



PROPOSAL FOR CRM SERVICES

CRM Database for Economic Workforce Development

Submitted To	DuPage County Workforce Development Division Finance Dept, Procurement Division, Room 3-400 421 North County Farm Road, Wheaton, IL 60187
RFP Number	26-048-WIOA
Submission Date	June 8, 2026
Submitted By	Executive Pulse Inc. 155 East 10th Street, Erie, PA 16501 866-397- 8573 smichaels@e-pulse.net executivepulse.com
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Cover Letter

June 8, 2026

DuPage County Finance Department
Procurement Division, Room 3-400
421 North County Farm Road
Wheaton, Illinois 60187

Re: Proposal - CRM Database for Economic Workforce Development, RFP 26-048-WIOA

Dear Evaluation Committee,

Thank you for the opportunity to respond to this solicitation. Executive Pulse Inc. is pleased to submit this proposal to provide the DuPage County Workforce Development Division with a purpose-built CRM platform for employer relationship management, workforce program tracking, grant administration, and performance reporting.

We acknowledge receipt of all addenda issued as of the submission date.

This proposal is organized as follows: Cover Letter, Firm Qualifications, Key Qualifications, and Project Understanding. Pricing is submitted as a separate attachment per the instructions.

Executive Pulse is not a general-purpose CRM adapted for workforce and economic development work. We were built from the ground up for this specific purpose, by a practicing economic developer who ran BR&E programs and needed tools that did not exist. The result is a platform used by more than 2,100 economic and workforce development professionals across the United States and Canada, including statewide deployments in Pennsylvania, Ohio, Alberta, and British Columbia.

We are familiar with exactly the challenge DuPage County WDD is describing. Organizations doing serious employer engagement and workforce program coordination regularly outgrow HubSpot and spreadsheets, not because those tools are bad, but because they were never designed for the relationship continuity, outcome tracking, and grantor reporting that workforce development work demands. What DuPage County WDD needs is a platform whose data model was built around employer engagement and program outcomes from the beginning, not one that requires workarounds to approximate those functions.

We are confident this proposal demonstrates the right fit, and we welcome the opportunity to discuss it further.

Respectfully submitted,

Signed by:

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Sean Michaels

President and CEO, Executive Pulse Inc.

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Section 1 - Firm Qualifications

About Executive Pulse Inc.

Executive Pulse Inc. is a Software-as-a-Service company headquartered in Erie, Pennsylvania, founded in the mid-1990s by Laith Wardi, a Certified Economic Developer (CEcD) who built the first version of ePulse while running Business Retention and Expansion programs in Northwest Pennsylvania. The company has one office, in Erie. All platform development, client support, and account management is handled by the Erie-based team.

ePulse is 100 percent focused on economic and workforce development organizations. We do not serve sales teams, marketing departments, or general business operations. Every feature, workflow, and report in the platform was designed for the specific needs of organizations that manage employer relationships, administer programs, and report outcomes to funders and stakeholders.

Platform scale: 2,100+ users across the United States and Canada in 34 states and provinces. Statewide deployments include Pennsylvania (1,300+ users across 67 counties through Pennsylvania DCED), Ohio (statewide with JobsOhio data integration - the only third-party vendor with approved data exchange), Alberta, and British Columbia. Long-term client relationships include Montgomery County, Ohio at 21 consecutive years and the Fort Worth Regional Chamber coordinating 21 jurisdictions on a single platform.

The platform is SOC-2 Type II certified, audited annually by an independent third party (A-LIGN, September 2025). Data residency is United States. The platform supports multi-factor authentication, role-based access controls, and native Microsoft 365 integration including Outlook, Teams, and OneDrive/SharePoint.

Relevant Public Sector Experience

- Pennsylvania Department of Community and Economic Development. Statewide deployment serving 1,300+ users across all 67 Pennsylvania counties. Multi-year relationship. The largest single ePulse deployment and the primary reference for public sector scale and statewide program management.
- Montgomery County, Ohio. 21 consecutive years of continuous service. Community and economic development use case with employer relationship management at the core. Primary reference for long-term platform stability and client retention.
- Fort Worth Regional Chamber. 21-jurisdiction regional coordination on a single ePulse deployment. Reference for multi-stakeholder employer engagement, shared data governance, and cross-boundary program reporting.

