

# EMPLOYER OUTREACH CRM CLEANUP

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## Tips and Recommend Processes

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Stacey King  
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Employer Outreach Committee  
January 20, 2026

# Employer Outreach CRM Records Cleanup

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- Comprehensive records cleanup in Act! database needs completed by April 30, 2026.
- All employer records in the Act! CRM must be relevant for:
  1. Program Evaluation
  2. Database Migration
- Any record that hasn't been updated or verified since June 30, 2023 will be archived.
- Only active records migrate to the new CRM, expected in late spring / early summer.

# Data Cleanup Process

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- Expect a listing of records pending archival week of 1/26.
- Update or verify records in Act! accordingly.
  - Could serve as a good opportunity to re-establish stagnant relationships with employers.
- Administrators must trigger one of several fields and save the change in the database.
  - Eligible fields highlighted in the next several slides.

Edit

Lookup

Contacts

Schedule

Write

Reports

Tools

Custom Tables

act!

Welcome

Contacts

Groups

Companies

Calendar

Task List

History List

Opportunities

Act! Insight

<<

<

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Company

Contact

Salutation

Title

Department

Phone

Fax

Level

Current Programs

Employee Total

Empl- Total

Address

City

State

ZIP Code

Web Site

E-mail

ID/Status

Jurisdiction\*

Required Field Representative

Rep- Phone

E-mail

History

Note

To-Do

Meeting

Detail View

List View

Conformity Status

Remove Delete Record

Archived Employer

COMMUTER CONNECTIONS®

A SMARTER WAY TO WORK

Notice of acceptable use of MWCOC property. The Regional ACT! Employer Database is MWCOC property. This application may only be used by authorized uses in accordance with the MWCOC IT acceptable use policy, the COG Board Rules of Procedure, and the Commuter Connections Lead Response Process\*. Use of this application may be monitored at any time. By continuing, you indicate your awareness of the abovementioned policies and consent to their terms and conditions.

# Eligible Fields: Benefits Offered

Contact Info

Benefits offered

Additional Benefits

History of Programs

Survey Data

Secondary Contacts

Web Info

Activities

Relationships

Opportunities

Campaign Results

<div>Transit Benefit Type</div> <div>Pre-Tax Smart Benefits</div>	<div>Telework Program</div> <div></div>	<div>Parking Type</div> <div></div>	<div>Info Display Installed</div> <div></div>
<div>Transit Benefit Amount</div> <div></div>	<div>Telework Start Date</div> <div></div>	<div>Company Vanpools</div> <div></div>	
<div>Transit Benefit Start Date</div> <div></div>	<div>Tele- Participants</div> <div></div>	<div>Started Vanpools</div> <div></div>	
<div>Benefit Participants</div> <div></div>	<div>Car Vanpool Spaces</div> <div></div>	<div>Shuttle Start Date</div> <div></div>	

# Eligible Fields: Additional Benefits

Contact Info

Benefits offered

Additional Benefits

History of Programs

Survey Data

Secondary Contacts

Web Info

Activities

Relationships

Capital Bike Share Corporate Partner	Transit Screen Installation Date	Car Charging Station
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Capital BikeShare Station Installed	Compressed Work Week Type	Type of Charging Station
<input type="text"/>	<input type="text"/>	<input type="text"/>
Bicycle Benefit	compressed work week participants	# of Charging Stations
<input type="text"/>	<input type="text"/>	<input type="text"/>
Bicycle Benefit Participants		
<input type="text"/>		

# Eligible Fields: History of Programs

ntact Info   Benefits offered   Additional Benefits   **History of Programs**   Survey Data   Secondary Contacts   Web Info   Activities   Relationships   Opportunities   Campaign Results

TDM Strategies

After 07/1999	<input type="text"/>	After 06/2011	<input type="text"/>
Before 07/1999	<input type="text"/>	After 06/2014	<input type="text"/>
after 6/2002	<input type="text"/>	After 06/2017	<input type="text"/>
after 6/2005	<input type="text"/>	After 06/2020	<input type="text"/>
After 6/2008	<input type="text"/>	After 06/2023	<input type="text"/>

# Eligible Fields: Survey Data

ntact Info   Benefits offered   Additional Benefits   History of Programs   **Survey Data**   Secondary Contacts   Web

	<u>1st Survey</u>	<u>2nd Survey</u>	<u>3rd Survey</u>
Date	<input type="text"/>	<input type="text"/>	<input type="text"/>
AVO	<input type="text"/>	<input type="text"/>	<input type="text"/>
Bicycle	<input type="text"/>	<input type="text"/>	<input type="text"/>
Carpool	<input type="text"/>	<input type="text"/>	<input type="text"/>
SOV	<input type="text"/>	<input type="text"/>	<input type="text"/>
Transit	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vanpool	<input type="text"/>	<input type="text"/>	<input type="text"/>
Walk	<input type="text"/>	<input type="text"/>	<input type="text"/>



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