

# Customer Relationship Management

## Roadmap to Processes, Platforms, People

Spring 2021



**THE OHIO STATE UNIVERSITY**

COLLEGE OF FOOD, AGRICULTURAL,  
AND ENVIRONMENTAL SCIENCES

[extension.osu.edu](https://extension.osu.edu)

THE OHIO STATE UNIVERSITY COLLEGE *of* FOOD, AGRICULTURAL, *and* ENVIRONMENTAL SCIENCES

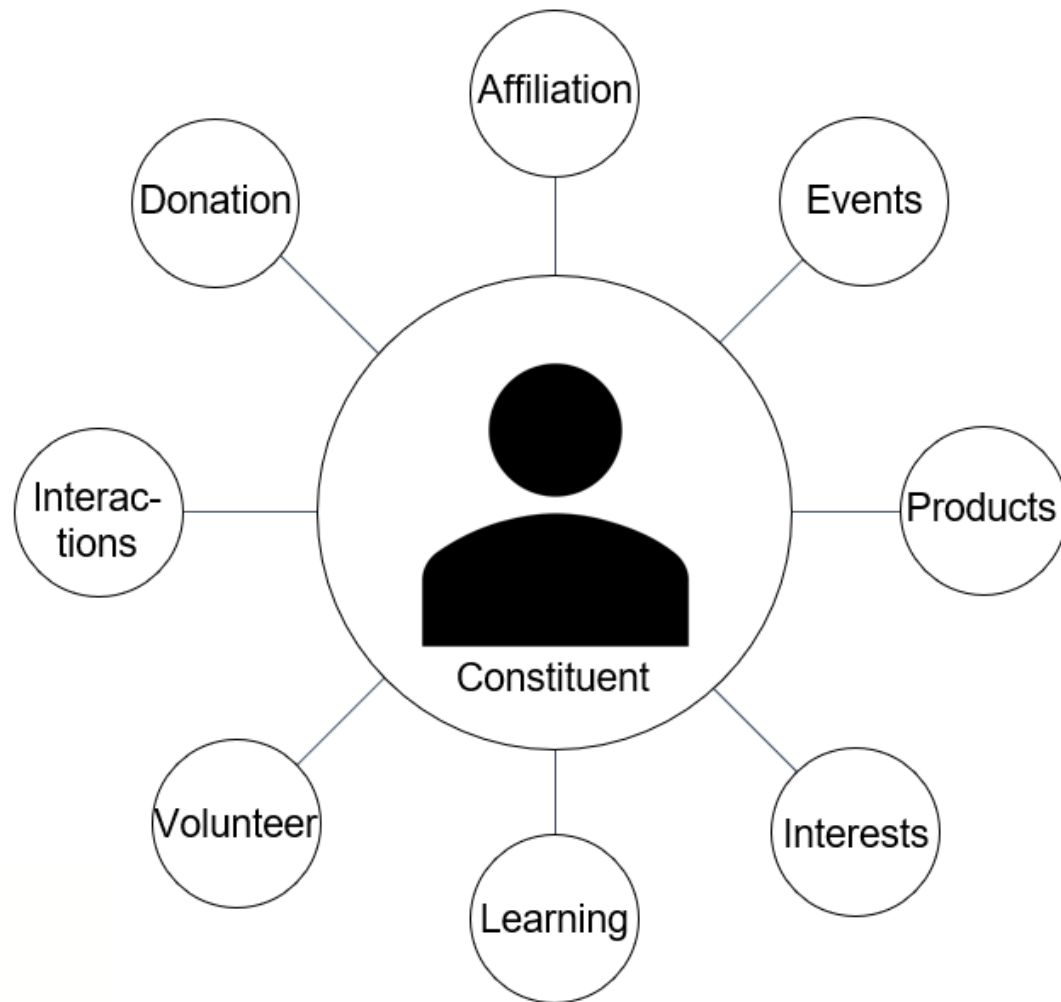
# WHY A CRM & INTEGRATED REPORTING?

