

EMPLOYER OUTREACH CRM

Transition Plan

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May 19, 2026

A New CRM is Arriving!



A screenshot of the OneCommute dashboard. The top navigation bar includes "Commuter Connections O...", "Home", "Accounts", "Contacts", "Commuter Profiles", "Program Overviews", "Large Event Management", "Product Offerings", "Program Services", and "More". The main content area is titled "Dashboard TDM Metrics" and includes a search bar, "Open", "Refresh", and "Subscribe" buttons, and a "Last refreshed 20 days ago" warning. The dashboard is divided into several sections: "Today's Events" with a "View Calendar" button, "Today's Tasks" with a "View All" button, and several data cards. The data cards include: "# of Commuters Requesting Assistance" (0), "Number of Employers M..." (4), "# of Commuter Profiles b..." (5), "Number of V..." (0), "Commuter Surveys Com..." (0), "SOV Reduction" (0), and "Vehicle Miles Reduced" (0). Each card has a "View Report" link and a timestamp of "As of Apr 28, 2026, 10:12 AM".



Accounts, Events, Programs, Surveys, Reports

OneCommuter Reports and... Home Reports Dashboards Survey Analytics

Dashboard
Centralized Operations Scorecard
 Centralized Operations Scorecard
 As of May 18, 2026, 7:27 PM Viewing as OneCommuter Support

Number of Employers by Jurisdiction

Employer with Employee Benefits

Territory	Account Name	Transit Pre...	Tele...	E...	Car...	Van...	Sho...	Bike Racks or Secu...
Commuter C	Booz Allen Hamilton (Demo)	<input type="checkbox"/>	Unknov	<input type="checkbox"/>	Unkno	Unkno	Unknov	Unknown
Commuter C	Booz Allen Hamilton (Demo)	<input type="checkbox"/>	Unknov	<input type="checkbox"/>	Unkno	Unkno	Yes	Yes

Employer Activity Last 30 Days

New Program Services: Corp Challenge Rideshare

Information

Program Plan Actual ID

*Account

Date

Frequency

Notes

*Product Offering ID

Corporate Challenge Notes

Number of Participants

Record Type
 Corp Challenge Rideshare
 Active

Cancel

New Large Event Management

Select a record type

Incentive Management
 Incentive Management

Event Management
 Standard Event Management and Can Create Commuter Profiles

Cancel Next

OneCommuter Request Tra... Home Request Tracker Reports Dashboards

Dashboards
Recent
 3 items

Search recent dashboards...

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	TDM Metrics		3.2 Outreach Dashboard	OneCommuter Support	4/25/2026, 9:51 PM	
Created by Me	Commuter Returns	Summary for All Accounts for Commuter Programs	3.2 Outreach Dashboard	OneCommuter Support	4/25/2026, 9:51 PM	
Private Dashboards	Centralized Operations Scorecard	Centralized Operations Scorecard	3.2 Outreach Dashboard	OneCommuter Support	4/25/2026, 9:51 PM	
All Dashboards						



Knowledge Hub

The screenshot displays the Knowledge Hub interface. At the top, there is a navigation bar with the CC logo, links for Home, Learning Paths, Support / Request Tracker, and More. A search bar and notification icons are also present. The main content area features a grid of nine course cards, each with a title, description, icon, and metadata (Points, Minutes, Level).

Course Title	Icon	Points	Minutes	Level
OneCommute & Salesforce	CC Logo	360	30	Beginner
OneCommute Outreach Management Basics	Bus	1080	90	Moderate
Outreach Advanced	Sunburst	1440	120	Advanced
Import Surveys	Monitor	540	45	Advanced
Development Ordinance - Tracking of Commitment Basic	Clipboard	1080	90	Moderate
Reports & Dashboards	Report	1440	120	Advanced
Ride Home Organizations	Person	1200	100	Advanced
Large Event - Planning and Management	Event	1080	90	Moderate

