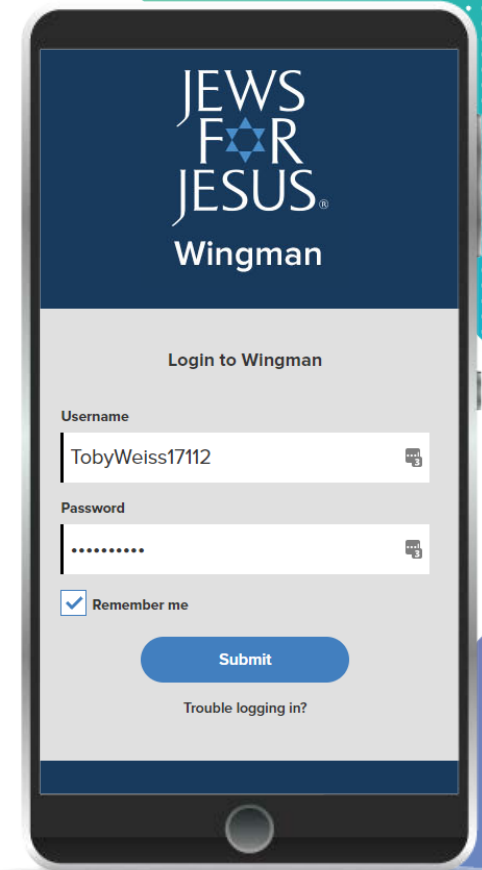


Mobile App and 2-way Integration for CRM Contacts

- ▶ Toby Weiss, Chief Information Officer
- ▶ Jews for Jesus





“Create a user friendly, mobile first, multi-lingual app for contacts, reminders and activity tracking.”





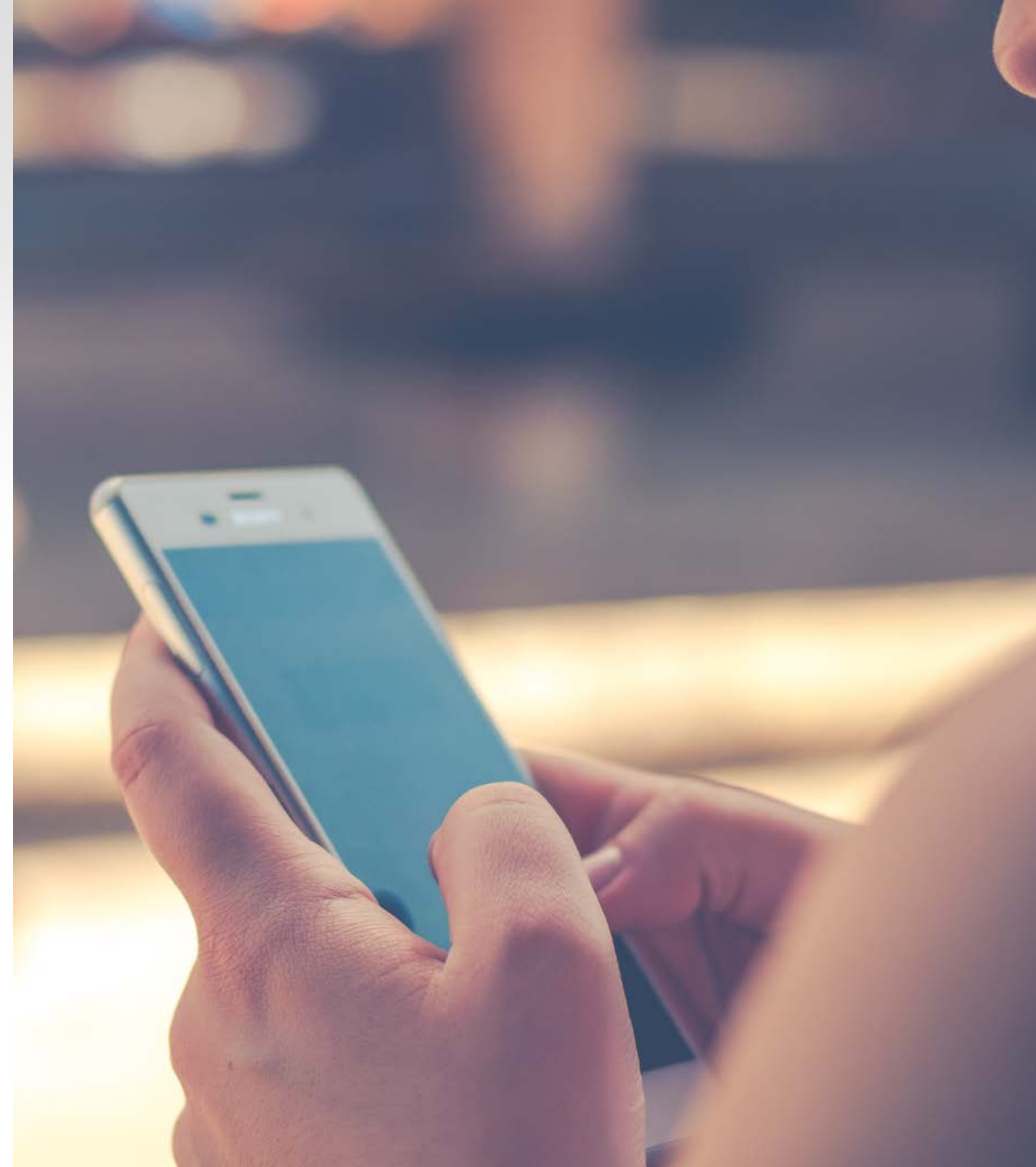
“The App and our CRM must remain totally in sync for all contact details.”