**WITH OSU EXTENSION** I need to connect with...



**OSU EXTENSION EASY ACCESS**

# THE VISION: CONTINUITY IN THE CUSTOMER JOURNEY



Compelling Value

Strategic Implementation

Easy Adoption

Accessible Real Time Data

Leverages Existing and  
New Investments

# **SALESFORCE** EXPLORATION SUMMARY

## **Phase 1** *Explore CRMs*

*Salesforce adopted by Ohio State and numerous peer institutions*

## **Phase 2** *Identify priorities, benefits, and potential risks*

*Discovery with Summit Technologies – MGv Pilot Priority*

## **Phase 3** *Roadmap for processes, platforms, people*

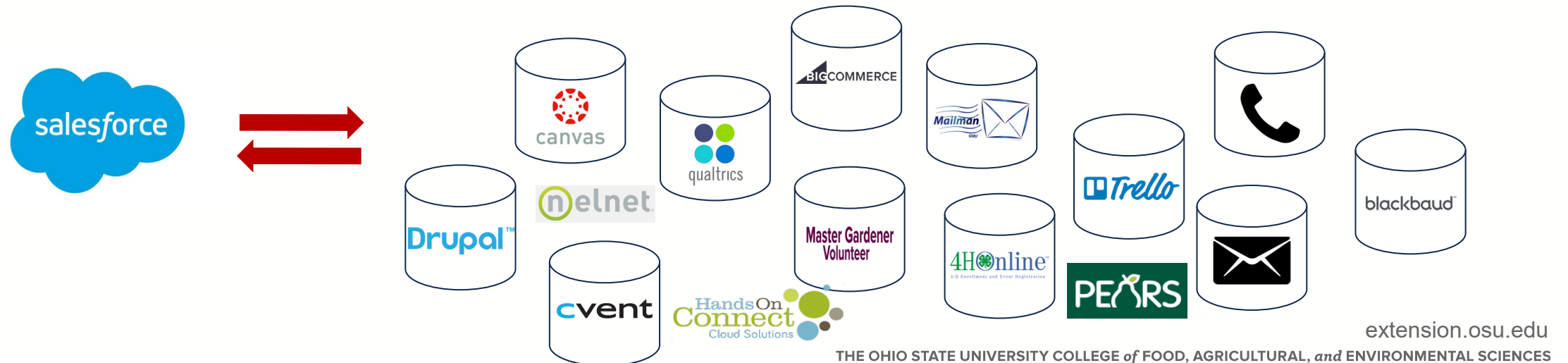
*Leverage existing and new investments*

# PARTNER: SUMMIT TECHNOLOGIES



# DISCOVERY AND ROADMAP

1. Discovery, scoping, and budgeting for the major functional areas of OSU Extension
2. Roadmap for:
  - a. Salesforce platform and supporting apps
  - b. Platform implementation and adoption priorities by functional area
  - c. Integrated approach across functional units



# PILOT UNDERWAY

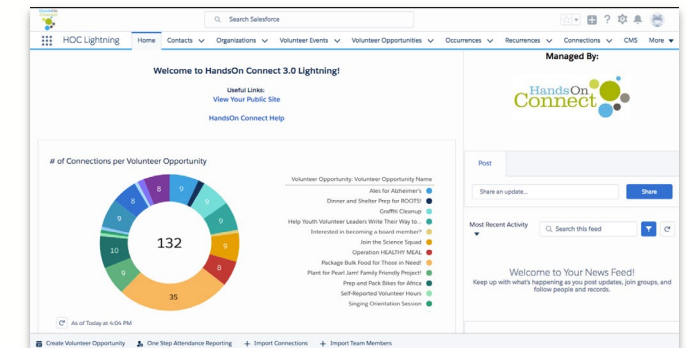
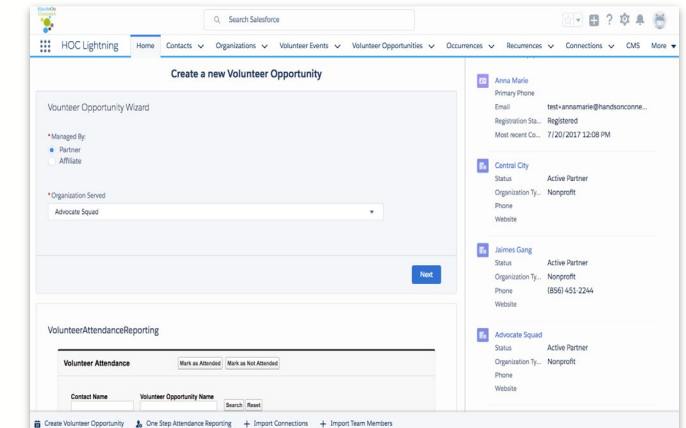


