



tcmhcc
Texas Child Mental
Health Care Consortium

Salesforce Implementation Update

Texas Child Mental Health Care Consortium – September 16, 2024

Cynthia Smith, Salesforce Administrator – Internal Evaluation Team, UT Austin
cynthia.smith1@austin.utexas.edu

Agenda

- Salesforce Overview
- User Story
- Project Team
- Timeline
- Next Steps
- Questions





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Salesforce Overview

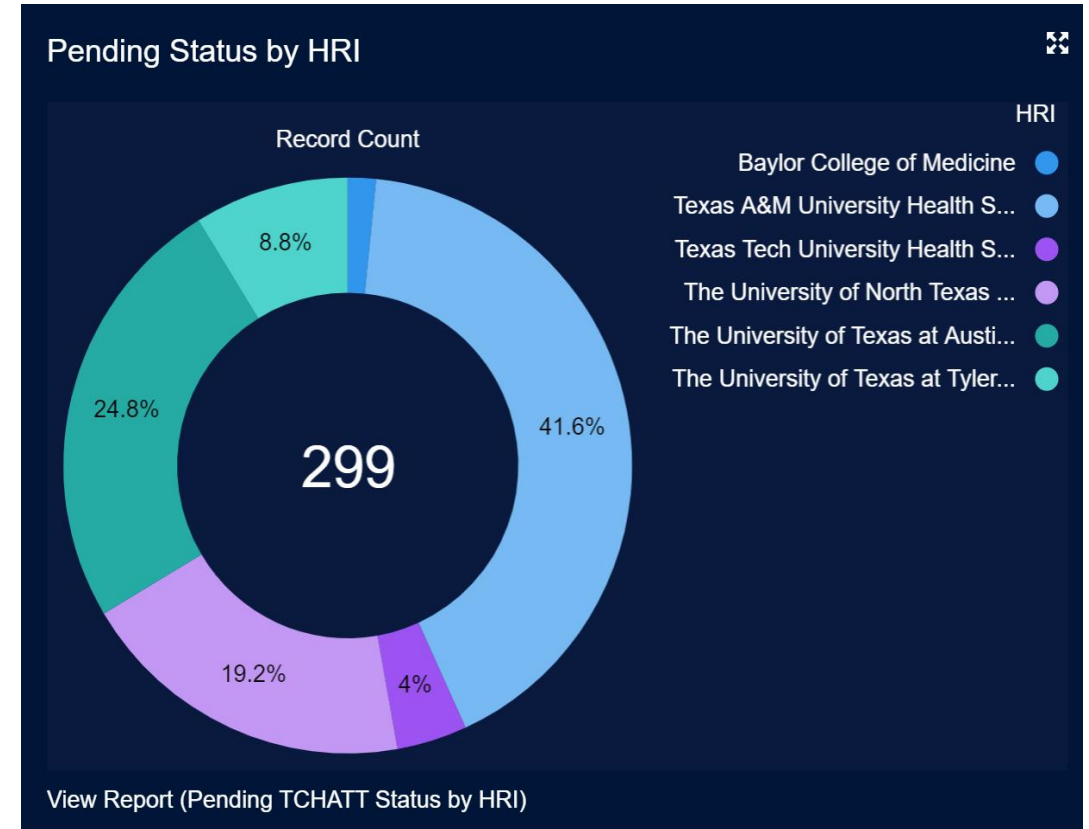
Salesforce Overview



- **What is Salesforce?**
- Customer relationship management (CRM) tool to help businesses connect with customers
- Cloud-based software platform
- **How will Salesforce be used?**
- Capture outreach efforts and other interactions with schools and districts related to TCHATT
- Manage TCHATT enrollment status
- Replace spreadsheets that HRIs are required to submit monthly

Salesforce Overview, cont.

- **How will Salesforce be used?**
- Search and retrieve real-time information related to TCHAT via reports and dashboards
- Target outreach efforts to potential or actual TCHAT users based on certain criteria
- Keep up-to-date information on schools and districts based on TEA data, including enrollment numbers
- **Salesforce will not...**
- Host any personally identifiable information (PII)
- Create duplicative work for HRI representatives
- Replace Trayt



Salesforce Overview, cont.