Building an app for field staff: WINGMAN

Need for an App supporting:

- Non-English speaking staff
- Mobile-first design
- Simple user experience
- Availability on any device
- Very fast response times





Wingman

Features of the application

Features

➤ Contact Management

- Add / Update
- Search / Saved Search
- Favorites

➤ Reminders

- Follow-up
- Fast actions

➤ Activity Tracking

- Engagements
- Projects / Events
- Volume

Features

► Dashboard

- Attractive charts of activity
- Instant results
- Shared by all staff in real-time
- Geo-location of engagements with contacts

► Reports

- Detailed reports of activity
- For individual staff
- For branches
- For the entire organization



Wingman

Technical Requirements

Technical Requirements

- All devices types and sizes
 - Mobile
 - Tablet
 - Desktop
- All Operating Systems
 - Windows
 - Mac OS
 - Android
 - iOS
- User Experience
 - User friendly – minimal training required
 - Very fast response times

Technical Requirements

- Multi-lingual
 - English
 - Hebrew (NOTE: Hebrew is a right to left language!)
 - Russian
 - French
 - German
 - Hungarian
- Global users
 - Application must be available and responsive worldwide
- Integration of contacts with BB CRM
 - Contact adds and updates synced in both directions (more later)



Wingman

Technology Used to build

Technology Stack

- Hosting: Microsoft Azure
 - Quick to deploy
 - Global scale
- Database: Microsoft Cosmos DB (NoSQL)
 - Focus on speed of data access
 - Agile design
- Back-end: .Net Core
 - Shared skillset with BB CRM Developers
- Front-End: Angular JS
- Application type: Single Page Application Progressive Web App (SPA PWA)
 - Supports all device types and browsers with a single code base
 - Same usability as a native app



Agile Development Team

Domestic and Off-shore developers

Development Team

- Agile Kanban project management
- UI/UX Designers at US firm
- Development team in India
 - 1x Front-end Angular JS / HTML / CSS
 - 2x Back-end .NET Core and Cosmos DB
 - 2x Integration and BB CRM
 - 1x Quality Assurance
- Project Management via local team
- Tools: GitHub / Slack / Trello / Zoom / Visual Studio



Let's take a look at Wingman

Responsive design: 1, 2 or 3 columns

The smartphone view displays a single-column layout. At the top is a header bar with the 'JEW'S FOR JESUS' logo and a '+ Add' button. Below this is a green section header 'Add Engagement'. The form fields are stacked vertically: a title bar 'Contact Details' with an expand/collapse arrow, followed by radio buttons for 'Mr.', 'Mrs.', 'Miss', 'Ms.', and 'None'. Then are text input fields for 'First Name', 'Last Name', 'Email', and 'Phone'. At the bottom are 'Gender' and 'Age Range' fields. A bottom navigation bar contains the 'JEW'S FOR JESUS' logo, '+ Add', 'Search', and 'Menu' icons.

The tablet view displays a two-column layout. The top header bar is identical to the smartphone view. The main content area is split into two columns. The left column contains the 'Contact Details' section (expandable), with radio buttons for titles, and text input fields for 'First Name', 'Last Name', 'Email', and 'Phone'. The right column contains the 'Engagement Details' section (expandable), which includes: 'Engagement Level' with radio buttons A, B, C, and M; 'Engagement Type' with radio buttons Initial, Follow-up, and Ongoing/Visit; 'Engagement Method' with a sub-section for 'Live' containing radio buttons for Individual, Group, and Text; and 'Contact Code' with radio buttons JB, UJ, GB, UG, and ?. A bottom navigation bar is shared with the smartphone view, containing the logo, '+ Add', 'Search', and 'Menu' icons.

Jews for Jesus

+ Add

Search

Summary

My Activities

My Contacts

Reminders

Saved Searches

Change Language

Admin Section

Log out

Add Engagement

Contact Details

☐ Mr.

☐ Mrs.

☐ Miss

☐ Ms.

☐ None

First Name

Last Name

Email

Phone

Gender

☐ Male

☐ Female

☐ ?

Age Range

Engagement Details

Engagement Level

☐ A

☐ B

☐ C

☐ M

Engagement Type

☐ Initial

☐ Follow-up

☐ Ongoing/Visit

Engagement Method

Live

☐ Individual

☐ Group

☐ Text

Contact Code

☐ JB

☐ UJ

☐ GB

☐ UG

☐ ?

Location

Add Follow Up Reminder

☐ Add Reminder

Reminder Note

Add Engagement

Reset

blackbaud®

@TobyWeiss

Blackbaud CRM™ DEVELOPERS' CONFERENCE

Adding Contacts & Engagements

Engagements describing an interaction with a contact, includes geo-location, ratings, etc.

