CFAES

Customer Relationship Management

Roadmap to Processes, Platforms, People

Spring 2021

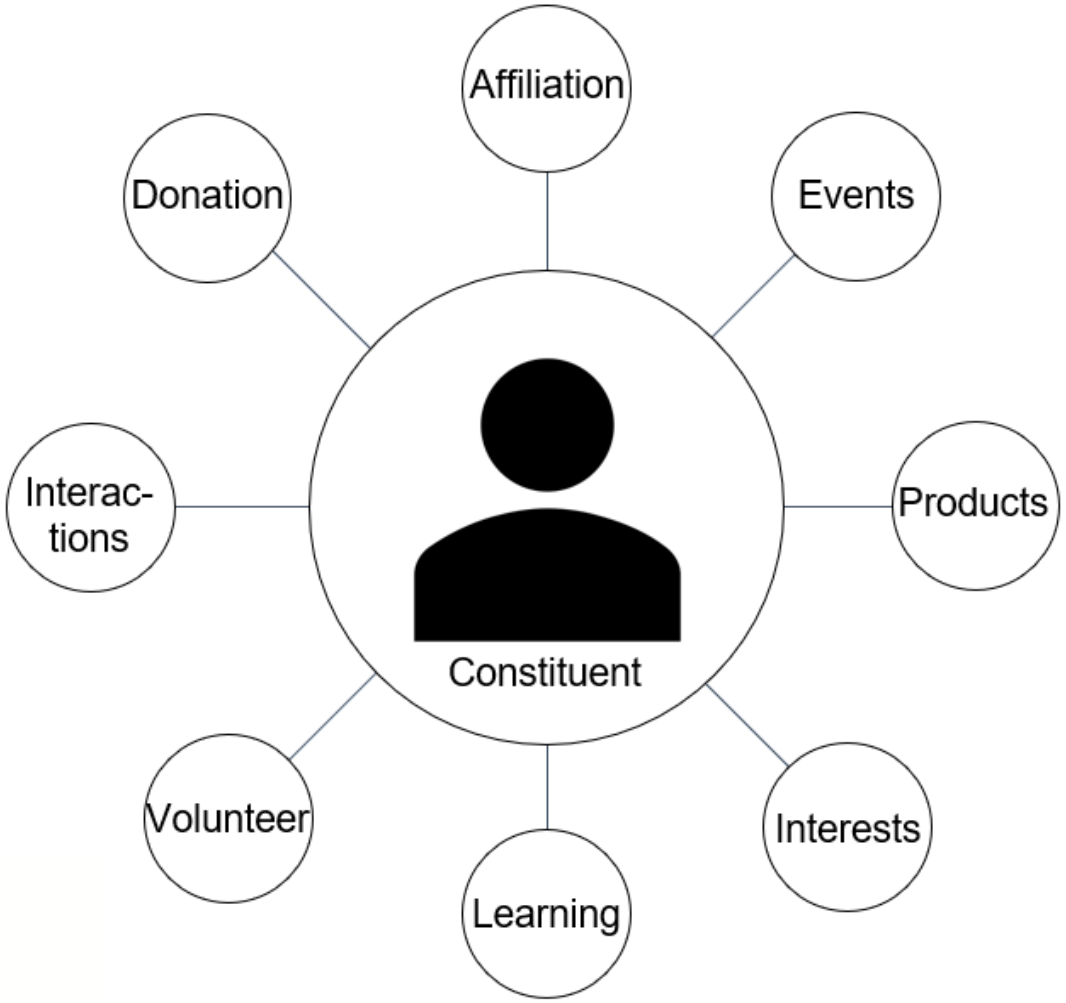
THE OHIO STATE UNIVERSITY
COLLEGE OF FOOD, AGRICULTURAL, AND ENVIRONMENTAL SCIENCES

