Leveraging Customer Relationship Management to Advance Public Health

Appendix

- [ ] **"Fast Start" mini checklist (examples)**
  - Review last 3 months of outreach
  - Identify 2 problems to fix
  - Choose 3 indicators
  - Define 8–12 data fields
  - Pick the simplest tool that works

Phase 1: Plan (Understand the Problem)

- [ ] **Identify who should be involved (examples)**
  - Program staff who conduct outreach
  - Staff responsible for follow-up or coordination
  - Evaluation or data staff (if available)
  - Someone responsible for maintaining the system
- [ ] **Document current outreach and tracking practices (examples)**
  - Reviewed recent outreach activities (e.g., last 1-3 months)
  - Identified where partner information is currently stored
  - Noted inconsistencies or gaps in tracking
- [ ] **Identify priority challenges to address (examples)**
  - Duplicative outreach
  - Missed or delayed follow-ups
  - Lack of visibility across programs
  - Partner confusion or burden
- [ ] **Clarify what is already working (examples)**
  - Identified at least one practice worth preserving or scaling

Notes

- [ ] **Output to have before moving on:**
  - [ ] Short list (2-4 items) of CRM priorities
  - [ ] Shared understanding of current challenges

Phase 2: Define (Decide What to Track and Report)

- [ ] **Identify evaluation goals (examples)**
  - Community engagement
  - Partner relationship health
  - Service delivery or case management
  - Campaigns or events
  - Access / reach across organizations or communities
- [ ] **Select priority indicators (examples)**
  - Selected 3-5 indicators total
  - Indicators can be produced with existing staff capacity
- [ ] **Define reporting needs (examples)**
  - Identified who will review each indicator
  - Defined reporting frequency (monthly / quarterly)
  - Clarified internal vs. external use
- [ ] **Identify required CRM outputs (examples)**
  - Standard report(s)
  - Dashboard or summary view
  - Task or follow-up list
- [ ] **Define core data fields (examples)**
  - Organization
  - Contact name and role
  - Contact information
  - Assigned staff
  - Date of last interaction
  - Interaction notes
  - Status
  - Next follow-up date

Notes

- [ ] **Output to have before moving on:**
  - [ ] List of priority indicators
  - [ ] List of required reports/outputs
  - [ ] Finalized list of core data fields

Phase 3: Select & Improve (Choose and Refine the Tool)

- [ ] **Confirm tool fit (examples)**
  - Supports required data fields
  - Produces priority reports
  - Enables follow-up tracking
- [ ] **Assess usability and governance (examples)**
  - Staff can easily enter and retrieve data
  - Roles and permissions are clear
  - Training needs are manageable
- [ ] **Review cost and sustainability (examples)**
  - Cost fits budget
  - Internal capacity exists to maintain tool
  - Time burden is reasonable
- [ ] **Confirm data security (examples)**
  - Meets applicable data security requirements
  - Approved by relevant internal staff (if required)
- [ ] **Plan for continuous improvement (examples)**
  - Defined how feedback will be collected
  - Scheduled periodic review of CRM use
  - Identified how changes will be made

Notes

- [ ] **Output to have at completion:**
  - [ ] Selected tool or confirmed existing system
  - [ ] Clear process for data entry and use
  - [ ] Plan for ongoing review and improvement