## volunteer management



<https://osu.handsonconnect.org>

- Integrated with Salesforce
- Ready-to-run, customizable website
- Search for projects by date, organization, interest, event, and skill
- Allows for expansion for background checks and mass emailing
- Smartphone and kiosk check-in tools to simplify tracking of volunteer hours
- Reports and graphs to track volunteers, hours served and other metrics
- List email (Salesforce Campaigns)

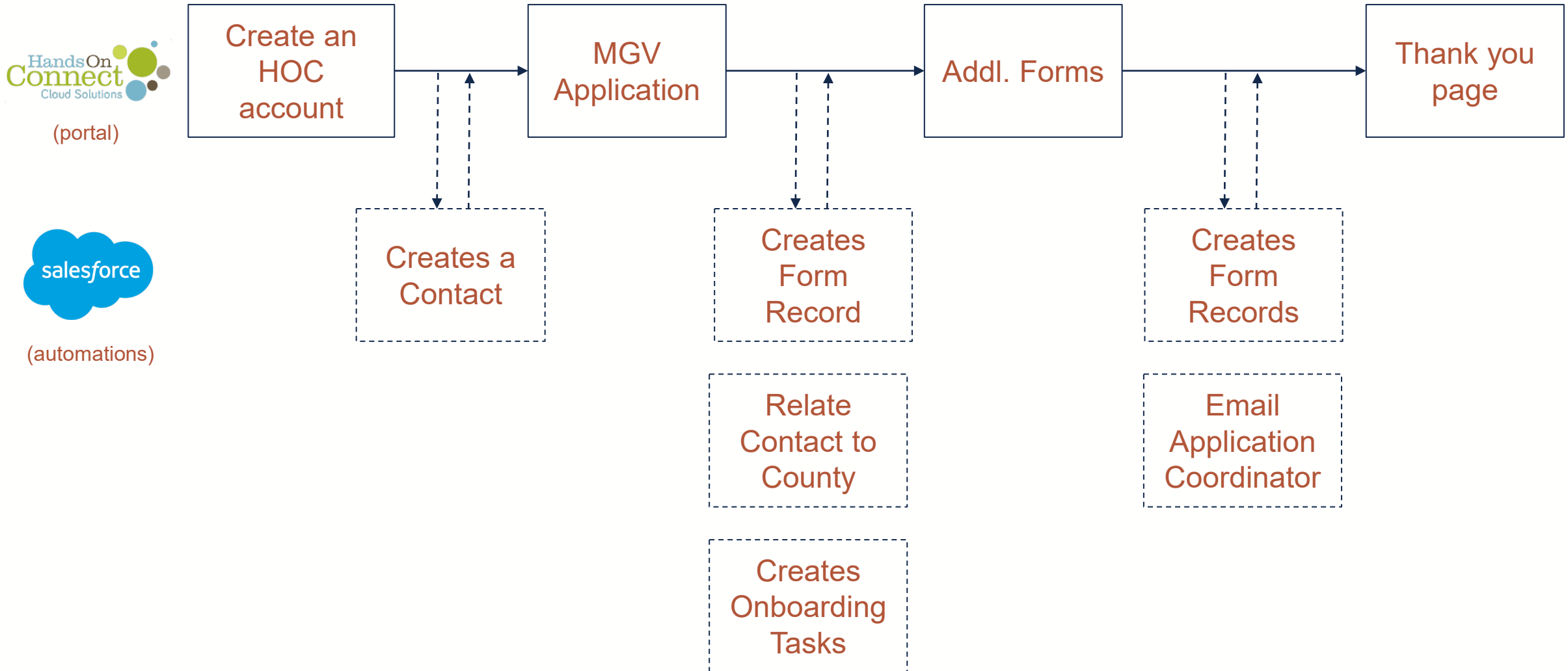


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# POTENTIAL VOLUNTEER – ONBOARDING PROCESS