- Government of Manitoba. Provincial deployment for economic development and investment attraction, demonstrating platform adaptability across government structures and program types.
- British Columbia Economic Development Association. Provincial deployment. Reference for multi-jurisdictional coordination and partner data sharing across a large geography.

Differentiators

Purpose-built. ePulse is not Salesforce or HubSpot configured to approximate economic and workforce development workflows. The data model, the terminology, the reporting structure, and the training content were all designed from the ground up for this work. This matters operationally: fields exist for employer hiring demand, workforce challenges, BR&E visit outcomes, and program participation because they were built in, not bolted on.

Practitioner origin. The founder is a certified economic developer who has taught BR&E methodology at IEDC since 1996. Product decisions are made by someone who has run the programs our clients run. When DuPage County WDD says they need to track employer needs and report outcomes to grantors, we already know what that means because we built the system to do it.

Platform maturity. The CTO has been with the company for over 20 years. The senior database administrator has been in the role since 2008. The senior software engineer has been with the team since 2013. Clients do not inherit a startup's growing pains. They get a platform that has been continuously refined through 30 years of real use in the field.

Unlimited user model. Pricing is not per seat. For public sector organizations managing multiple staff roles across programs, this eliminates the per-user friction that makes generic CRM platforms expensive to scale and discourages broad adoption. All six WDD users operate under a single annual license.

Direct support. There is no call center tier and no offshore support function. The team that builds the platform is the team that supports it. Clients know their support contacts by name.

Business Licenses and Certifications

Executive Pulse Inc. is incorporated in Pennsylvania. Federal Tax ID on file. SOC-2 Type II certification (A-LIGN, September 2025) available upon request under appropriate confidentiality terms. VPAT 2.5 (WCAG 2.1 AA and Section 508 conformance) included with this submission.

References

Erik Collins

Community and Economic Development Manager | Montgomery County, Ohio

Francesca Zacks, Customer Success Associate. Frannie serves as the primary relationship contact for DuPage County WDD once the platform is live. She manages account health, coordinates onboarding activities, monitors platform adoption, and ensures staff have what they need to get full value from the system. Frannie is the person WDD staff will hear from on check-ins, training follow-ups, and day-to-day questions about getting the most out of ePulse. Technical issues escalate to Ryan; contract and strategic matters go to Sean. Location: Erie, PA.

Areas of Expertise by Role

Team Member	Primary Areas of Expertise
Sean Michaels	Implementation management, client onboarding, training delivery, account strategy, public sector procurement
Laith Wardi	BR&E methodology, economic and workforce development practice, IEDC training, strategic program design
Ryan Narpes	Platform architecture, API integration, Microsoft 365 ecosystem, technical security, custom development
Chris Camilleri	Database administration, data migration, performance management, backup and recovery
Keven McQueeney	User support, system analysis, training delivery, platform configuration, ongoing account management
Brayden Hayes	Feature development, platform maintenance, integration support, custom module development
Francesca Zacks	Customer success, account health monitoring, onboarding coordination, platform adoption, client relationship management

Communication and Interaction

The ePulse team is structured for direct, personal access. DuPage County WDD staff will know Sean, Frannie, and Keven by name from the start of the engagement. Frannie Zacks serves as the primary day-to-day customer success contact, handling account check-ins, onboarding coordination, and routine questions. Keven McQueeney supports platform configuration, user questions, and report requests. Sean Michaels is available directly for escalations, strategic questions, and contract matters. For technical issues, Ryan is reachable the same day. There is no call center. There is no offshore support function. There is no ticketing system that routes to an unfamiliar agent. The team that built the platform and has been running it for 20-plus years is the team that answers the phone.

This matters for a workforce development organization managing active grants, employer relationships, and reporting obligations. When something needs to be resolved quickly, DuPage County WDD needs to reach the right person, not navigate a support tier.