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

SUMMIT TECHNOLOGIES

SALESFORCE CERTIFIED
salesforce registered consulting partner

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
COLLEGE OF NURSING

THE OHIO STATE UNIVERSITY
OFFICE OF THE CHIEF INFORMATION OFFICER

DISCOVERY AND ROADMAP

1. Discovery, scoping, and budgeting for the major functional areas of OSU Extension

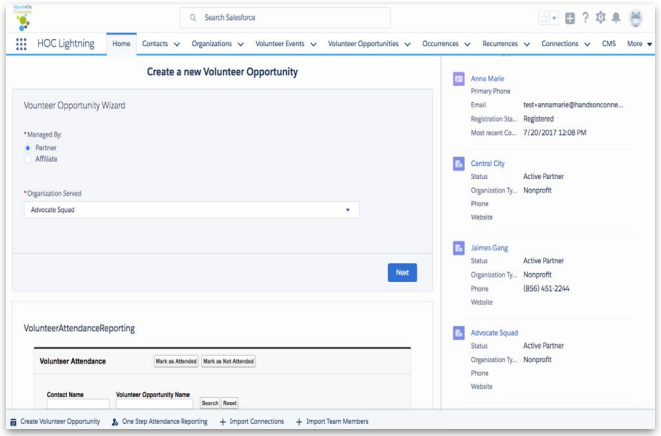
2. Roadmap for:
   a. Salesforce platform and supporting apps
   b. Platform implementation and adoption priorities by functional area
   c. Integrated approach across functional units

