Customer Relationship Management
Roadmap to Processes, Platforms, People
Spring 2021
WHY A CRM & INTEGRATED REPORTING?

WITH OSU EXTENSION

I need to connect with...

NEWS
EVENTS
PUBLICATIONS
ONLINE LEARNING
CONTACTS

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

THE OHIO STATE UNIVERSITY
JOHN GLENN COLLEGE OF PUBLIC AFFAIRS

THE OHIO STATE UNIVERSITY
COLLEGE OF ARTS AND SCIENCES

THE OHIO STATE UNIVERSITY
COLLEGE OF DENTISTRY

THE OHIO STATE UNIVERSITY
COLLEGE OF FOOD, AGRICULTURAL, AND ENVIRONMENTAL SCIENCES

THE OHIO STATE UNIVERSITY
CORPORATE ENGAGEMENT OFFICE

THE OHIO STATE UNIVERSITY
OFFICE OF THE CHIEF INFORMATION OFFICER

THE OHIO STATE UNIVERSITY COLLEGE OF FOOD, AGRICULTURAL, AND ENVIRONMENTAL SCIENCES
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

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**volunteer management**

- 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)

https://osu.handsonconnect.org
# VOLUNTEER HOME PAGE

## Volunteer Home

### Volunteer Hours

<table>
<thead>
<tr>
<th></th>
<th>This Year</th>
<th>Last Year</th>
<th>Lifetime</th>
</tr>
</thead>
<tbody>
<tr>
<td>This Year</td>
<td>38.5</td>
<td>619</td>
<td>3541.7</td>
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### Continuing Education Hours

<table>
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<tr>
<th></th>
<th>This Year</th>
<th>Last Year</th>
<th>Lifetime</th>
</tr>
</thead>
<tbody>
<tr>
<td>This Year</td>
<td>0</td>
<td>179</td>
<td>772.25</td>
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</table>

[View/Edit Hours] [Add Hours]

[https://osu.handsonconnect.org/volunteer-home](https://osu.handsonconnect.org/volunteer-home)
## COUNTY OVERVIEW (VOLUNTEERS, OPPORTUNITIES, REPORTS)

### Franklin County MGV

#### Details

<table>
<thead>
<tr>
<th>Organization Information</th>
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<tbody>
<tr>
<td>Organization Name</td>
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<tr>
<td>Franklin County MGV</td>
</tr>
<tr>
<td>Also Known As</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Parent Organization</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>MGV Volunteer Hours</td>
</tr>
<tr>
<td>25</td>
</tr>
<tr>
<td>MGV Program Year</td>
</tr>
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<td>2020</td>
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<tr>
<td>MGV Continuing Education Hours</td>
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<td>10</td>
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<tr>
<td>MGV Volunteer Hours First Year</td>
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<tr>
<td>50</td>
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<table>
<thead>
<tr>
<th>Primary Contacts</th>
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<tbody>
<tr>
<td>Primary Volunteer Contact</td>
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<tr>
<td>Opportunity Coordinator</td>
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<table>
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<th>Related Contacts (20+)</th>
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<tbody>
<tr>
<td>Contact Name</td>
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<td>--------------</td>
</tr>
<tr>
<td>Test Contact</td>
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<tr>
<td>Janelle Flieg</td>
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<tr>
<td>Sarah Rice</td>
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<tr>
<td>Sandi Rockwell</td>
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<td>Bobbi Hoensdig</td>
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<tr>
<td>Merry Tapp</td>
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<td>Jackie Mayo</td>
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<tr>
<td>Diana Morrison</td>
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<td>Gail Santner</td>
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<td>Sally Francis</td>
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<tr>
<td>Judith Arnett</td>
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<tr>
<td>Michael Friebly</td>
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<td>Shelagh Baker</td>
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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
<table>
<thead>
<tr>
<th>Project List</th>
<th>Budgeted</th>
<th>Impact</th>
<th>Risk</th>
<th>Complexity</th>
<th>Urgency</th>
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<tr>
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<td>✔ Yes</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
<td>High</td>
</tr>
<tr>
<td>Project B</td>
<td>✔ Yes</td>
<td>High</td>
<td>Low</td>
<td>Medium</td>
<td>Medium</td>
</tr>
<tr>
<td>Project C</td>
<td>✗ No</td>
<td>High</td>
<td>Medium</td>
<td>Medium</td>
<td>Low</td>
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</table>

*listen, evaluate, consider options*

*(based on impact, risk, complexity, & urgency)*
<table>
<thead>
<tr>
<th>Project Name</th>
<th>Phase</th>
<th>Timeline</th>
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</thead>
<tbody>
<tr>
<td><strong>Discovery / Roadmap</strong></td>
<td>(scope of this effort)</td>
<td>Through Mar 2021 - Jul 2022</td>
</tr>
<tr>
<td><strong>Roadmap - Platform, Process, People</strong></td>
<td></td>
<td>Jul – Sep 2021 - Apr 2022</td>
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<tr>
<td><strong>Pilot Project</strong> (not in scope for this effort)</td>
<td></td>
<td>Jan – Mar 2022 - Jul 2022</td>
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<tr>
<td><strong>Next Phases</strong> (not in scope for this effort)</td>
<td></td>
<td>Apr – Jun 2022 - Jul 2022</td>
</tr>
<tr>
<td><strong>Managed Services</strong></td>
<td></td>
<td>Jul 2022 and on</td>
</tr>
</tbody>
</table>

**PROPOSED TIMELINE**

- **Through Mar 2021**: MGV Project POC
- **Apr – Jun 2021**: Discovery - Major Functional Areas
- **Jul – Sep 2021**: Roadmap - Platform, Process, People
- **Oct – Dec 2021**: Project A
- **Jan – Mar 2022**: Project B
- **Apr – Jun 2022**: Project D
- **Jul 2022 and on**: Project F

**PROPOSED TIMELINE**:

- **6/30/2021**: Project C
- **12/31/2021**: Project E
- **6/30/2022**: Project F
PREPARING FOR DIALOGUE & DISCOVERY

1. Organizational Foundation
   - 15 min

2. Current State: Demo of Process/Technology
   - 30 min

3. Current State: Process & Technology
   - 15 min

4. Future State: Keep the Great
   - 10 min

5. Future State: Clean the Slate
   - 10 min

6. Future State: Fix or Update
   - 15 min

7. Future State: Vision to Create
   - 15 min

discovery framework
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.