- **Current CRM Initiatives (Phase 1)**
- Manage all activities related to TCHATT enrollment
- Record professional development and outreach activities related to TCHATT
- **Future CRM Initiatives (Phase 2+)**
- Email communications and texting for TCMHCC and HRIs
- Manage staffing updates, such as new hires, inactive employees, title changes, and FTE allocations
- CPAN/PeriPAN provider enrollment
- CPWE monthly reports



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User Story

User Story

HRI Representative

- As an HRI representative, I want to take ownership of districts and schools in my assigned area and communicate with TCMHCC staff so that I can provide updates on TCHAT status, outreach, and event attendance.



Keep district, school, and contact records updated with most recent TCHAT-related information.



Document and manage outreach to schools.



Log attendance at educational and promotional events.





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Project Team

Project Team

COSH, UTS, and IE have worked together to define the scope of the Salesforce implementation in order to build a platform that will be user friendly, meet program requirements, and create efficiencies.

- Collaborating with HRI representatives on requirements related to TCHAT activities
- Working with marketing team to review communications policy related to branding in the Salesforce
- Engaging with TCHAT leaders to identify primary contact(s) for each HRI
- Met with external partners, e.g. TEA and Trayt
- Working with Slalom Consulting on Salesforce development and customization

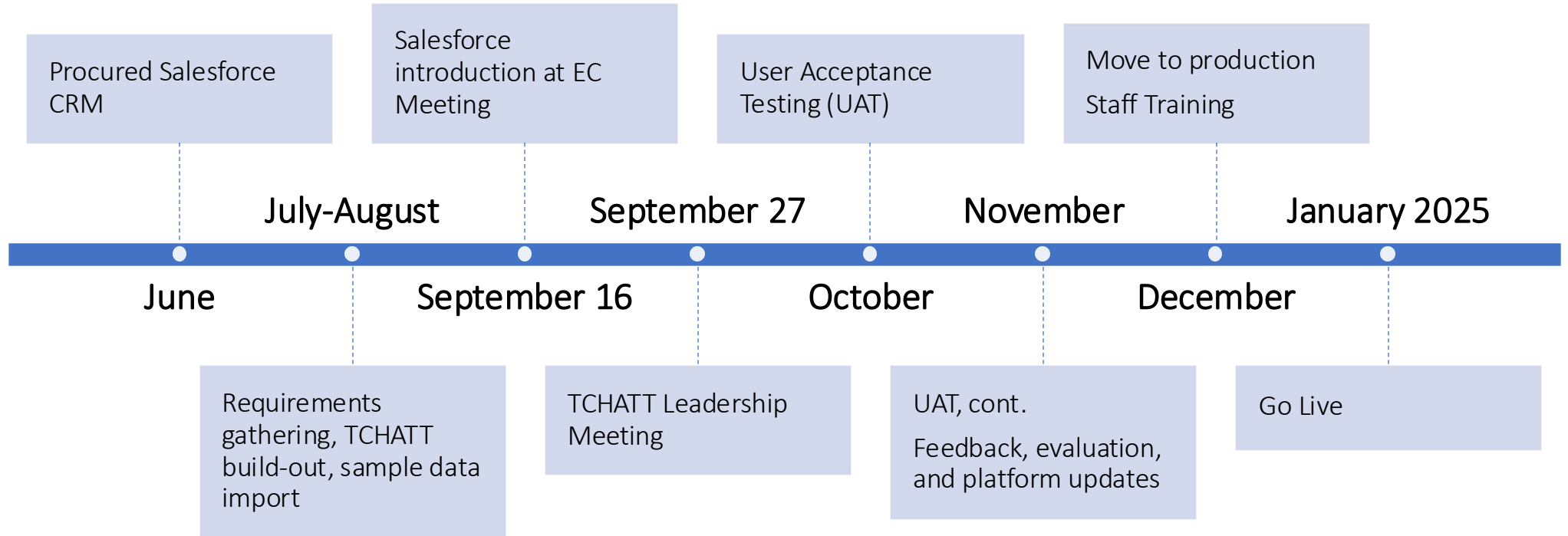




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Timeline

Implementation Timeline





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Next Steps

Next Steps

- Engage with TCHATT leaders to identify one primary point-of-contact per HRI
- Host User Acceptance Testing (UAT) kickoff call with points-of-contact
- UAT to begin mid-October





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Questions