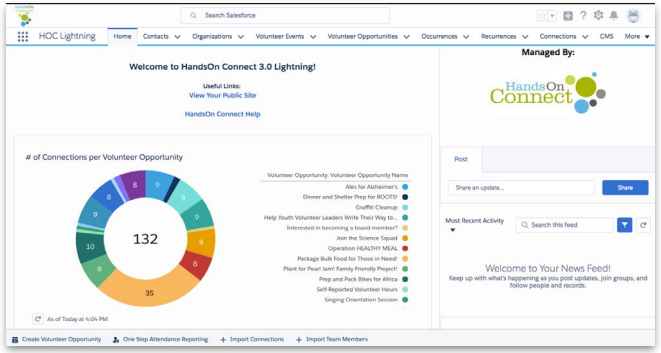
PILOT UNDERWAY

volunteer management

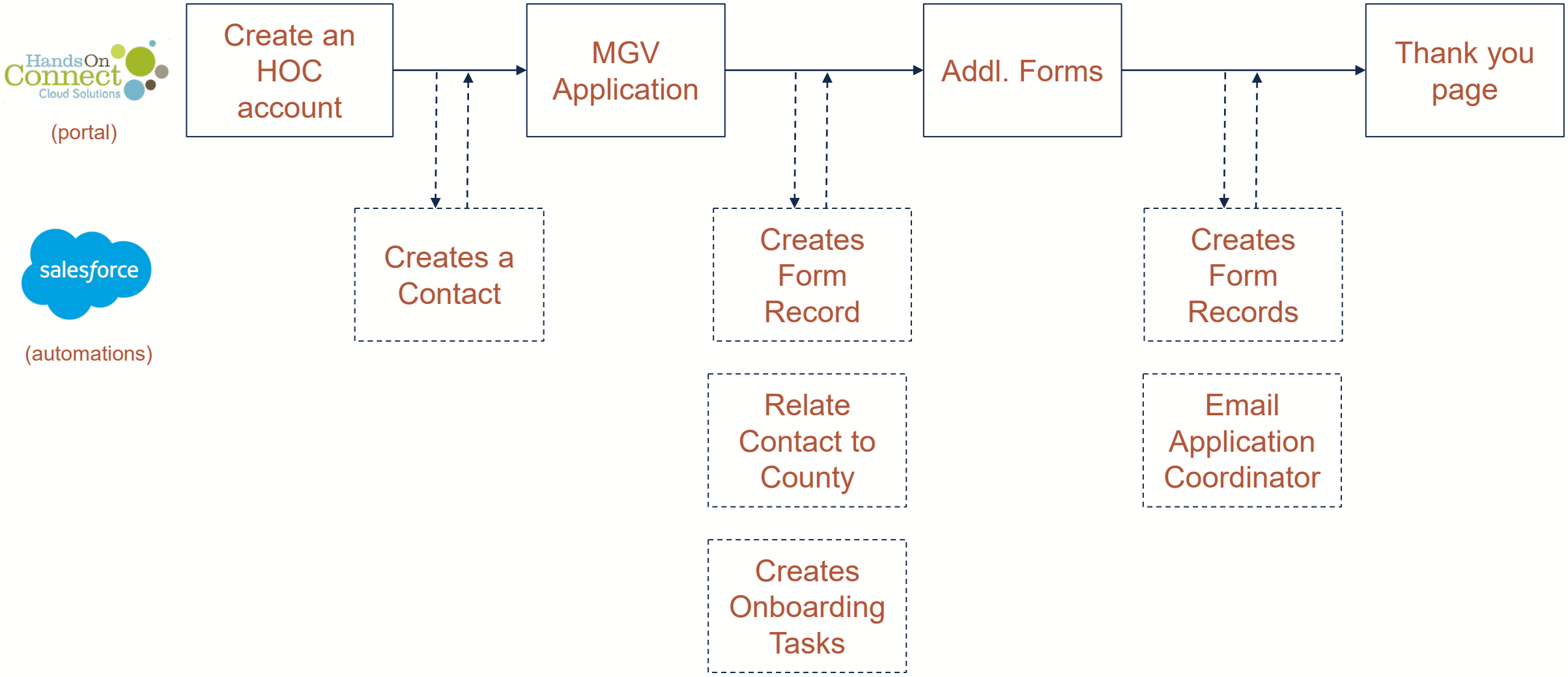
https://osu.handsonconnect.org

- 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)

