EMPLOYER OUTREACH CRM

Feedback on Needed Functionalities for a Client Relationship Management (CRM) Database

Dan Sheehan
Transportation Operations Programs Director

Commuter Connections Employer Outreach Committee
July 15, 2025

COMMUTER CONNECTIONS® | A SMARTER WAY TO WORK

Known Requirements

- Manage sales contacts and outreach efforts

- Examine evolution of TDM programs, policies, and strategies offered by employers

- Filters to view/analyze employers within specific geography

- Communications management tool(s) and/or export options

  - E.g., MailChimp integration; email address exports

- Custom reports builder

Recent Suggestions

- Reports builder that can be used to target specific companies

- Flexibility for local jurisdictions to customize fields within their dashboard/UI

- Permit the database to communicate with commuter accounts in the Commuter Connections TDM System

    - Could link commuters to employer records for analysis and outreach opportunities

- Ensure database is always open and accessible

- Forced data integrity policies

    - i.e., archive incomplete or inactive records

- Dashboard summary of program/database statistics

Feedback: Needs Assessment
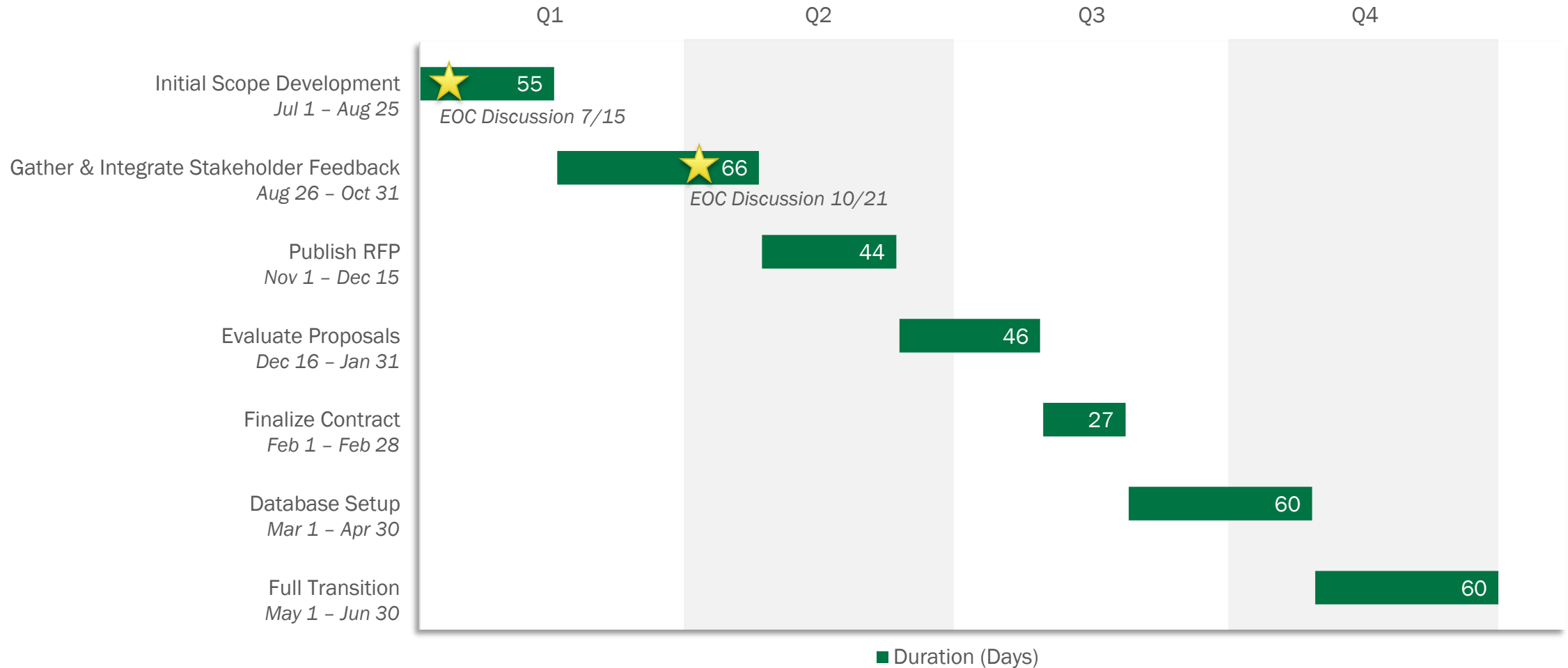
How can a CRM help you accomplish your TDM goals?

COMMUTER CONNECTIONS. | A SMARTER WAY TO WORK

Feedback: Functionality

What specific tasks would you like to accomplish using the CRM?

COMMUTER CONNECTIONS® | A SMARTER WAY TO WORK

Feedback: Data

What type of data would you like to see included in the database?

How do you prefer to pull data from a CRM?

COMMUTER CONNECTIONS® | A SMARTER WAY TO WORK

Employer Outreach CRM RFP Tentative Timeline
FY2026

	Q1	Q2	Q3	Q4

Initial Scope Development
Jul 1 – Aug 25
55
EOC Discussion 7/15

Gather & Integrate Stakeholder Feedback
Aug 26 – Oct 31
66
EOC Discussion 10/21

Publish RFP
Nov 1 – Dec 15
44

Evaluate Proposals
Dec 16 – Jan 31
46

Finalize Contract
Feb 1 – Feb 28
27

Database Setup
Mar 1 – Apr 30
60

Full Transition
May 1 – Jun 30
60

■ Duration (Days)

COMMUTER CONNECTIONS® | A SMARTER WAY TO WORK

Dan Sheehan

TPB Transportation Operations Programs Director
(202) 962-3287
dsheehan@mwcog.org

commuterconnections.org

Metropolitan Washington Council of Governments
777 North Capitol Street NE, Suite 300
Washington, DC 20002

COMMUTER CONNECTIONS® | **A SMARTER WAY TO WORK**