Recording a contact along with an engagement is optional

Supports fast phone input including dictation

The screenshot shows the 'Add Engagement' form in the Blackbaud CRM mobile app. The form is organized into two columns. The left column, titled 'Contact Details', contains fields for contact information: First Name (Mark), Last Name (Smith), Email (mark.smith1@gmail.com), Phone (123-123-1235), Gender (Male), and Age Range (31-45). It also includes checkboxes for 'Create Contact' and 'Add to my contacts'. The right column, titled 'Engagement Details', contains fields for engagement information: Engagement Level (B), Engagement Type (Initial), Engagement Method (Group), Contact Code (UG), Location (SF, CA, 94102, US), Date (06/11/2018), Missionary (Toby J. Weiss), Branch/Campaign (San Francisco), and a Notes field. The top navigation bar includes links for Add, Search, Summary, My Activities, My Contacts, and Menu.

Automatic duplicate handling



Contact matching based on
names, email, phone, Facebook,
partial address match

Automatically associates a new
engagement with an existing
contact if there is a match,
preventing duplicates and the need
to search

Volume Activity

Quick way to record activities-in-bulk such as letter writing, emails, literature distributed, visits, phone calls

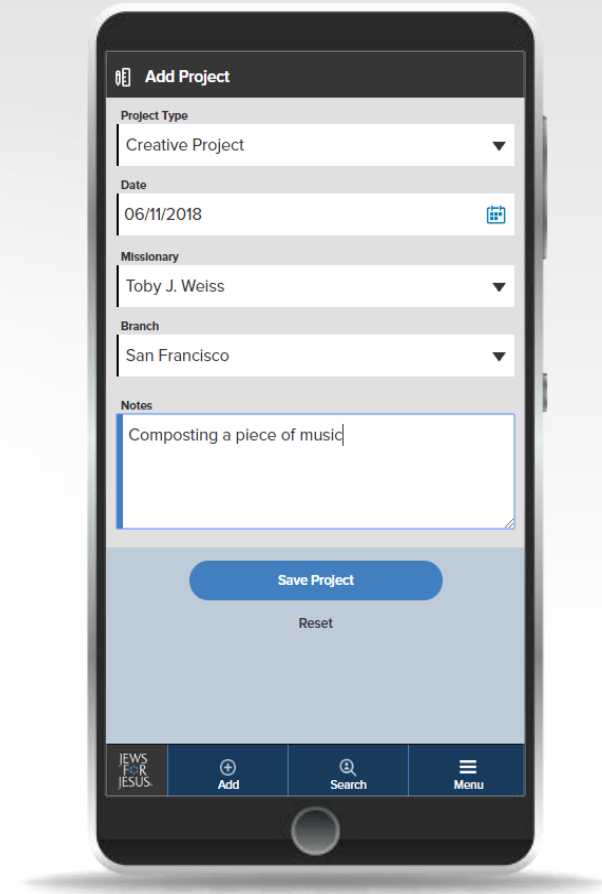
Add Volume Activity

Number of Literature	0	+	-
Number of People Served	25	+	-
Number of Postcards	0	+	-
Number of Letters	30	+	-
Number of EBlast Recipients	1500	+	-
Number of Calls Attempted	0	+	-
Number of Doors Attempted	0	+	-
Number of Visits Attempted	0	+	-
Date	06/11/2018		

JEW'S FOR JESUS | Add | Search | Menu

Projects

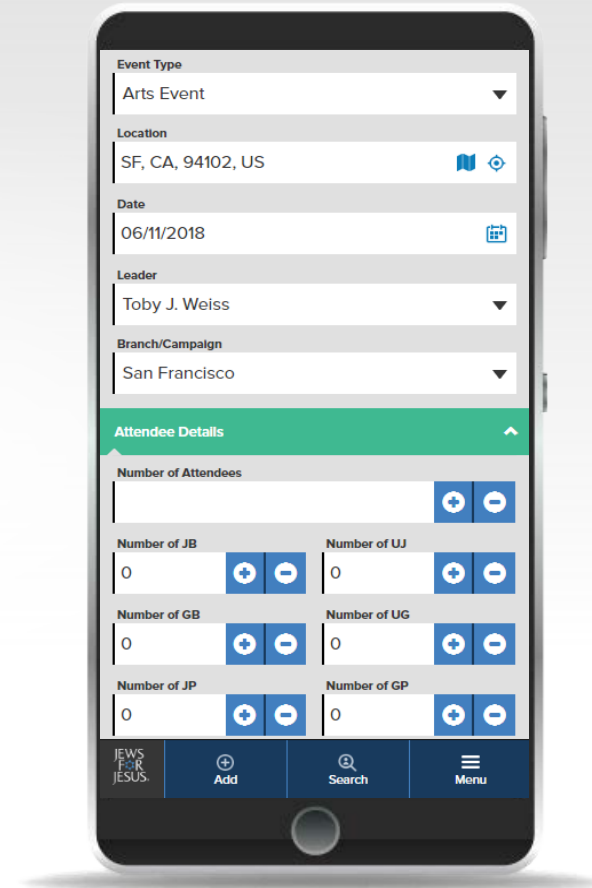
Record a project (such as an interview or art project) for activity tracking



Events

Event details including attendee counts

Includes geo-location



Search

Quick search feature to instantly find a contact by name or ID

Quick call lists (automatic exclusions)