Section 3 - Project Understanding

ePulse's interest in this engagement is straightforward. DuPage County WDD is doing exactly the kind of work ePulse was designed to support: managing ongoing employer relationships, running BR&E programs, administering workforce grants, and reporting outcomes to grantors. HubSpot is a sales tool. It is not a bad product; it is the wrong product for this work. The fragmentation DuPage County WDD is experiencing - a general-purpose CRM supplemented by spreadsheets - is the condition that almost every new ePulse client comes from. The organization outgrows the tool, the workarounds multiply, and the data the organization actually needs for program management and funder reporting lives in too many places to be useful.

ePulse replaces that condition with a single system built around the data model economic and workforce development organizations actually use: employers at the center, with relationships, interactions, program activities, and outcomes all connected and reportable in one place.

The following addresses each functional area in the scope of work.

6.1.1 Employer Relationship Management

This is ePulse's core function. Every feature described in the RFP is native to the platform.

- Employer profiles include industry classification by NAICS code or a custom taxonomy defined by the WDD, company size, location, key contacts with individual relationship histories, and an unlimited number of custom fields the WDD defines during configuration. No limit on profile fields, no extra charge for customization.
- Interaction logging captures calls, emails, meetings, site visits, and notes, each tagged by date, staff member, and outcome. The full interaction history is searchable and filterable by any criteria. Staff transitions do not result in lost relationship context because the institutional memory is in the system, not in someone's email inbox or personal files.
- Employer needs, hiring demand, workforce challenges, and referrals to services are tracked as custom data fields and activity records linked directly to the employer profile. These can be reported on in aggregate to identify patterns and trends across the WDD's employer base - which sectors are flagging workforce challenges, which employers have pending referrals, which contacts have gone cold.
- Sector tagging, geography, program participation, and any other categorization criteria the WDD uses are supported as standard segmentation tools. Lists built from these criteria drive targeted outreach campaigns, surveys, and performance reporting without manual filtering or spreadsheet exports.

- Follow-up reminders and task assignments are native. Staff can assign tasks to themselves or colleagues, set due dates, and receive automated notifications. Lapsed contacts - employers who have not been touched in a defined period - are surfaced through dashboard alerts or scheduled reports so nothing falls through the cracks.
- BR&E visit tracking is a specific ePulse capability, not a workaround. Pre-visit planning, visit documentation, post-visit follow-up, and outcome recording follow the same workflow Laith Wardi has taught at IEDC for 30 years. The BR&E workspace tracks each company's visit status - due, overdue, not yet visited - with economic impact scoring to prioritize outreach. This is where ePulse started and it remains the most developed module in the platform.

6.1.2 Workforce Program Tracking

ePulse's native strength is the employer side of workforce program management. The platform tracks employer participation in programs, services provided to employers including consulting, training coordination, job placement assistance, and apprenticeship and internship facilitation, and the full linkage between employer records and program activities.

For participant-side tracking - enrollment, individual outcomes including wages and credential attainment - ePulse handles this through configurable custom modules. This is not the same as a dedicated WIOA management information system, and we will say that directly. What ePulse does is link employer records to training cohort records, track participation counts and program outcomes at the employer level, and report aggregate outcomes by program, employer, geography, and time period. For DuPage County WDD's current scale and stated use case - managing and documenting ongoing employer relationships with program and grant tracking - this approach covers the functional requirements described in the RFP.

If DuPage County WDD requires deep WIOA case management at the individual participant level, that is a scope question we recommend discussing during implementation planning. ePulse is designed to work alongside dedicated WIOA management systems where those are in place, serving as the employer-facing relationship and program management layer while the case management system handles participant eligibility, enrollment, and compliance documentation. Many WDD clients use this complementary model effectively.

- Workshop, event, and educational activity tracking including attendance and outcomes is supported as standard activity records linked to employer and program data. Events can be connected to multiple employer records and reported in aggregate.

