

A custom CRM, written down before we build anything

For Mark, for the October or November annual planning conversation.

From Jason Lowery

Date September 30, 2026

Based on the September 25, 2026 call (Martin, Jason, and Kyle). Mark was not on that call.

Recording fathom.video/calls/835818028

READ THIS FIRST

This is a planning note only. On September 25 we put a pin in the CRM and agreed to bring it to you before anyone builds it. I said I would write a plan, not a prototype, so we can talk it through in person.

The build stays on hold until that fall conversation. Nothing in this note is a price, a start date, or a promise to begin.

Why this is a planning document

Martin asked that the CRM idea be written down so you and he are looking at the same picture at the next meeting. He also said the annual fall meeting, the one where you look at the next 12 months, is likely in October or November. Clinical evaluations are part of that same conversation. The CRM is a separate topic that was parked until you are in the room.

What I am asking this note to do is small: name the pieces that were actually described, say how they sit next to the dashboard you already have, and list the decisions that are still open. If the call did not settle something, I have marked it as a decision for the fall conversation, not as a commitment.

Why it came up, and what it is not

The CRM came up because day-to-day work is heavy, not because a product was chosen.

- Martin said the school is processing about 375 to 400 students a month. Four years ago, with the same size staff, that number was about 40 to 50 a month.
- He said growth in the risk-reduction program has eased to about 60 percent year over year, after years that were above 100 percent. He also restated a longer aim of 600 students this year, then 1,000, then 2,000. That is his business aim. It is not a target for this CRM, and this note does not plan it.
- He described clinical evaluations as the next growth idea for the fall meeting: a market price he put near \$175, and a charge the school might try of about \$250 or \$275. That program is context. It is not a feature of this CRM.
- Paulding County public-record prospects were discussed as one way to reach people for that clinical-evaluation outreach. The prospect list is already a dashboard tool. It is context for why a CRM is the next conversation, not a piece of the CRM.

Three things were talked about on that call and have since been finished. They are not part of this CRM plan: Randy's Conversations app on his iPhone, the weekday end-of-day text to Martin and Mark when messages are still waiting, and the Georgia-address filter with contact confidence scores on DUI Prospects.

The pieces that were named

These are the pieces Martin described, in plain language. None of them are built. How far each one goes was not decided.

1. An attendant for service calls

Martin's point was an attendant that can take a lot of the routine service calls, so staff are not doing that work by hand.

The examples he gave were specific. Someone calls and asks for a copy of their certificate. Or a parent calls about their child, gives an address, a phone number, and other details that match the file, and the attendant can say the certificate was sent to the email already on the file.

He called it an AI attendant. What it is allowed to say, which calls it may take, and which calls still go to a person were not decided. That is a fall decision.

2. Certificates from OCRA, looked up and sent without a manual search

OCRA is the state's Online Certification Reporting Application. Today, when someone needs a certificate, a person searches that state database by hand.

The idea on the call was that the system would sign in with the school's own login, look the certificate up, and deliver it. Martin tied that both to someone requesting a copy and to creating the certificate in the first place.

I said on the call that the state will change that database over time, so keeping the lookup working is ongoing upkeep, not a one-time switch. No timing for that work was set.

3. A file repository

Martin described a place where files are kept apart by the kind of student, so an analyst can open a student's files and review them. He said the files for a company could be uploaded there and checked for accuracy.

The practical point, which I agreed with, is that staff would stop hunting through email or through some other database to find the file. File upload was named. A finished design for it was not.

4. Said nearby, and not yet a CRM piece

Earlier in the same call, Martin talked about tracking where a person is in the process: leads, call-backs, and the path through a program. He tied that to an internal question about a dedicated salesperson for consumer leads, so Randy can stay on attorney and referral relationships. That hire was an idea, not a decision, and it was not defined as a CRM feature.

He also said the people who will use a system like this are everyday computer users, not only the technical group. If a CRM is built later, it has to be usable by the front office. That is a requirement he named, not a screen that exists.

How this relates to the dashboard

The dashboard in use is dh-admin-dashboard.pages.dev. It already holds DUI Prospects and Conversations. Those tools stay as they are. This note does not add to them.

On the call I said most of the student data is already there. What is not there is one place that ties files, certificate requests, and service calls together, plus file uploads and the OCRA lookup. Martin made the same distinction in different words: the work so far has been separate modules. A CRM would be the first time those modules were planned as one system. That planning has not been done, and the CRM layer is not built.

Decisions for October or November

These are open. Agreeing on them is what “done” means for this fall conversation. It does not mean the CRM is done, and it does not authorize a build.

DECISION	WHAT THE SEPTEMBER 25 CALL ACTUALLY LEFT OPEN
Build our own, or buy one	I said I would rather build it than pay for a CRM that cannot do this work. Martin said we could probably build one. You were not in that conversation. The choice is still yours to make with him.
What is in scope	The named pieces are the service-call attendant, OCRA certificate lookup and delivery, and the file repository. Whether all three are in, or only some of them, was not decided. Martin said we still have to scope it and say what it looks like.
What “done” means	For this fall, done means a shared picture you can mark up. The call never defined what a finished CRM is. That definition is part of the conversation, not something this note can set.
What stays out	Clinical evaluations, postcard and ad outreach, a salesperson hire, and the prospect-list work are separate topics. They explain the pressure. They are not features of this CRM unless you decide otherwise.
Whether to look at the work first	Kyle suggested sitting with the people who do the work and listing the tasks they repeat. Martin agreed that is the place to start. I said it would take a real block of time, on the order of a couple of hours, to understand it. No date was set. Whether that conversation happens before a tighter scope is a fall decision.

Until those decisions are made, building stays on hold. I will not start a prototype off this note.

What this document is not

- Not a quote. There is no price in it, because none was discussed.
- Not a build schedule. No start date, no phases, and no staffing plan were set.
- Not a prototype. There are no screens to click, and none were promised.
- Not a change to the dashboard. Prospects, Conversations, and the three items already finished stay outside this plan.

If you want to change the picture before October or November, mark this up and send it back. That is what it is for.

Jason Lowery

September 30, 2026

Planning note for Mark, Dallas Hiram DUI / West Metro. September 30, 2026. Not a quote, not a schedule, and not a prototype. The CRM build stays on hold until the fall planning conversation.