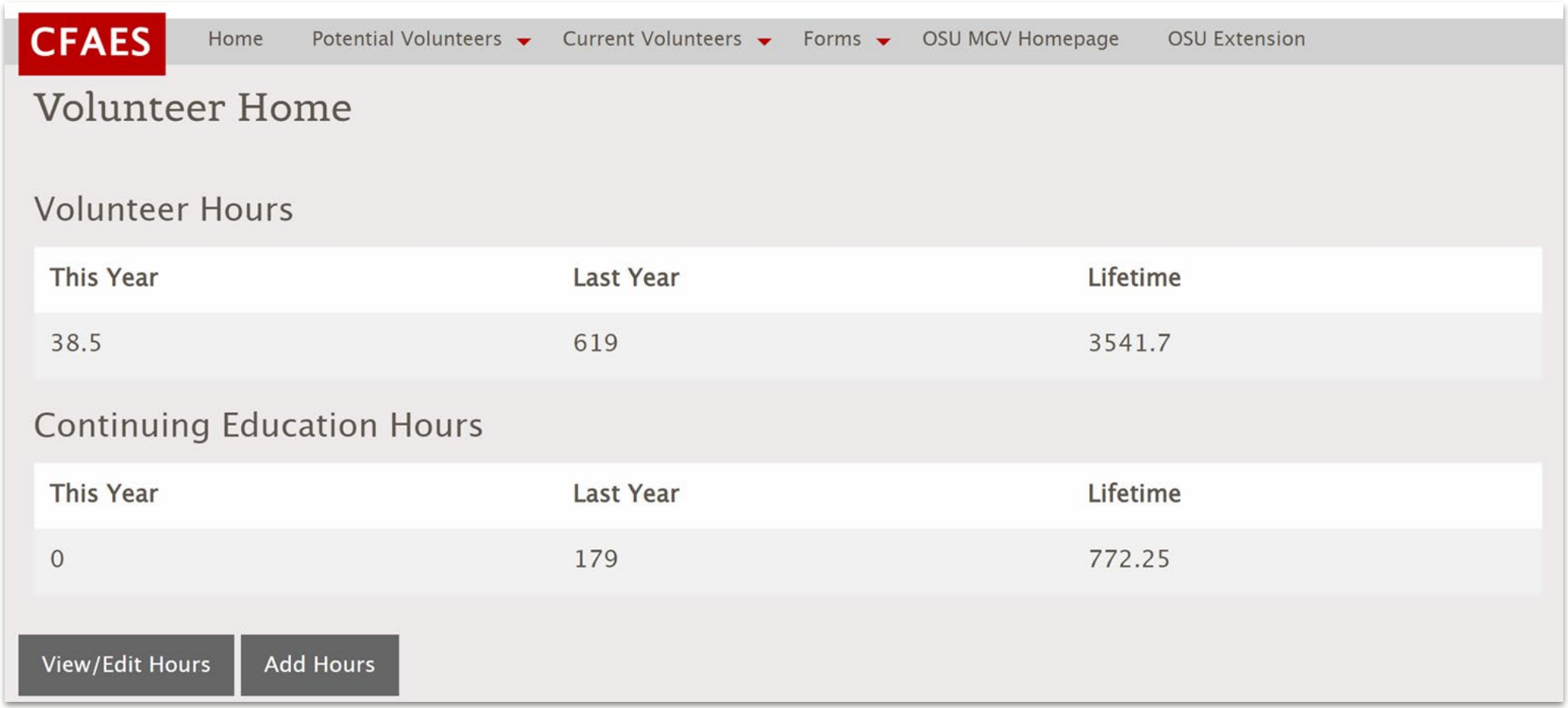




POTENTIAL VOLUNTEER – ONBOARDING PROCESS

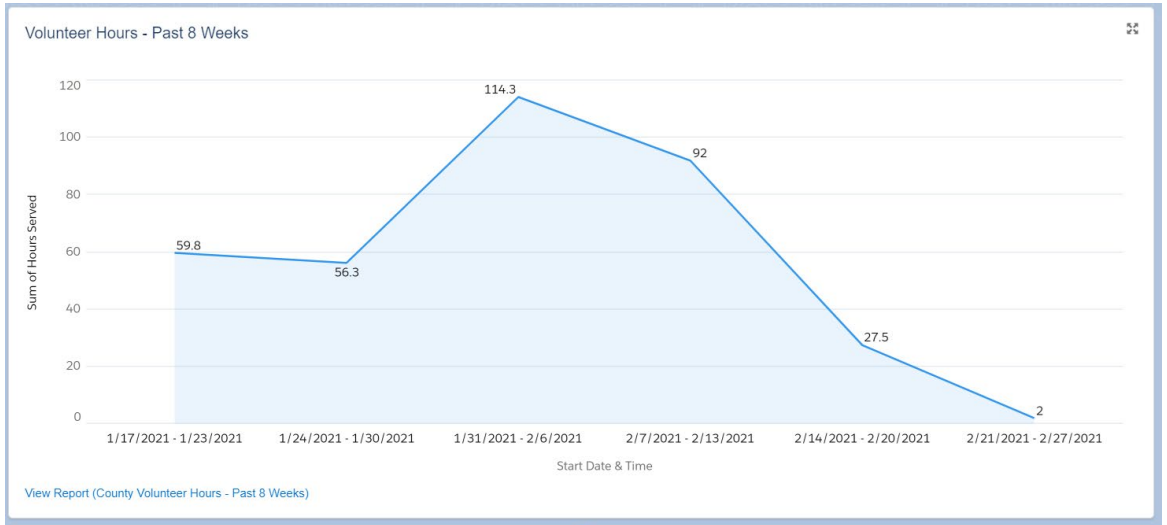


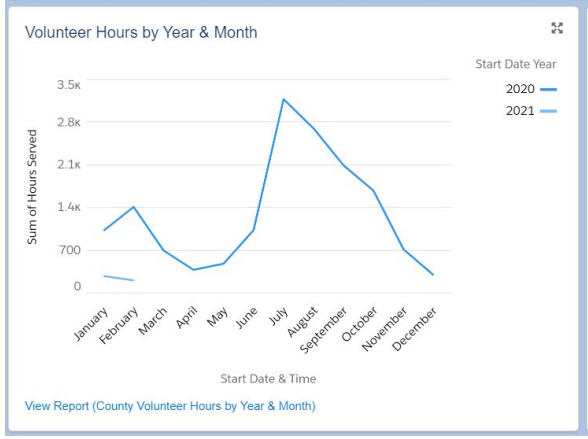
