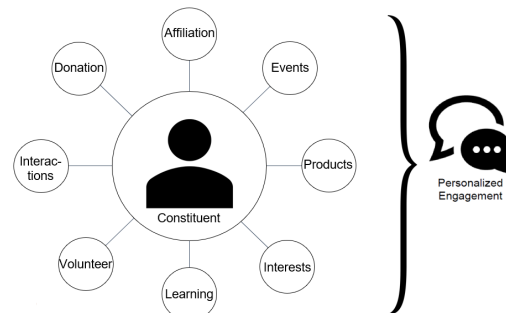


Roadmap to Customer Relationship Management (CRM)

Why A CRM and Integrated Reporting?

- Improves continuity for the customer experience
- Contributes to compliance (REG data)
- Creates efficiencies in sharing impacts
- Provides accessible and actionable real-time data
- Integrates with the Ohio State Enterprise Project



What's the Current Status?

OSU Extension administration determined Salesforce was the preferred CRM based on adoption by Ohio State's Enterprise Project and other land-grant university Extension teams. The initial discovery prioritized the Master Gardener Volunteer program as the initial pilot due to the urgency of transitioning their Volunteer Management System that was being discontinued. That project is currently being launched for usage by coordinators and volunteers.

Summit Technologies was selected as our partner due to their extensive Salesforce certifications and work with other Ohio State units.

What's Next?

Participants will be invited to attend discovery sessions which will inform decisions on developing a multi-year roadmap that links processes, platforms, and people. Implementation and adoption will be prioritized by functional area based on impact, urgency, risk, complexity, and budget. Existing and new investments will be leveraged for the project. The discovery and roadmap for the scope of this discovery and roadmap effort will start in April and continue through summer.

The units engaged in discovery include CFAES External Relations, Government Affairs, Advancement, workforce development, reporting, data integration, e-learning, publications/products, operations, events, Extension communications, Knowledge Exchange, partnerships, Master Gardener Volunteers, and IT. During the meetings, group participants will share information about the current state of functions and technologies to inform decisions regarding the future state of system the leverages the best of CFAES.

This project aligns with Extension leadership's focus on strategic action. For questions, contact Jackie Kirby Wilkins or Julie Fox.