OneCommute Implementation Timeline

Project Timeline OneCommute Enterprise Commuter Management Application			Week Beginning															
			4/27/2026	5/4/2026	5/11/2026	5/18/2026	5/25/2026	6/1/2026	6/8/2026	6/15/2026	6/22/2026	6/29/2026	7/6/2026	7/13/2026	7/20/2026	7/27/2026	8/3/2026	8/10/2026
Phase	Description	Duration	0	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14
Pre-Kickoff	Finalize Project Documentation	2 weeks	✓	✓														
Phase 1a	Project Kickoff	1 week			✓													
Phase 1b	OneCommute CRM Configuration <i>Roles & permissions, event management, program management, marketing</i>	4 weeks			✓	★												
Phase 1c	Data Review, Import, and Full Team Introduction <i>Field mapping, data import, local admin trainings, data testing & validation, reports & dashboards</i>	11 weeks												6/25		7/9		
Phase 1d	Survey Management	3 weeks																
Phase 1e	Manage Services and Support <i>Local admin training: Q&A, reports, surveys</i>	3 weeks															7/30	



Full Team Trainings - To Be Scheduled
Team Meetings and Check-ins - As Needed



We Are Here

What You Need to Know

- **Final date to update Act! records: Friday, May 29**
 - **June 1 until OneCommute launches:** please track account updates independently
- Any record that hasn't been updated or verified since **June 30, 2023** will be archived
- **Local admin 1-hour virtual trainings (look for invitations soon!)**
 - June 25: OneCommute orientation
 - July 9: Review data in live system, accounts, contacts, and activity management
 - July 30: Reports, dashboards, and surveys
 - July 13 – July 31: check-ins as needed

Help Us Help You

- What do you wish was currently available? What would you hate to lose?
 - Fields
 - Choices for existing fields

The screenshot displays the 'act!' CRM interface for a contact named S. Khan. The interface is divided into several sections:

- Navigation:** A blue sidebar on the left contains menu items: Welcome, Contacts, Groups, Companies, Calendar, Task List, History List, and Opportunities. Below this is a 'Contact Field:' dropdown set to 'D/Status' and a 'contains:' field.
- Top Bar:** Includes 'Edit', 'Lookup', 'Contacts', 'Schedule', 'Write', 'Reports', 'Tools', 'Custom Tables', a search icon, and the user name 'Stacy King'.
- Contact Header:** Shows 'S. Khan' with navigation arrows and '27 of 13121' contacts. Action buttons include 'E-mail', 'History', 'Note', 'To-Do', 'Meeting', 'Call', and a 'New' dropdown.
- Detail View:** The main area contains various fields:
 - Company:** &pizza
 - Contact:** S. Khan
 - Phone:** (240) 621-7016
 - Level:** Level 3
 - Emp Total:** 15
 - Address:** 11626 Old Georgetown Road, Pike & Rose, Block 12, North Bethesda, Maryland 20852
 - City:** North Bethesda
 - State:** Maryland
 - Create Date:** 9/4/15
 - ID/Status:** KEEP - NB
 - Jurisdiction* Required Field:** Montgomery-NB
 - Current Programs:** Display;Distributes/Posts Info;ETC; EV; transit subsidy
 - Transit Benefit Type:** Other Subsidy-Fare Share
 - Telework Program:** (empty)
 - Parking Type:** (empty)
 - Transit Benefit Amount:** \$50.00
 - Telework Start Date:** (empty)
 - Company Vanpools:** (empty)
 - After 07/1999:** (empty)
 - Before 07/1999:** (empty)
 - after 6/2002:** (empty)
 - after 6/2005:** (empty)
 - After 6/2009:** (empty)
 - Other Fields:** Ck Date, Contender, Last Field Change Hist (6/5/25), Last PLC3 Change (4/18/19), Last PLC4 Change, Last Part Lvl Change (4/18/19).
- Bottom Bar:** A horizontal menu with options: History, Notes, Documents, Groups/Companies, Contact Info, Benefits offered, Additional Benefits, History of Programs, Survey Data, and Secondary Contacts.

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