Instructions for the Partner Action & Communication Tracker (PACT) Form

You must complete all the fields marked with a red asterisk (*) before you submit each page.

The PACT Form captures each partner’s engagements: who, what, when and why. After every meeting, call or important email with a partner, fill out a PACT form to capture essential information. The appropriate person within Olin receives an automated notification after the form submission so they can follow up quickly. The information automatically updates the Olin Customer Relationship Management database (in Salesforce) for tracking and reporting.

The PACT Form has three main parts.

- Part 1 collects information about you as the person submitting the form.
- Part 2 collects information about the primary contact person from the meeting or engagement.
- Part 3 collects information on the business or organization and meeting notes about the Olin opportunities (areas that require action or follow-up with the partner).

Part 1

Type in your full name. If your contact information is already in the Olin Customer Relationship Management database (Olin CRM), it will auto-populate all the fields. If not, add yourself to the system and skip the 18-digit SFID.

Always review the details that have been populated and update as needed.

Add the meeting date and subject line in the Meeting Topic/Intent field and select if the dean was present.

Click “Submit” to save and advance to Part 2.
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Part 2
Type the name of the primary contact person you met with, and it will search to see if they are already in the Olin CRM database. If a record is found for this person, it will auto-populate the remaining fields. If not, add the contact details. The minimum requirements are First Name/Last Name/Email. However, more information is better. If multiple names are displayed when you type in the contact person’s name, check the information that automatically populates the form to confirm you selected the right contact person. If you have questions about duplicate contacts, please get in touch with olincrm@wustl.edu for help.

Always review the details that have been populated and update as needed.

Partner Action & Communication Tracker (PACT) - 2

Full Name:

Information will populate below if a Salesforce contact is found, please fill in all required information to update or if not found.
First Name *  Last Name *

11 Digit Salesforce Primary ID

Title/Position *

Company *

Email *

Phone Number

Check a box if the contact is an Olin alum or a WashU alum.

Is this person an Alumni?

☐ Olin Alumni  ☐ WashU Alumni

If the contact is an Olin alum, add the program and graduation year if known.

Program  Graduation Year

If the contact is a WashU alum, add the school, program and graduation year if known.

School

Program  Graduation Year

Click “Submit” to save and advance to Part 3.
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Part 3
Type the name of the company/organization. If the information is already in the Olin Customer Relationship Management database (Olin CRM), it will auto-populate all the fields. If not, add the company/organization details. The minimum requirements are city, state code and zip. However, more information is better.

Always review the details that have been populated and update as needed.

If the account/organization has an international address, check this box: [ ] International Address
Add the details and select the country from the dropdown.

Select an industry from the dropdown. Type of organization is for informational purposes only. In St. Louis, it is a required field.
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Part 3 continued
Select a diversity classification if known.

Select an opportunity type based on the meeting conversation. For each opportunity type selected, a notes box will display for input and guided suggestions. More information is better for the case reviewer.
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Part 3 continued
In the notes box, fill in as much detail as possible. Doing so helps the case reviewer.

This question is a required field.
Answering Yes allows additional contacts to be created. A new contact page will display after clicking submit.

Another notes field for more information on the meeting or contact.

Click submit when completed.