# VOLUNTEER HOME PAGE

**CFAES** Home Potential Volunteers ▼ Current Volunteers ▼ Forms ▼ OSU MGVS Homepage OSU Extension

## Volunteer Home

### Volunteer Hours

This Year	Last Year	Lifetime
38.5	619	3541.7

### Continuing Education Hours

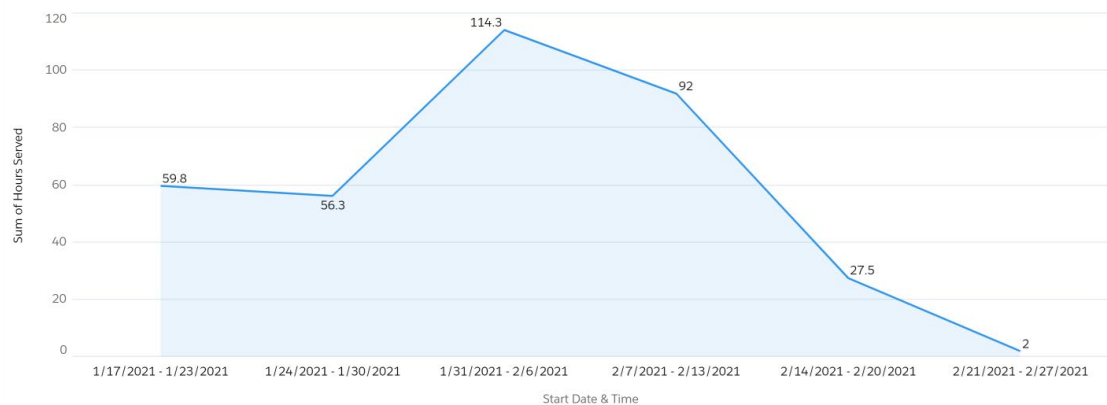
This Year	Last Year	Lifetime
0	179	772.25

View/Edit HoursAdd Hours

<https://osu.handsonconnect.org/volunteer-home>

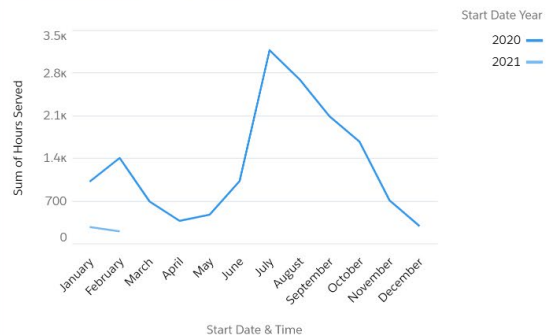
# COUNTY COORDINATOR DASHBOARD

Volunteer Hours - Past 8 Weeks



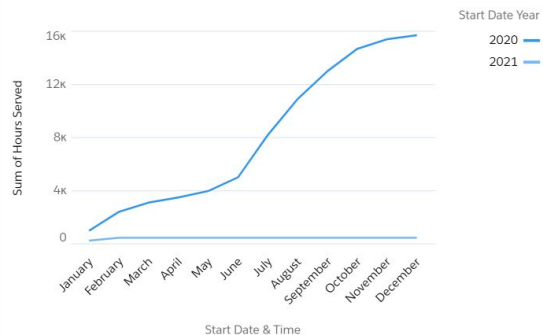
[View Report \(County Volunteer Hours - Past 8 Weeks\)](#)