6.1.3 Grant and Project Management

Grant tracking in ePulse is built around linked records, not spreadsheets. Each active grant is a record in the system with fields for funding source, award amount, performance period, compliance requirements, and associated employer contacts and program activities. A staff

member reviewing any employer record can see which grants that employer's activities are associated with. A program manager reviewing any grant record can see which employers and activities are linked to it.

- Task and milestone management supports assignment of responsible staff, due dates, and status tracking. Document storage for grant files - applications, agreements, reports, correspondence - is handled through the native Microsoft SharePoint and OneDrive integration that DuPage County WDD is already using. Grant documents are linked to the grant record and accessible from within ePulse without switching applications.
- Deliverable tracking and reporting deadlines are managed through the task system with configurable alerts. Staff receive notifications when deadlines are approaching. Funder requirement fields are custom-configured during implementation to match DuPage County WDD's specific grant portfolio. If a particular grantor requires specific outcome metrics, those fields exist in the system from day one.
- The linkage between grant records and related employer contacts and workforce program activities is native and bidirectional. A single employer record can display all associated program participation, grant activities, interaction history, and pending tasks in one view. This is the condition the WDD needs for credible grantor reporting without manual data assembly.

6.1.4 Reporting and Key Performance Indicators

Dashboards in ePulse are real-time and configurable by user role. Program staff see what is relevant to their function. Leadership sees aggregate program and engagement metrics. No one has to run a report to see where things stand - the dashboard answers the most common questions at a glance.

- Report generation supports filtering by employer, program, staff member, date range, geography, and any custom field in the system. This means DuPage County WDD can produce the exact report a funder requests - employers served by sector, training participants by program, outcomes by date range - without manual data assembly from multiple sources.
- Standard outcome metrics tracked include employers served, contacts made, jobs created, jobs retained, and training participants. Additional KPIs are configured during implementation to match DuPage County WDD's grantor reporting requirements. If a funder needs a specific metric, that metric gets built into the system during setup.
- Export formats include Excel, PDF, and CSV. Board-ready reports can be formatted for presentation. Reports can be scheduled for automatic generation and distribution by email on any recurring schedule - weekly, monthly, quarterly - without staff intervention.
- The report builder allows WDD staff to create and save custom reports without IT involvement. Saved reports can be shared across the team and updated as program requirements change.

Technical Requirements

ePulse meets all technical requirements in Section 6.2 of the RFP. The platform is cloud-hosted SaaS with no on-premises installation required. Access is through any modern web browser and through mobile apps for iOS and Android. No proprietary client software is required on WDD workstations.

Microsoft 365 integration is native. The Outlook Add-In allows WDD staff to log emails, calendar events, and action items directly from Outlook into employer and contact records without leaving their email client. Teams and SharePoint/OneDrive integration enables document storage and collaboration within the ePulse workflow. Calendar sync keeps visit schedules and task deadlines visible in both systems.

Six named user licenses are within standard deployment parameters. Role-based access controls allow the WDD administrator to define permissions by user function - program staff, administrators, and read-only stakeholders each see appropriate levels of access.

Data is encrypted in transit using TLS 1.2 or higher and at rest using AES-256 encryption. Uptime SLA is 99.5% or higher, measured monthly and excluding scheduled maintenance windows. Backup and disaster recovery procedures with documented Recovery Time Objective and Recovery Point Objective are available upon request.

WCAG 2.1 Level AA and Section 508 conformance: ePulse's current VPAT at version 2.5 is included with this submission as required.

Data Security

- SOC-2 Type II certification is current, issued by A-LIGN in September 2025. The certification covers Security, Availability, Processing Integrity, Confidentiality, and Privacy. Annual independent audits are conducted on a fixed schedule. The most recent audit report is available to DuPage County WDD upon request under appropriate confidentiality terms.
- All data is stored in the United States. Data centers are located in the continental US. Geographic locations of specific data centers are disclosed to clients upon contract execution.
- Multi-factor authentication is required for all user accounts. There are no exceptions. Role-based access controls are configurable by the WDD's designated system administrator to limit user permissions by job function.
- Vulnerability and penetration testing is conducted on a regular schedule. Identified vulnerabilities are remediated according to severity classification. Process documentation, testing frequency, and remediation timelines are available upon request.