Advanced search options

Saved search – save and repeat complex searches

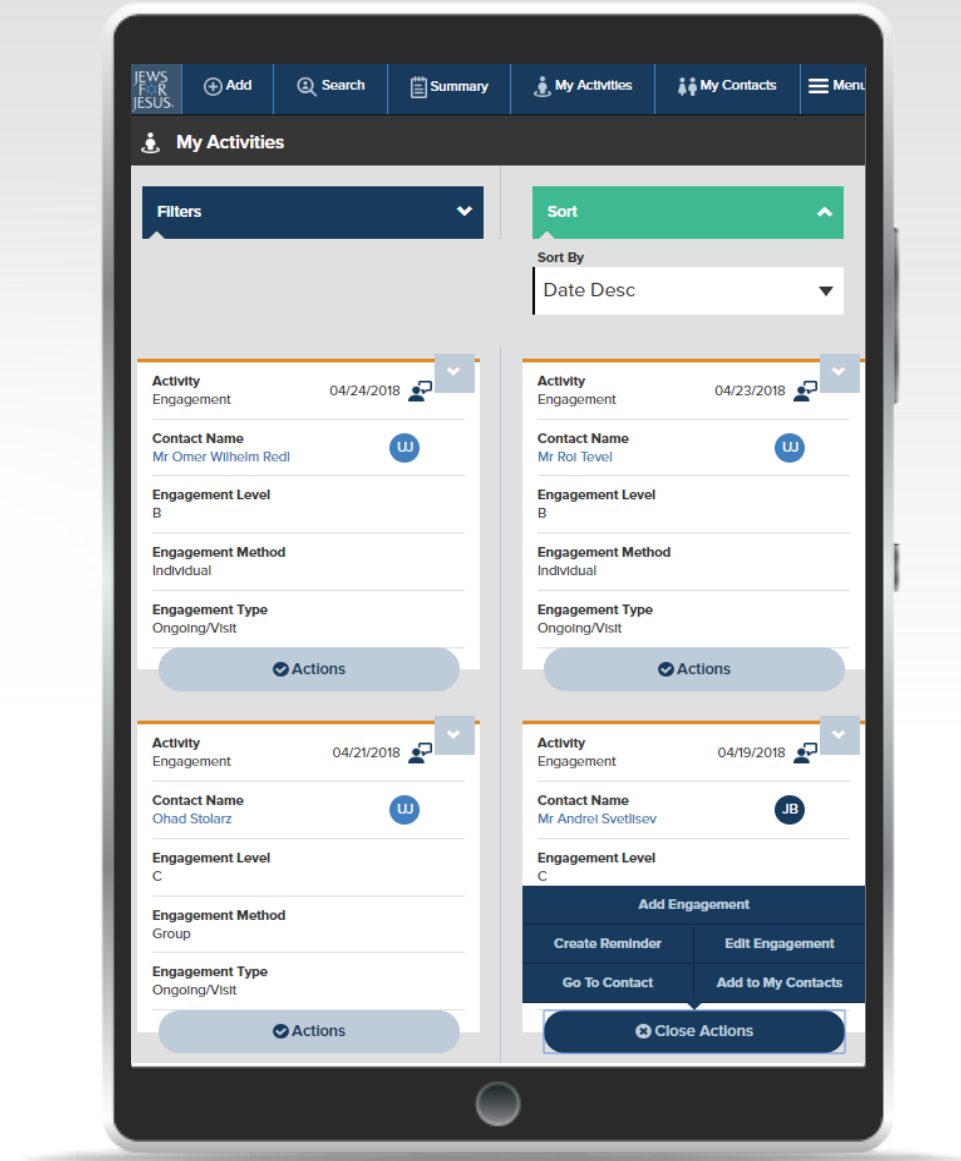
The screenshot shows the Blackbaud CRM search interface on a tablet. The top navigation bar includes 'Add', 'Search', 'Summary', 'My Activities', 'My Contacts', and 'Menu'. Below this is a 'Quick search' input field. The main interface is divided into two columns. The left column, titled 'General Details', contains fields for 'Contact Code' (with options JB, UJ, GB, UG, and ?), 'Gender' (Male, Female, and ?), 'Age Range' (a dropdown menu), 'Call List' (a checkbox), 'Visit List' (a checkbox), 'Contact Added' (a label), 'Start Date' (a date picker), and 'End Date' (a date picker). The right column, titled 'Contact Details', contains a 'Past Engagement Details' section with a 'Limit search to most recent engagement' checkbox, 'Engagement Level' (options A, B, C, and M), 'Engagement Method' (options Individual, Group, and Text), 'Engagement Type' (options Initial, Follow-up, and Ongoing/Visit), and 'Ministry Details' (a dropdown menu). The interface is clean and modern, with a focus on user-friendly search options.