Volunteer Hours by Year & Month



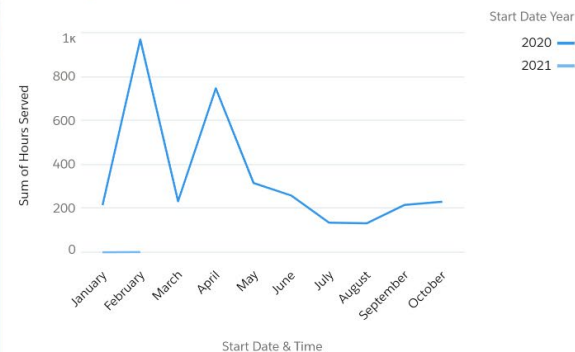
[View Report \(County Volunteer Hours by Year & Month\)](#)

Volunteer Hours by Year & Month - Cumulative



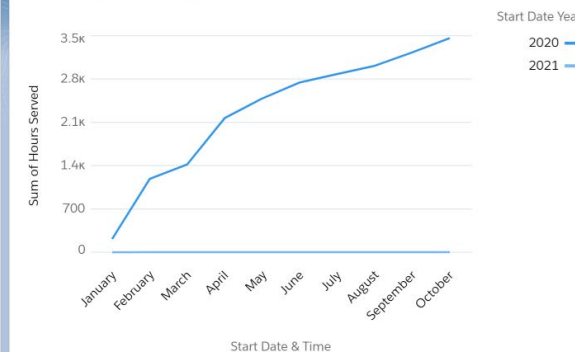
[View Report \(County Volunteer Hours by Year & Month\)](#)

Continuing Ed Hours by Year & Month



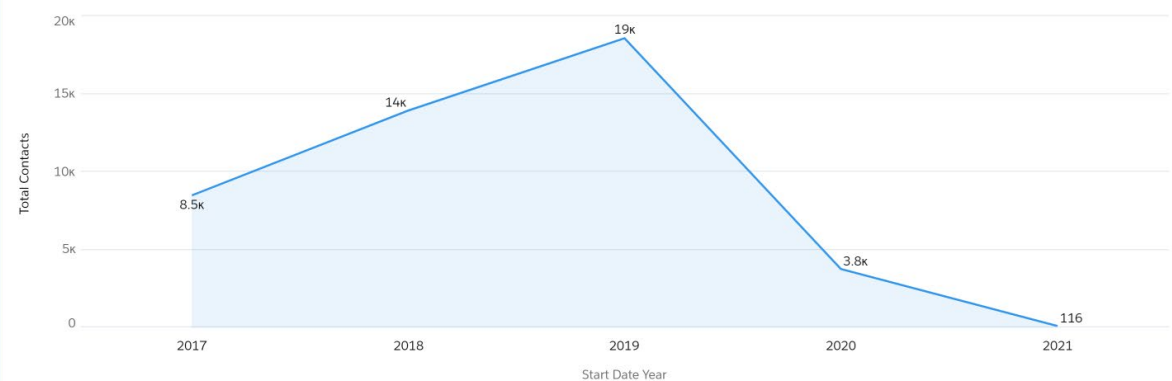
[View Report \(County Cont. Ed Hours by Year & Month\)](#)

Continuing Ed Hours by Year & Month - Cumulative




[View Report \(County Cont. Ed Hours by Year & Month\)](#)

Contacts by Year










[View Report \(Contacts by Year\)](#)


