

EMPLOYER OUTREACH CRM CLEANUP

Tips and Recommend Processes

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Employer Outreach Committee
January 20, 2026

Employer Outreach CRM Records Cleanup

- 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

- 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.

Eligible Fields: Contacts

act! CRM Software Interface showing the 'Contacts' screen for Stacy King.

Header: Edit, Lookup, Contacts, Schedule, Write, Reports, Tools, Custom Tables, Search.

Left Sidebar: Welcome, Contacts, Groups, Companies, Calendar, Task List, History List, Opportunities, Act! Insight.

Top Right: E-mail, History, Note, To-Do, Meeting.

View Options: Detail View, List View, Print, Copy, Paste.

Stacy King Contact Record:

- Company: [redacted]
- Contact: Stacy King
- Salutation: King
- Title: [redacted]
- Department: [redacted]
- Phone: [redacted] Ext: [redacted]
- Fax: [redacted]
- Level: [redacted]
- Current Programs:
 - Employee Total: [redacted]
 - Empl- Total: [redacted]
- Address: [redacted]
- City: [redacted]
- State: [redacted]
- ZIP Code: [redacted]
- E-mail: [redacted]
- ID/Status: [redacted]
- Jurisdiction*: Montgomery-GSG/R
- Required Field: [redacted]
- Representative: [redacted]
- Web Site: [redacted]
- Rep- Phone: [redacted]

Conformity Status: [redacted]

Remove Delete Record: [redacted]

Archived Employer: [redacted]

Commuter Connections Logo: **COMMUTER CONNECTIONS.** A SMARTER WAY TO WORK

Notice of acceptable use of MWCOG property. The Regional ACT! Employer Database is MWCOG property. This application may only be used by authorized users in accordance with the MWCOG 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 Result
	Transit Benefit Type		Telework Program		Parking Type			Info Display Installed		
	Pre-Tax Smart Benefits		Telework Start Date		Company Vanpools					
	Transit Benefit Amount		Tele- Participants		Started Vanpools					
			Car Vanpool Spaces		Shuttle Start Date					
	Transit Benefit Start Date									
	Benefit Participants									

Eligible Fields: Additional Benefits

Contact Info	Benefits offered	Additional Benefits	History of Programs	Survey Data	Secondary Contacts	Web Info	Activities	Relationship
Capital Bike Share Corporate Partner			Transit Screen Installation Date			Car Charging Station		
Capital BikeShare Station Installed			Compressed Work Week Type			Type of Charging Station		
Bicycle Benefit			compressed work week participants			# of Charging Stations		
Bicycle Benefit Participants								

Eligible Fields: History of Programs

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

TDM Strategies

After 07/1999

After 06/2011

Before 07/1999

After 06/2014

after 6/2002

After 06/2017

after 6/2005

After 06/2020

After 6/2008

After 06/2023

Eligible Fields: Survey Data

	Contact 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"/>		<input type="text"/>
AVO	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>
Bicycle	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>
Carpool	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>
SOV	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>
Transit	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>
Vanpool	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>
Walk	<input type="text"/>		<input type="text"/>		<input type="text"/>		<input type="text"/>

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