal way to interact with CRM: speaking notes into your phone, asking "show me at-risk employers in manufacturing," or dictating follow-up emails from the field. For field-oriented economic developers, this matters because BRE and project work often happens in cars, plants, and meetings—not at a desk.

When evaluating CRMs, ask:

- Can staff log visits, notes, issues, and assistance by voice from mobile?
- Can leadership ask natural-language questions like "Which projects over $10 million have no activity in 30 days?" and get a usable answer?

3. Composable CRM and Integrations

2026 CRM stacks are "composable": you choose best-of-breed tools (CRM, email, survey, GIS, incentives, BRE forms) and connect them with robust integrations instead of buying one monolithic system.

For EDOs, this means your CRM should either INCLUDE or integrate with:

- Outlook, Office 365, Teams, Zoom, Gmail, Google Meet, G-Suite, Office, Slack, QuickBooks
- Websites and content management systems
- Email marketing and marketing automation
- Survey tools and BRE forms
- Property databases (GIS, LOIS, GIS Planning)
- Incentive tracking and compliance systems
- Workforce and talent platforms
- Chamber or investor/membership systems

When evaluating CRMs, ask:

- Is there a mature integration ecosystem or marketplace supported by many third-party apps?
- How hard is it to connect to my existing tools and to future systems I haven't selected yet?

4. AI Governance, Data Quality, and Trust

As AI starts making decisions and acting inside CRM, organizations are focusing on governance: who can use which AI features, what data AI can touch, and how every action is logged. For public-sector and quasi-public economic development organizations, you also need to consider open-records, privacy, and data residency requirements.

When evaluating CRMs, ask:

- Can we configure AI permissions by role?
- Are AI-generated actions auditable and reversible?
- How does the vendor handle data privacy, residency, and model training?

5. Measurable Outcomes, Not Just Features

Modern CRM best practices emphasize starting with clear, measurable goals (for example, reduce admin time by 40%, increase investor renewal by 10%, improve BRE visit completion by 25%) and then using AI and automation to hit those targets.

For EDOs, this means your 2026 CRM selection should include a plan to track:

- Time saved per staff member on data entry and reporting
- Response times on RFIs, BRE issues, and investor/member requests
- Pipeline visibility for projects, expansions, and at-risk employers

This guide is designed to help you choose the best system for your organization, with a focus on real outcomes rather than features alone.

How Economic Developers Use CRM {#how-use}

Economic development teams do not operate like traditional sales teams, but there are clear parallels. Having an easy-to-use CRM that understands economic development is a critical foundation for success.

In general, CRM software is designed to track sales opportunities. A shared database of Companies and Contacts is a core element. **Companies, Contacts, and Opportunities (or Projects)** represent the three primary record types in most CRM systems.

For economic developers, you need to cover all aspects of your work—and ideally, the right system lets you "work your way" while still following best practices.

Your Team May Need to Manage

Projects and Initiatives:

- Projects (expansion, new, retention, redevelopment)
- Community projects and redevelopment
- Legislation and public initiatives
- Events
- RFIs and RFPs

Business Support:

- BRE visits and assistance
- Surveys
- Startup and small-business support
- Talent development and upskilling
- Planning and zoning interactions

Economic Development Focus:

- Incentives and incentive compliance
- Property and site development
- Investors, membership, and capital campaigns
- Business incubators and accelerators
- Grants and loans

- Workforce development and talent attraction
- Trade missions and delegations
- Tourism and business attraction

Data Model and Relationships

Most modern CRM systems allow you to attach documents to records and create additional record types when needed. Some include **Tickets** (for assistance and BRE tracking) and **Custom Objects** (for things like properties, grants, or incentives).

It's important to understand each object and how records relate to one another—your **data model**.

In HubSpot, for example, a contact can be associated with a company, a project, a BRE ticket, an event, and even a specific property at the same time. This relational structure lets you see the full story for a person or organization in one place.

Marketing Integration

If marketing, communications, and lead generation are important to your organization, be sure to factor that into your requirements. Some CRM systems have built-in marketing automation tools. Ideally, the CRM will connect to your website, digital marketing tools, and campaigns so you avoid a patchwork of standalone systems that may or may not talk to each other.

What Is a CRM? {#what-is-crm}

CRM stands for Customer Relationship Management. It refers to software that helps organizations track interactions with their current and future customers, employers, investors, and partners. The goal of implementing a CRM is to create a system your team can use to interact with prospects and existing relationships more efficiently and effectively—and to measure and report on those interactions.

Marketing and Communications Benefits

Marketing and communications teams often use a CRM to generate and nurture leads. With the right setup integrated to your marketing system, you can:

- Target companies in your database with digital ads
- Target contacts by type or segment
- Send marketing emails and see who is opening, clicking, visiting your website, completing forms, and engaging in chat
- Run social media campaigns and track engagement in one place
- Use direct mail that drives recipients to landing pages you can measure
- Use online chat and chatbots as lead conversion and support tools

Beyond Projects

Beyond projects, a CRM can help you manage:

- Talent attraction
- Workforce and upskilling programs
- Property and site development
- Community projects
- Investors and members
- Incentive compliance
- Grants and loans

With CRM, anyone using the system doesn't have to dig through email to remember where a conversation left off—the history is on the record.