VOLUNTEER HOME PAGE

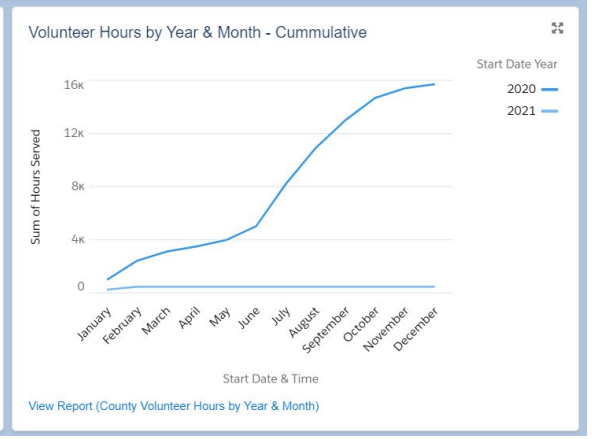


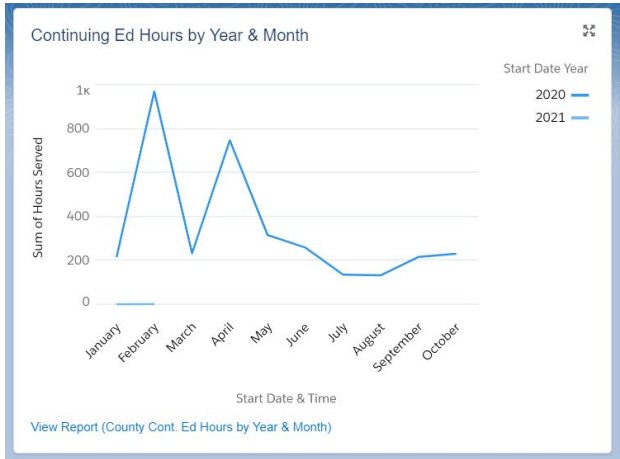
https://osu.handsonconnect.org/volunteer-home