My Activities

View of past engagements,
projects, events, volume activities

Card view with quick actions

Simple filters and sort options

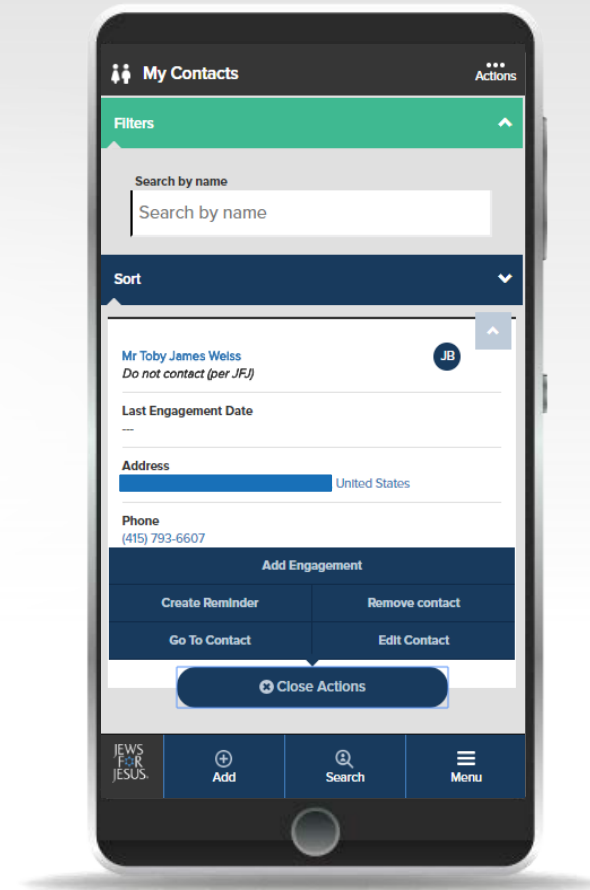


My Contacts

Bookmark contacts for fast access

Quick filter by name

Quick actions such as 'add engagement' or 'create reminder'

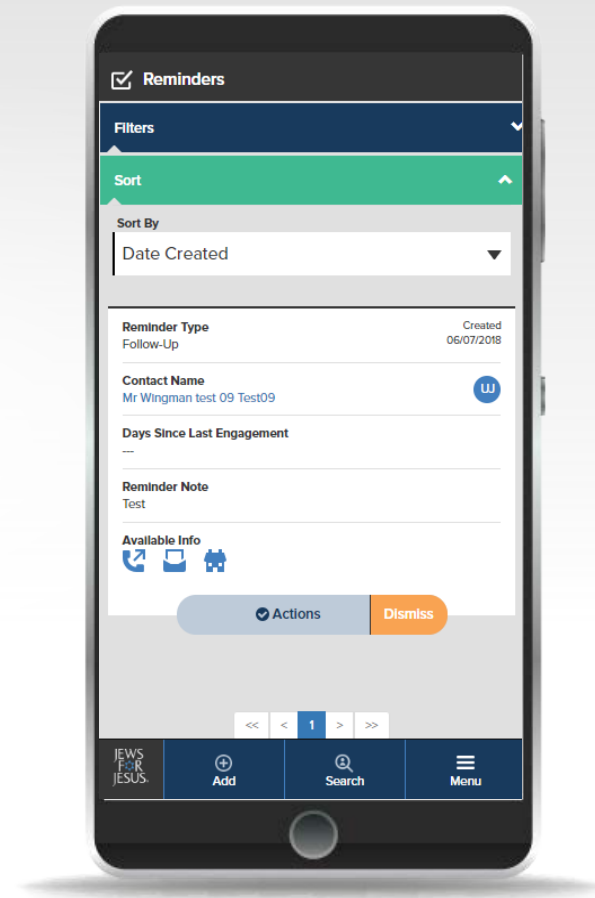
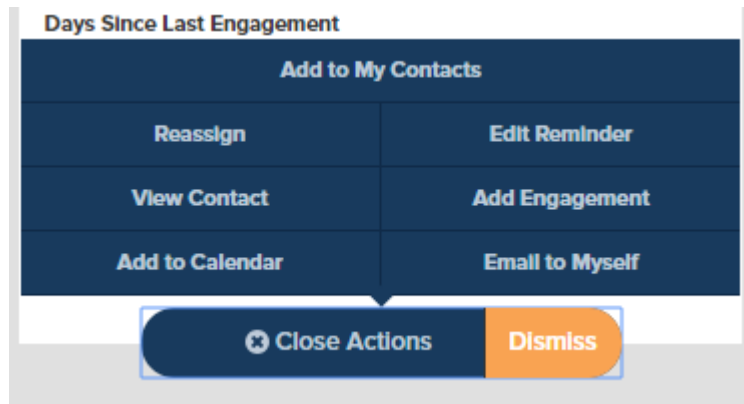


Reminders

Ensure a contact is followed-up with

Options to 'add to calendar' or 'email to self'