# COUNTY OVERVIEW (VOLUNTEERS, OPPORTUNITIES, REPORTS)



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All



MGV

Home

Contacts

**Organizations**

Volunteer Opportunities

CMS


Reports

Locations


Files

List Emails

Forms

Organization

**Franklin County MGV**



+ Follow

Edit

Hours Report

Contacts Report

Details

Related

Organization Information

Organization Name

Franklin County MGV

Also Known As

Parent Organization

MGV Volunteer Hours

25

MGV Program Year

2020

MGV Continuing Education Hours

10

MGV Volunteer Hours First Year

50

Organization Record Type

Nonprofit

Type

MGV Program

Volunteer Management Status

Active

OSU Extension Area

17

Urban/Rural County

Urban



Federal EIN

Primary Contacts

Primary Volunteer Contact

Opportunity Coordinator

Related Contacts (20+)



Add Relationship

Roster

20+ items • Sorted by MGV Status • Updated a few seconds ago

	<input type="checkbox"/> Contact Name	MGV Status	Roles	Start Year	
1	<input type="checkbox"/> <a href="#">Test Contact</a>				
2	<input type="checkbox"/> <a href="#">Janelle Fling</a>	Active	Volunteer	2013 T	
3	<input type="checkbox"/> <a href="#">Sarah Rice</a>	Active	Volunteer	2006	
4	<input type="checkbox"/> <a href="#">Sandi Rockwell</a>	Active	Volunteer	2001	
5	<input type="checkbox"/> <a href="#">Bobbi Hoersdig</a>	Active	Volunteer	2001	
6	<input type="checkbox"/> <a href="#">Merry Tapp</a>	Active	Volunteer	2001	
7	<input type="checkbox"/> <a href="#">Jackie Mayo</a>	Active	Volunteer	2005	
8	<input type="checkbox"/> <a href="#">Diana Morrison</a>	Active	Volunteer	2009	
9	<input type="checkbox"/> <a href="#">Gail Santner</a>	Active	Volunteer	2014 T	
10	<input type="checkbox"/> <a href="#">Sally Francis</a>	Active	Volunteer	2001	
11	<input type="checkbox"/> <a href="#">Judith Arnett</a>	Active	Volunteer	1999	
12	<input type="checkbox"/> <a href="#">Michael Fibley</a>	Active	Volunteer	1999	
13	<input type="checkbox"/> <a href="#">Shelagh Baker</a>	Active	Volunteer	2010	

# ROADMAP

- Develop a roadmap for platforms, processes, and people:
  - **Platform roadmap:** Maps out the Salesforce ecosystem components and all the supporting technologies (technology stack and architecture)
  - **Process roadmap:** Outlines which sections of the business adopt what solution technology and when (implementation timeline)
  - **People roadmap:** Integrated approach across units connects college personnel with one another, clients, and partners

# PRIORITIES

listen, evaluate,  
consider options

(based on impact, risk,  
complexity, & urgency)

Project List	Budgeted	Impact	Risk	Complexity	Urgency
Project A	✓ Yes	High	Medium	Medium	High
Project B	✓ Yes	High	Low	Medium	Medium
Project C	✗ No	High	Medium	Medium	Low