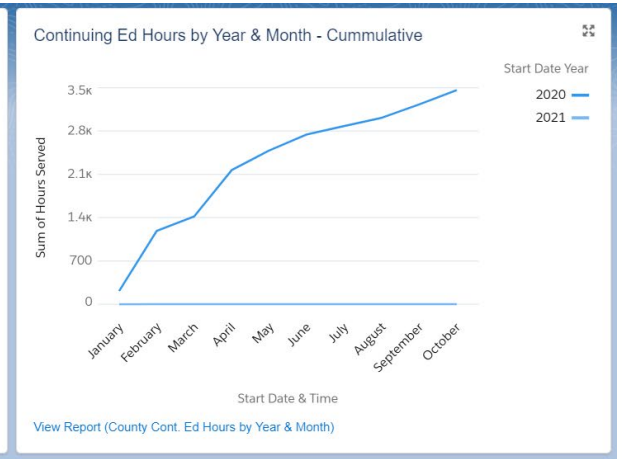
COUNTY COORDINATOR DASHBOARD

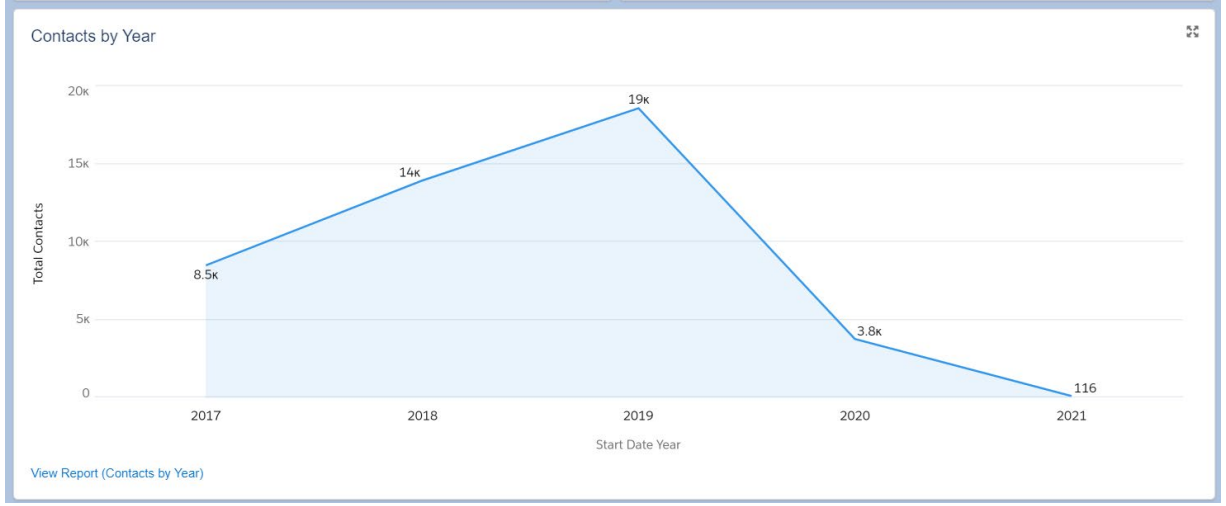




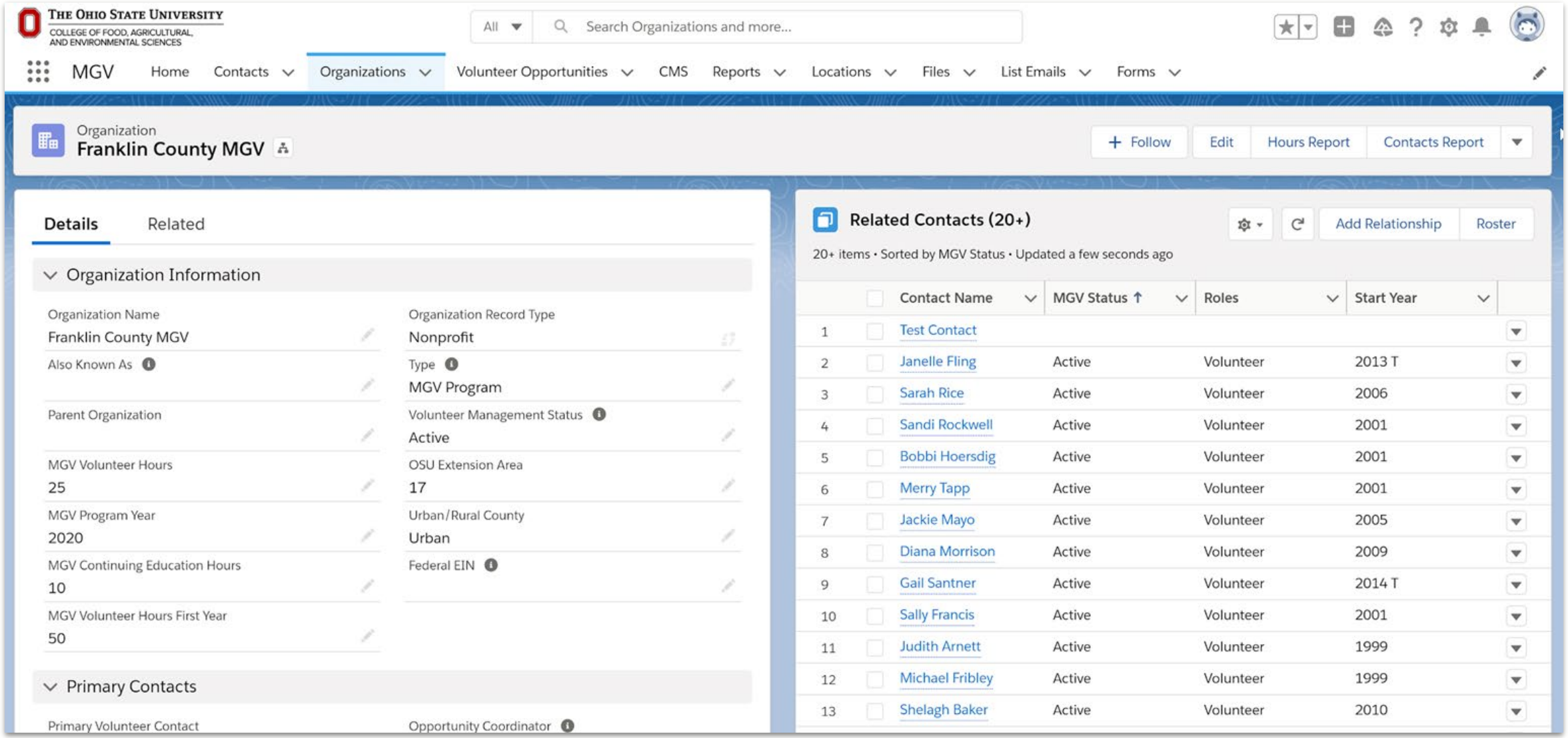








COUNTY OVERVIEW (VOLUNTEERS, OPPORTUNITIES, REPORTS)



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)