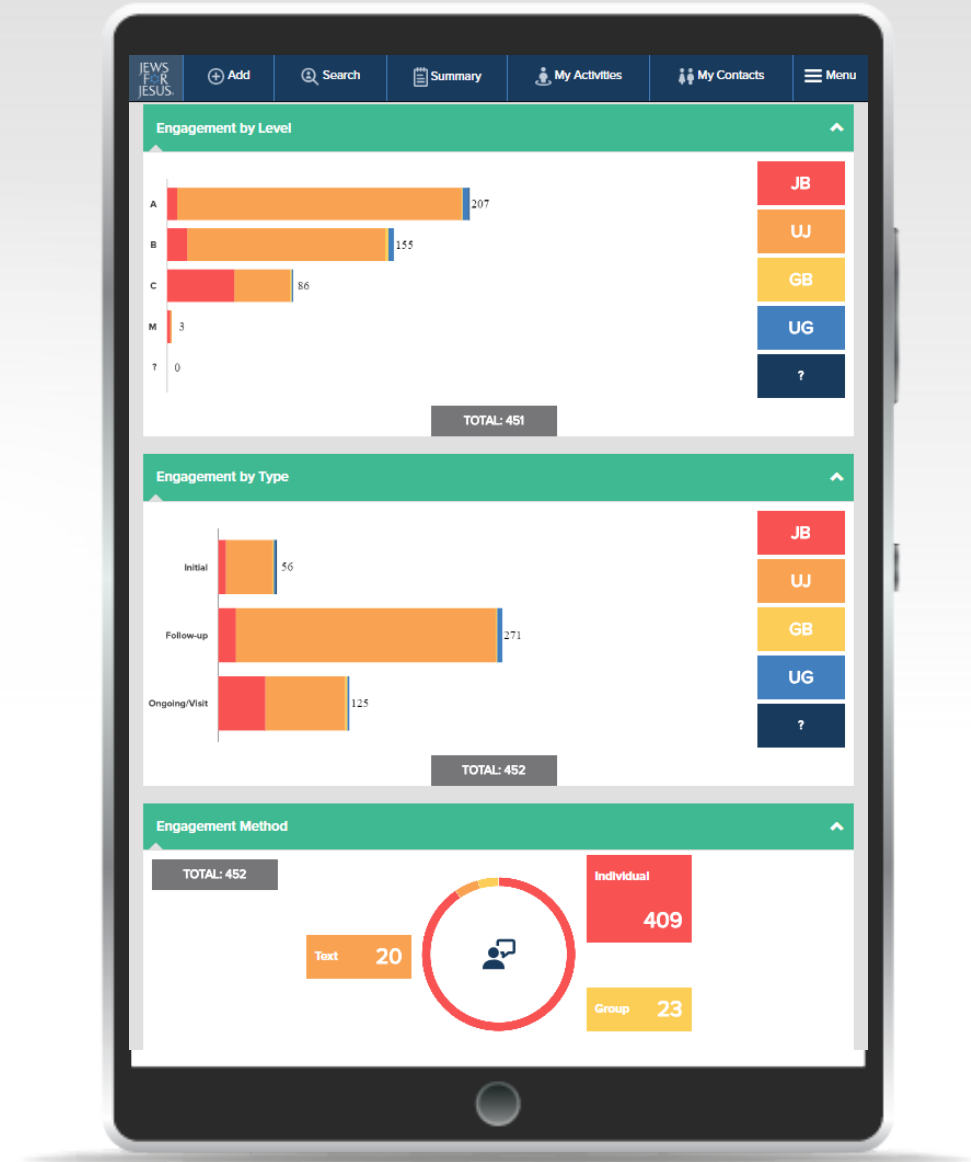
Quick actions to call, text or email, view map (instant on smartphones)