Implementation Approaches

Some companies have developed CRM software specifically for economic developers. They typically do this in one of two ways:

1. **Build a solution from scratch** (custom code)
2. **Build a solution on top of a platform** (such as HubSpot, Microsoft, or Salesforce)

Invest in a CRM Platform {#platform}

A CRM platform can be configured to meet the core needs of economic development organizations, and each client's system can then be tailored to their exact requirements.

Examples: Microsoft, Salesforce, HubSpot

These large, stable companies work through networks of certified implementation partners. For example, Convergence, LLC is a HubSpot partner focused on economic development; Salesforce and Microsoft also have specialty partners in this space.

Advantages of This Model

- Widely supported, with powerful and secure back ends and world-class data centers
- Robust online training, documentation, and user communities
- Continuous upgrades and new features delivered as part of your subscription
- Mature integration ecosystems with thousands of third-party apps

Insider Tips

- **Support plans matter.** Only HubSpot provides live, unlimited phone/Zoom support in most packages. Salesforce and Microsoft charge extra and often only for larger clients.
- **Seek multi-year cost lock-ins** where possible
- **Look for connections to key third-party tools** (Slack, Outlook, Gmail, QuickBooks, GIS, survey tools, etc.)
- **Investigate online academies, certifications, and peer communities** that can help your team grow skills over time

Buyer Beware:

- Salesforce: Add ~30% of your license cost for Premier Support (if you qualify)
- Microsoft Dynamics: Minimum of 20 Professional Direct Support licenses at $180+/month each, plus user licenses
- HubSpot: Free live, unlimited phone/Zoom support in most packages

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Consider a Niche Software Provider {#niche-product}

Niche providers often understand economic development workflows very well and may deliver out-of-the-box EDO terminology, fields, and reports. Their advantage is domain expertise and a narrower focus.

However, there are significant tradeoffs to consider:

Advantages

- May offer lower license costs upfront
- May include specific EDO reports and forms tailored to your organization type

Challenges

- Little or no native marketing functionality or CMS/website tools
- Additional software (for email, surveys, project management, etc.) is usually required
- Outlook and Gmail integrations may not be as seamless or well supported as larger platforms
- Fewer third-party apps and integrations; most vendors don't build to these smaller systems
- Stability and long-term viability of the company should be evaluated carefully
- Limited ability to configure or enhance the system yourself—you may need to pay the vendor for many changes

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Clean Data Is Good Data {#clean-data}

Company and contact data is dynamic—people change jobs, companies grow or relocate, and new programs and relationships emerge over time. The longer you operate in a community, the more your universe of relationships grows and diversifies.

You need a system that helps you:

- Import data easily from spreadsheets and legacy systems
- Keep records deduplicated and clean over time
- Enrich or validate data so your team trusts what they see

Look for tools that simplify importing, deduplication, standardization (for example, industries, NAICS codes, locations), and ongoing list hygiene.

Why CRM for Economic Developers?

Economic development projects are the equivalent of enterprise-level deals—often multi-million-dollar investments with long-term community impact. It's hard to imagine a company working on deals of that magnitude without a modern CRM.

As an economic development leader, you manage details that directly affect jobs, tax base, and perception of your community. Managing those details well is essential.

Insider Tips

- Look for drag-and-drop functionality to easily update projects as they move through your stages
- Make sure it's easy to see all active projects in a single view
- Use views or dashboards that flag projects with no activity after a set number of days (for example, 7, 14, or 30 days, depending on your cycle)

The Value of Data and Contacts

Having a list of community contacts, site selectors, local businesses, and partners is a major asset. Great care must be taken of that data.

At its core, a CRM is not just a tool for large companies—it is essential infrastructure for economic developers.

Complete Contact Profiles

Contacts are key. You'll want a complete, at-a-glance profile of each person you work with, including:

- Realtors (commercial and residential)
- Site selectors
- Consultants
- Educators and workforce partners
- Local business owners and executives
- Engineering firms and service providers
- Investors and members
- Vendors and contractors
- Media and influencers
- Committees, boards, and advisory groups

You Should Be Able to See

- History of interactions (emails, calls, meetings, notes)
- Social media profiles, if relevant
- Which companies, projects, grants, tickets, and programs each contact is connected to

Important Note: Not all CRM systems make it easy to associate one person with multiple entities. Be sure to see how a single contact can be associated with multiple companies, projects, and other records and how easily you can navigate those relationships.

Structure: Records and Relationships {#structures}

Most economic development CRM setups are built around a few core record types:

- **Companies**
- **Contacts**
- **Projects / Deals / Opportunities**
- **Tickets** (for assistance, issues, and BRE)
- **Additional records** like Investors, Leases, Properties, Grants, Loans, Events, and Programs

Company Records

Each company needs a profile where you can:

- Categorize the company (existing industry, prospect, startup, key employer, investor)
- See all associated contacts, projects, tickets, and properties
- Track key metrics such as jobs, capital investment, square footage, and programs used

Tickets/Cases (Assistance and BRE)

Tickets or cases are ideal for tracking "assistance provided" and BRE visits. If you offer any of the following, you may want to track the time, effort, and results:

- Consulting or mentoring
- Workshops and training
- Assistance with loans, grants, or special programs
- Responding to citizen or business owner requests
- Networking and outreach efforts
- Disaster relief support
- Community initiatives and partnerships
- Collaboration with workforce and talent partners

Properly configured, this data feeds your KPIs and tells a compelling story about your team's impact.

