



September 9, 2022

To: LMSC Volunteers (primarily those with access to membership and club database)

From: Dawson Hughes, CEO

RE: Salesforce CRM – Implementation Timeline and Process Adjustments

USMS is nearing completion of the final stages of the original scope of USMS's digital transformation, which will culminate with the launch of Salesforce database (CRM) to replace our current membership and club databases. Below is a general timeline of adjustments, an overview of what those adjustments mean, what systems will change, and how volunteers will be affected.

Phase 2, outlined below, will be the first point that any volunteers will see changes. The adjustments in Phase 2 will primarily affect membership coordinators and to a lesser extent, Top 10 recorders, sanctions chairs, and treasurers. Phase 3 will focus primarily on event sanctioning, which is when sanctions chairs will see more significant changes.

Definitions:

- **ESTHER** – Legacy custom-designed USMS software that currently hosts membership and club database, sanctioning, event results, financial reporting, and other operational functions.
- **Salesforce/CRM** – New software that will become the database of record for membership and clubs, sanctioning, and financial transactions and reporting, among many other process enhancements. More specifics of the adjustments and estimated timeline are below.

Salesforce CRM Implementation Overview

1. Phase 1 – Testing New Membership and Club Databases
 - **Began:** August 2022
 - **Systems updates:** member and club registration databases
 - **Volunteers affected:** none
 - **Overview:** member and club registration databases have been built in Salesforce and were turned on in parallel with ESTHER for testing. Registration will continue to happen on usms.org, as it does now, and data will be transferred to both ESTHER and Salesforce.
 - Starting testing at this time ensures a long testing and verification period.
 - Running Salesforce and ESTHER in parallel provides the opportunity to identify issues and fine-tune the new system to ensure they reconcile accordingly.
 - During this testing period, ESTHER will remain the database of record, while Salesforce will be read-only for testing purposes.
 - Staff will be using Salesforce only for testing and training during this phase 1.
2. Phase 2 – Launching New Membership and Club Databases
 - **Revised launch target:** Feb. 1, 2023
 - **Systems updates:** ESTHER member and club data will move to 100% read-only.
 - **Volunteers affected:** membership coordinators
 - **Overview:** member and club registration databases will be switched to Salesforce. ESTHER will remain in place running in parallel and all data will continue to be placed into both systems. Member records in ESTHER will continue to be used for event-related information (results, rankings, records, etc.).
 - Membership coordinators can read all the same data in ESTHER and will not have direct Salesforce editing access.



- Members and clubs will be able to make nearly all account updates through their My USMS account or the club admin dashboard; that will update both Salesforce and ESTHER.
 - We will be implementing an online form, with real-time integration (API), that will assist membership coordinators with processing member information updates and transfer requests, when necessary. This will update both Salesforce and ESTHER.
 - Event sanctioning and results editing, approving, and uploading access will remain the same through the USMS admin tools in ESTHER.
 - Membership coordinators will receive training, tutorials, and videos in advance of launch.
3. Phase 3 – New Event Sanctioning and Calendar of Events
- **Launch date:** tentatively planned for second half of 2023.
 - **Systems Updates:** sanction process will be improved, and the current sanction process in ESTER will be shut down. Those applying for sanctions will need a login and password to ensure the file upload process is secure. Salesforce workflows will be used to process sanctioning requests. The calendar of events will have a new look.
 - **Volunteers affected:** sanctions chairs, open water chairs, National Open Water Advisor
 - **Overview:** improved sanction process integrated within Salesforce including updates to calendar of events.
 - The scope and details are in the final planning stages.
4. Phase 4 – New Event Results, Rankings, and Records
- **Launch date:** tentatively planned for 2024
 - **Systems updates:** New event results uploading process and public viewing of event results
 - **Volunteers affected:** Top 10 recorders and national swims coordinator
 - **Overview:** results will be the last major component of ESTHER. There are several options for the future that will be researched, and we will communicate plans and updates as they become clearer. Discovery will begin as Phase 3 gets underway, with any potential changes being scoped after that process is complete.
 - Key volunteer stakeholder groups will be consulted as part of the discovery stage of this project.