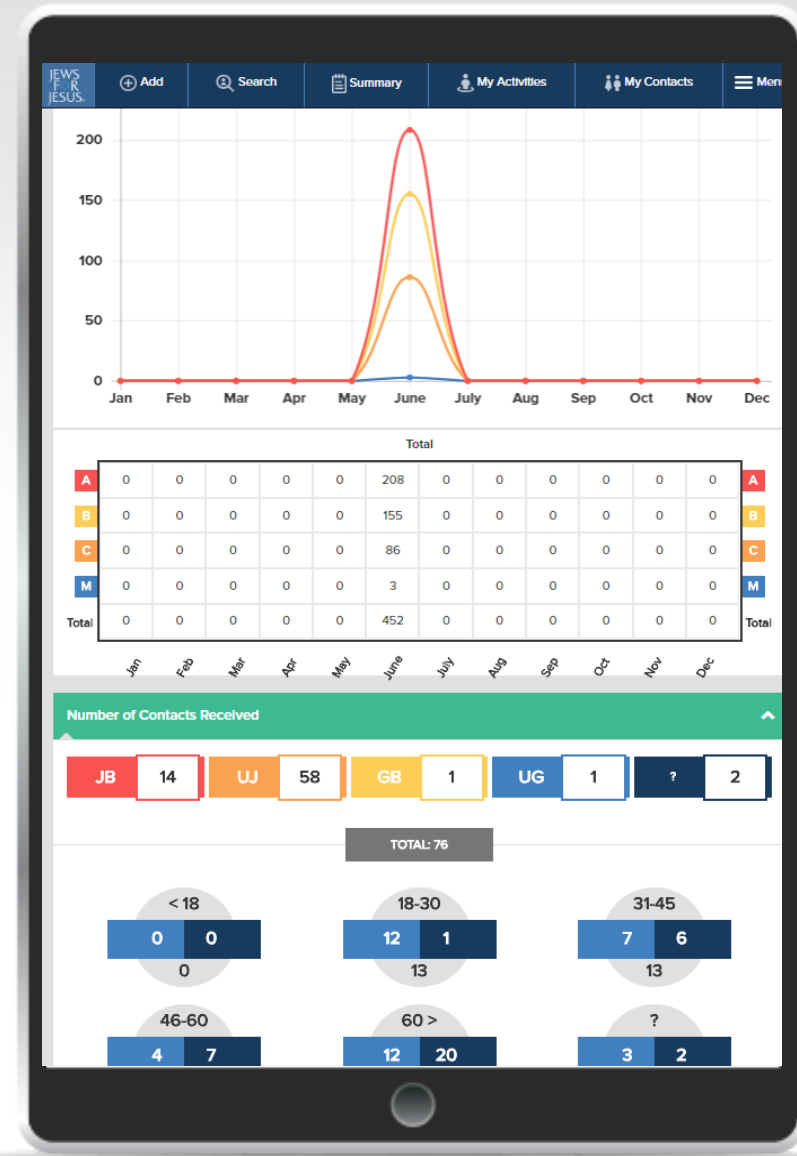
Dashboard

Instantly updated charts of activity for individuals, branches, countries or the entire organization

Allows for easy and instant reporting and team collaboration



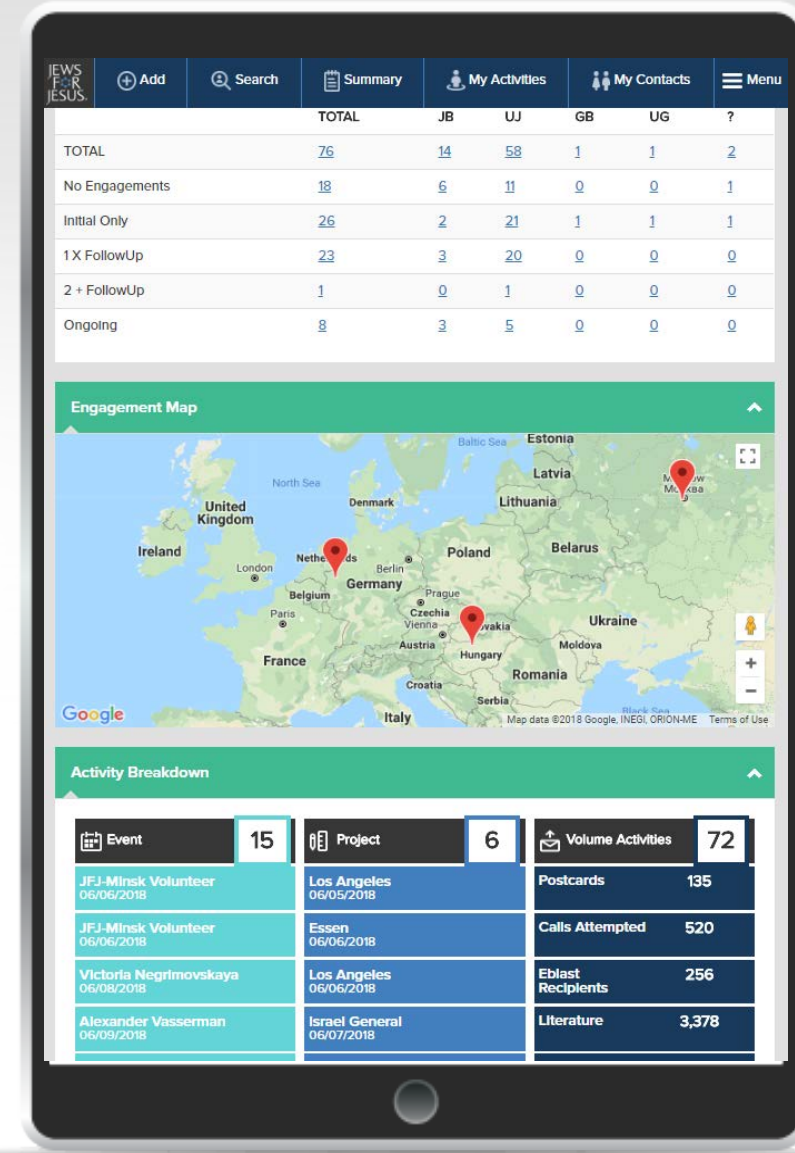
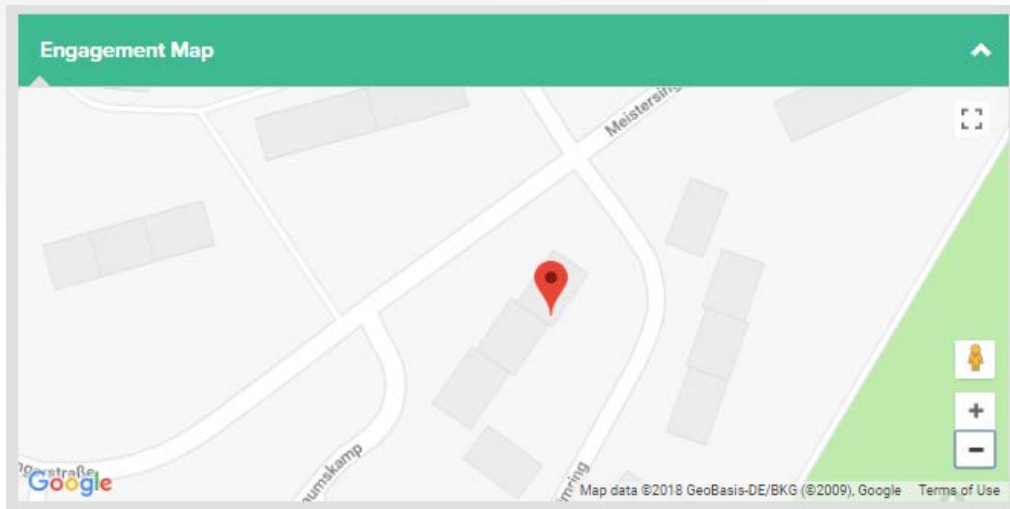
Dashboard