Projects / Deals

Projects are typically grouped by type and stage. You'll want to capture:

- Project type (new, expansion, retention, redevelopment, etc.)
- Stage in your funnel or pipeline
- Workforce requirements and talent needs
- Desired property characteristics and site requirements
- Incentives considered, offered, and accepted
- Jobs created, jobs retained, capital investment, and other outcomes
- Incentive and project compliance milestones

Properties and GIS

You may use CRM to track properties and sites submitted as part of projects or RFI responses, as well as sites your organization owns, markets, or helps assemble.

Recommended GIS tools:

- GIS Planning
- LOIS
- GIS Webtech
- SiteHunt

Because real estate is dynamic, GIS tools are still recommended. Your CRM should at least link to these tools and to key property records.

Activities Feed Your KPIs

Activities—emails, calls, meetings, notes, tasks—are the raw material for many of your KPIs. Reporting on activities helps you:

- Show where staff is spending time
- Demonstrate proactive outreach to existing industry and prospects
- Provide continuity when a staff member changes roles or leaves

The entire team should be able to see recent activities for any project, company, ticket, or contact in a single view.

Who Should Consider CRM?

Any organization that needs to maintain relationships over time can benefit from CRM. Economic developers in particular need to track leads and "customers" across long cycles, from initial discovery through expansion and integration into the community.

Ask yourself:

- Do we need a central, shared list of information on our leads, projects, and existing industry accounts?
- Is this information scattered across spreadsheets, inboxes, and personal notes today?
- Are our contacts and companies regularly interacting with multiple members of our team?
- How does everyone keep track of where each conversation left off?

If you answered "yes" to any of these, a CRM system can likely help your organization.

Benefits of CRM

There are many reasons to adopt CRM, but three major benefits for economic developers are:

Better Lead and Relationship Intelligence

- See when a prospect or company is visiting your website, opening your emails, or engaging with content
- Understand which channels and campaigns are generating the right types of companies and projects

Better Alignment Across Teams

- Real-time reporting holds everyone accountable and creates a shared view of goals and pipelines
- Customer service or BRE communications can be documented for account managers and leaders to reference

Prioritized Activities and Closed-Loop Reporting

- Use lead or project scoring to prioritize who to call or visit first
- Connect marketing and outreach to actual outcomes (jobs, investment, renewals), so you know what is working and can adjust

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8 Must-Have CRM Features {#must-haves}

Before anything else, a CRM system has to be useful and usable for your team.

1. Contact Management

- Create contact records and store relationship information with as little manual data entry as possible
- Look for tools that sync with Outlook or Gmail and enrich contacts automatically

2. Deal / Project / Opportunity Stages

- Customize stages to match your project pipelines (new projects, expansions, BRE issues, investors, grants, etc.)
- Use multiple pipelines when you have different processes for different opportunity types
- Make sure it's easy to move a project from one stage to the next (drag-and-drop is ideal)

3. Daily Dashboard

- Users should have a clear view of their tasks, open projects, and key metrics
- Leaders should see aggregated pipelines, activity levels, and progress to goals

4. Task Management

- Avoid forcing staff to bounce between multiple tools just to see their to-dos
- Look for task queues, recurring tasks, reminders, and automation that creates tasks based on activity

5. Content Repository

- Save commonly used documents (program sheets, incentive overviews, pitch decks) in one place
- Use email templates and snippets so staff isn't starting from scratch with every outreach

6. Automated Data Capture

- Emails and calls should be logged automatically wherever possible
- Avoid systems that require excessive copying, pasting, or manual uploads just to capture activity

7. Reporting and Dashboards

- Your team should be able to build or modify key reports without a developer
- Make sure you can easily export or share dashboards with boards, councils, and stakeholders

8. Mobile Access

- Staff should be able to use the CRM effectively from a phone or tablet
- This includes logging notes by voice, scanning business cards, and seeing nearby companies while in the field

Bonus Feature: Integration with Marketing Automation

- Integrating marketing and CRM gives you a full lifecycle view of each prospect and company
- A gap here often leads to lost information, duplicate tools, and missed opportunities

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Conclusion

To get the full value of CRM, you need a system that fits how economic developers actually work today and that can grow with you as AI, integrations, and expectations evolve. Picking the right system, implementing it thoughtfully, and enforcing best practices will pay off in better visibility, stronger relationships, and more time spent on high-value work.

Recommended Next Step: Define Your Requirements {#requirements}

Watch a Short Video - How To Define Your Economic Development CRM Requirements

Use the requirements checklist to see how the right system can help you and your team.

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Or use the HubSpot meeting scheduling tool below.

(This is just one of the incredible tools our clients use to save time)