# PROPOSED TIMELINE



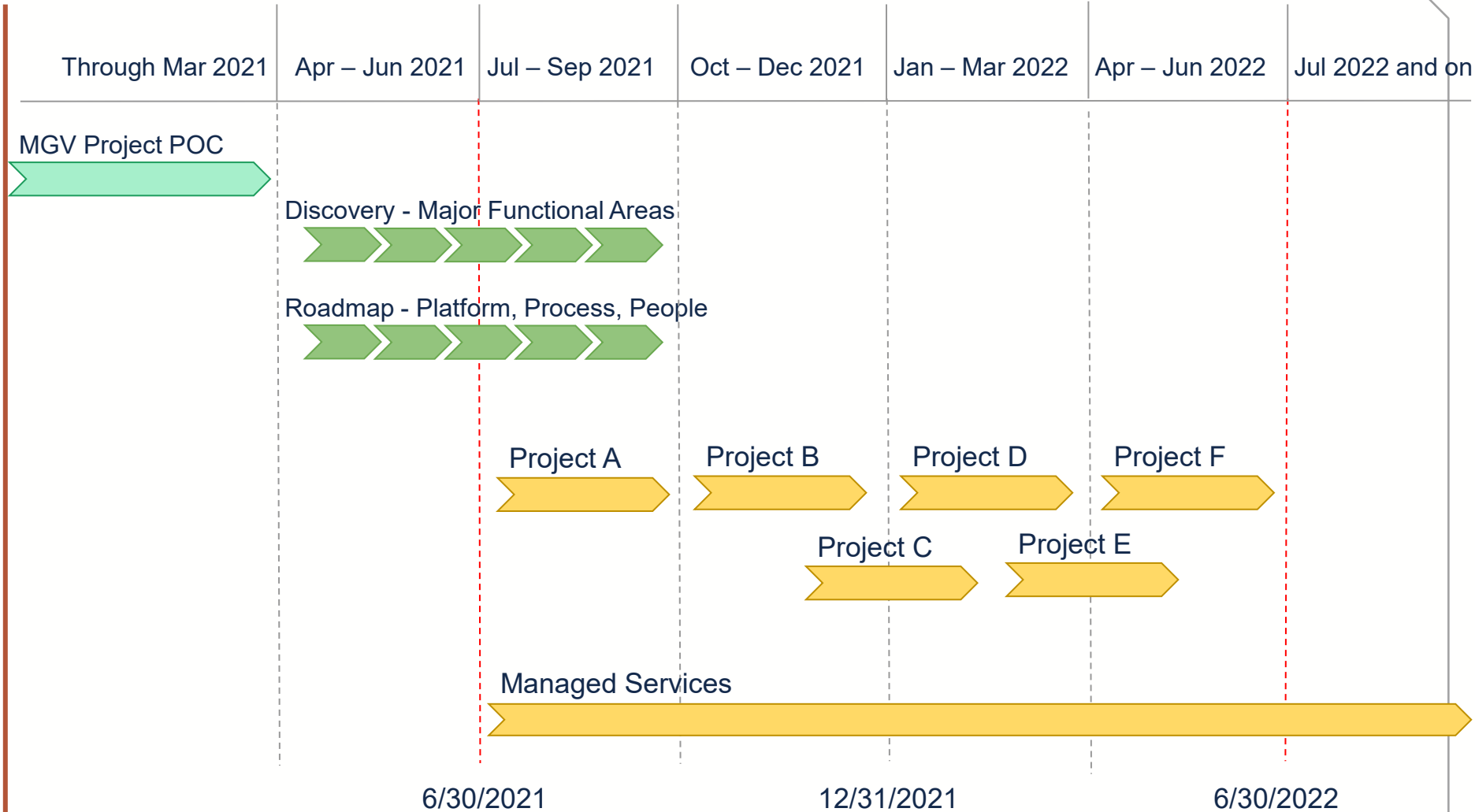
Pilot Project (not in scope for this effort)