- In the event of a data breach or security incident affecting WDD data, ePulse will notify the WDD within 72 hours of discovery. Incident response procedures are documented, tested, and available for review upon request.
- Third-party subcontractors or services with access to WDD data are limited to ePulse's cloud hosting provider. The identity of that provider and the governing data processing agreement are disclosed to clients upon contract execution.

Implementation

ePulse's standard implementation for a new client at DuPage County WDD's scale runs six to eight weeks from contract execution to go-live. The timeline below reflects a structured onboarding process, not a rushed deployment.

Weeks	Activities
1 - 2	Discovery and configuration. Kickoff meeting with WDD staff. Requirements gathering covering workflows, terminology, existing data structure, and grantor reporting requirements. System configuration and customization including custom fields, data categories, sector taxonomy, and user roles. User access setup and permission configuration.
3 - 4	Data migration and integration. Migration of existing employer, contact, and program records from Excel, CSV, and HubSpot export at no additional charge. Microsoft 365 integration configuration and testing including Outlook Add-In, Teams, and SharePoint/OneDrive. Custom report finalization based on WDD grantor reporting requirements.
5 - 6	Training and testing. Live web-based training sessions for end users and system administrator delivered via Microsoft Teams, scheduled around WDD business hours. Sessions recorded and provided to WDD for onboarding future staff. User acceptance testing with WDD staff. Refinements based on feedback. Full documentation package delivered.
7 - 8	Go-live and stabilization. System launch. Post-launch monitoring and support. Proactive check-ins at 30, 60, and 90 days post-launch to address any operational questions and optimize configuration based on early use patterns.

Training

End-user training is delivered live via web conference using Microsoft Teams, scheduled around WDD business hours. Sessions are recorded and provided to WDD for reference and for onboarding future staff. Training is tailored to user roles so program staff and administrators each receive instruction appropriate to their function in the system - program

staff do not sit through administrator training, and administrators get the full depth of configuration capability.

Administrator training covers user management, permission configuration, custom field management, report building, and system maintenance. The designated WDD administrator receives additional one-on-one time with Keven and direct ongoing access to the ePulse support team for questions that arise after go-live.

User documentation includes role-based user guides, a system administrator manual, and a searchable online knowledge base maintained and updated with each platform release. Materials are provided in PDF and online formats. Training recordings are hosted and accessible to WDD staff on demand.

Ongoing Support and Maintenance

Technical support is available by phone, email, and in-app ticketing. Support is staffed by the ePulse team during business hours with on-call coverage for critical issues around the clock. Response time commitments are as follows: critical issues (system down or inaccessible) within 2 hours, 24/7; high priority issues (major functionality impaired) within 4 business hours; standard issues (questions, configuration requests, minor bugs) within one business day.

Platform updates, bug fixes, and security patches are included in the annual subscription cost. There are no separate maintenance fees. Updates are communicated to clients in advance with release notes describing what changed and what, if anything, the administrator should know before the update deploys. Scheduled maintenance windows are communicated with a minimum of 48 hours notice. Material platform changes that affect WDD workflows are discussed with the account lead before they go live.

Self-service resources include a user knowledge base, a release notes archive, and direct access to the ePulse support team. WDD staff who have a quick question during the workday can reach Keven directly. They do not have to open a ticket and wait for a response from an unfamiliar agent.

Performance Metric Guarantees

- 99.5% or higher platform uptime, measured monthly, excluding scheduled maintenance windows. Uptime reporting available to WDD upon request.
- 72-hour breach notification from time of discovery, with documented incident response procedures.
- Data migration completion and validation confirmed with WDD prior to go-live. No go-live until WDD has reviewed and approved migrated data.
- Training completion for all named users before go-live sign-off. WDD does not inherit a live system before staff are ready to use it.
- Critical issue response within 2 hours, 24/7, for system-down conditions.

- 30-, 60-, and 90-day post-launch check-ins included as standard practice, not optional add-ons.