What You Need to Know Now
About the CORE CRM System Rollout

A Q&A with Amanda Capozio, SCORE Webmaster

Rollout of the new SCORE CRM system (CORE) is approaching. As the phased rollout nears, here's some information to help you know what to expect leading up to and during the implementation.

Q. What can volunteers anticipate in terms of when the new system will roll out to their chapters?

We will be rolling out the new system to Districts 101, 507 and 480 in November and December. After that, SCORE will roll out the system to the remaining chapters starting in March 2014. A detailed timeline will be added to the [CORE System page](#) on the support site in the upcoming weeks.

Q. What training and resources will be available to members before, during, and after rollout to help them navigate the new system?

Prior to the CORE rollout, training will be available to the chapters and will include webinars, interactive online training, and one-on-one training. Volunteers will also have access to many how-to guides and webinar recordings. On the support site's [CORE System page](#), you'll find information regarding the rollout including:

- 20-minute walk-through of the scheduling portion of the system
- CORE Overview webinar recording
- WebIT/CORE comparison PowerPoint presentation comparing the screens in each system
- Timelines & Updates
- Current Bugs & Requested Enhancements
- Volunteer & Admin Training Guide

Q. How will this CRM rollout be handled differently than last time?

This rollout will not be completed all at once, but rather gradually implemented at chapters over the next 6 months or more. This approach will allow us to provide more hands-on training and enable us to provide chapters with more support than was available with the previous CRM implementation. By using volunteers' same usernames

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and passwords for CORE that they use to access WebIT, we also hope to eliminate the login issues we had before.

Q. Will CORE provide any new capabilities and efficiencies to volunteers to make their work easier?

Volunteers will no longer need to log into multiple systems to get things done. All SCORE systems can be accessed with one login and through one site. The CORE system allows users to search for volunteers nationwide; they aren't limited to only the resources within their chapter. Also, volunteers will be able to track the activity of their clients - what workshops they attended, what mentoring they had, and what online workshops they took. You'll able to pull client activity reports with all of that information as well. In addition, the CORE system offers a scheduling calendar to chapters who want to use it. That enables clients to conveniently schedule their own mentoring appointments online.

Q. Is there anything volunteers should do now to prepare for the rollout?

There are two things we recommend that volunteers do in advance of the rollout to their chapters:

1. Check out the resources available on the CORE System page on our support site.

 2. Login to the Volunteer Center and navigate through the system. Doing so will ensure you're able to access the CORE system when your chapter is migrated over to the new system.

Q. Who should volunteers contact with questions?

Any questions and/or comments should be sent to help@score.org.

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