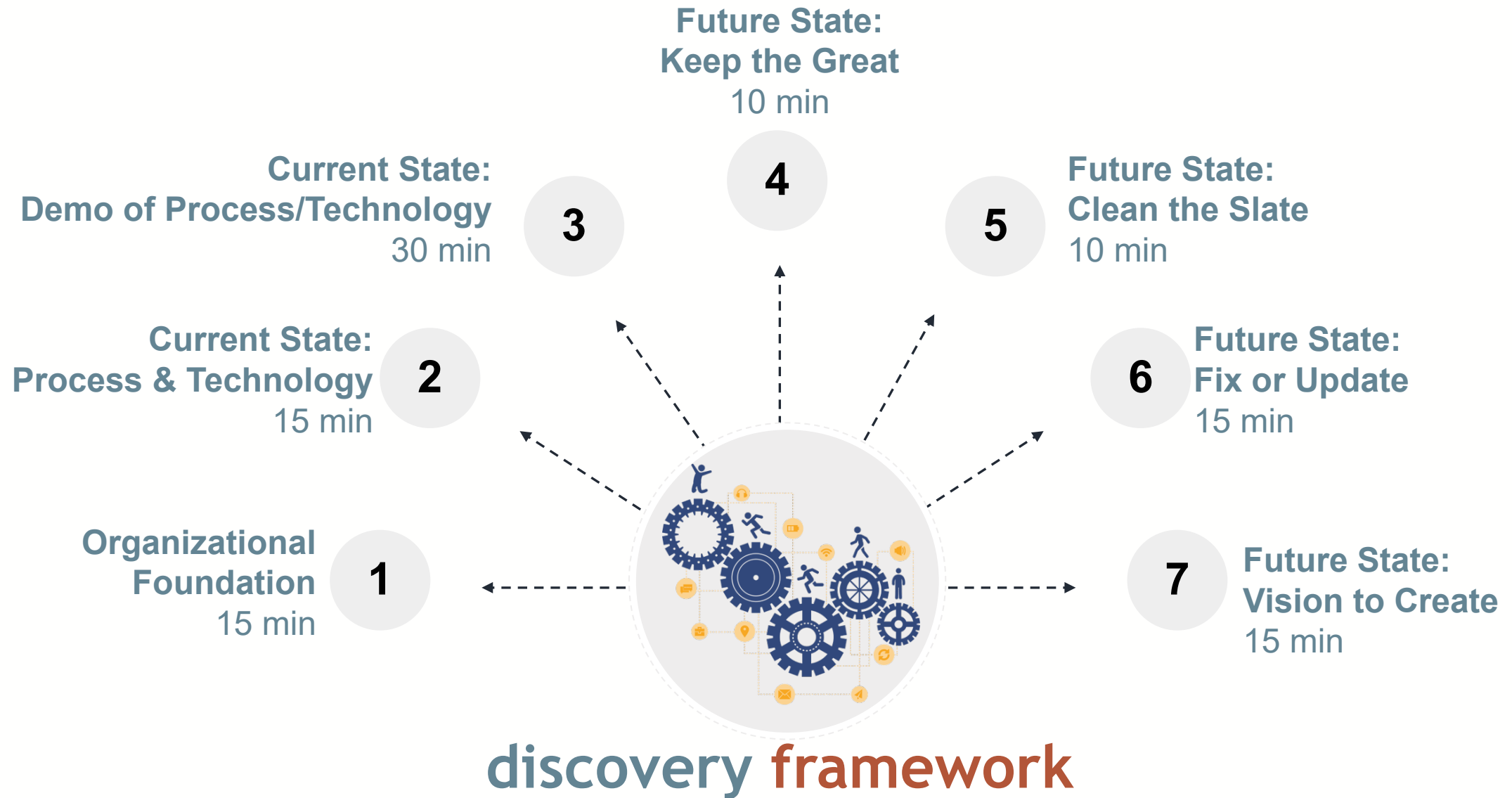
Discovery / Roadmap (scope of this effort)



Next Phases (not in scope for this effort)



# PREPARING FOR DIALOGUE & DISCOVERY





# NEXT ROADMAP INTERVIEWS

- External Relations
- Government Affairs
- Advancement
- Workforce Development
- Reporting
- Data Integration
- E-Learning
- Extension Publications/Products
- Operations
- Events
- Extension Communications
- Knowledge Exchange
- Partnerships
- Master Gardener Volunteers
- IT

# SALESFORCE BENEFIT SUMMARY

- **Creates continuity in the customer journey** (single sign-on)
  - Relevant engagement with community and campus personnel
- **Contributes to Compliance**
  - Race, Ethnicity, Gender (REG data)
- **Provides accessible and actionable data** (visible, transparent)
  - Develop product based on interests
- **Reduces redundant investments** (cybersource accounts)
- **Integrates** with the OSU Enterprise Project

# Ohio State University Extension

## OUR VISION

Ohioans have the *knowledge* and *resources* they need to *actively engage* in creating conditions in which they *thrive*.

## OUR MISSION

We create *opportunities* for people to explore how *science-based knowledge* can *improve social, economic, and environmental conditions*.



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