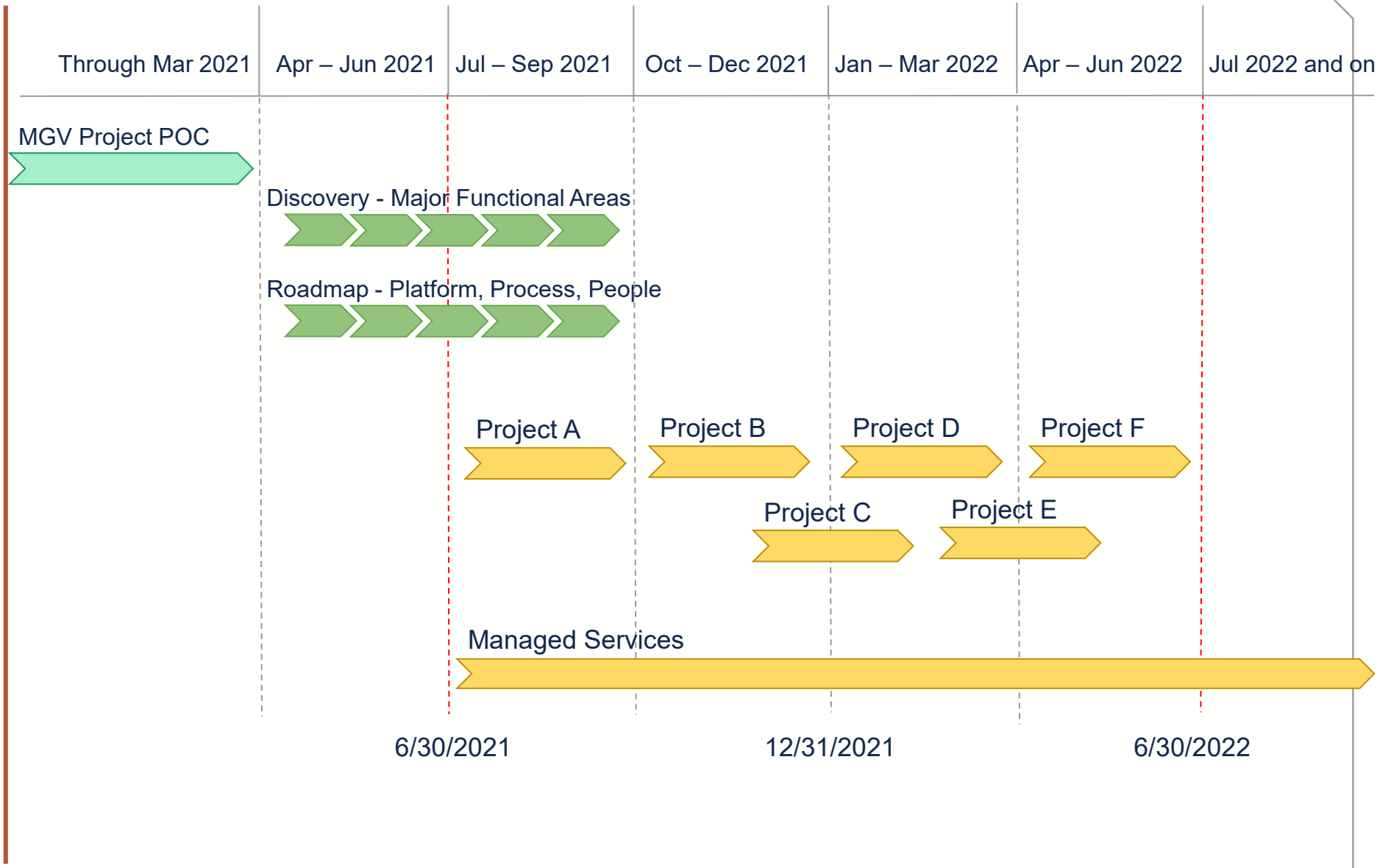
Project List	Budgeted	Impact	Risk	Complexity	Urgency
Project A	✓Yes	High	Medium	Medium	High
Project B	✓Yes	High	Low	Medium	Medium
Project C	x No	High	Medium	Medium	Low

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

Future State:
Keep the Great
10 min

4

Current State:
Demo of Process/Technology
30 min

3

5

Future State:
Clean the Slate
10 min

Current State:
Process & Technology
15 min

2

6

Future State:
Fix or Update
15 min

Organizational
Foundation
15 min

1

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

CFAES

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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