Dashboard



Geo-location – know which areas have been most effective for engagements

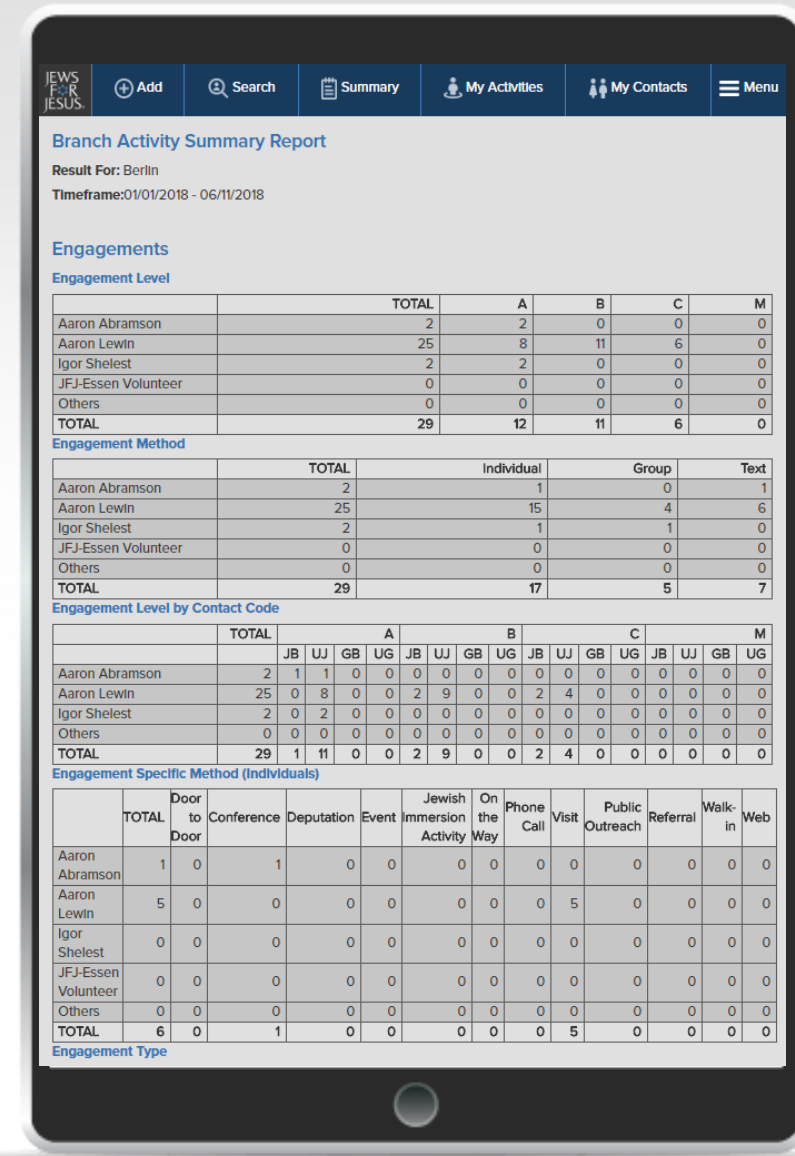


Reports

Detailed numeric reports by individual, branch or for the entire ministry

Permissions (only those with sufficient access can view reports for others)

Exportable to PDF



JEWS FOR JESUS | Add | Search | Summary | My Activities | My Contacts | Menu

Branch Activity Summary Report

Result For: Berlin
Timeframe: 01/01/2018 - 06/11/2018

Engagements

Engagement Level

	TOTAL	A	B	C	M
Aaron Abramson	2	2	0	0	0
Aaron Lewin	25	8	11	6	0
Igor Shelest	2	2	0	0	0
JFJ-Essen Volunteer	0	0	0	0	0
Others	0	0	0	0	0
TOTAL	29	12	11	6	0

Engagement Method

	TOTAL	Individual	Group	Text
Aaron Abramson	2	1	0	1
Aaron Lewin	25	15	4	6
Igor Shelest	2	1	1	0
JFJ-Essen Volunteer	0	0	0	0
Others	0	0	0	0
TOTAL	29	17	5	7

Engagement Level by Contact Code

	TOTAL	A				B				C				M			
		JB	UJ	GB	UG	JB	UJ	GB	UG	JB	UJ	GB	UG	JB	UJ	GB	UG
Aaron Abramson	2	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Aaron Lewin	25	0	8	0	0	2	9	0	0	2	4	0	0	0	0	0	0
Igor Shelest	2	0	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Others	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	29	1	11	0	0	2	9	0	0	2	4	0	0	0	0	0	0

Engagement Specific Method (Individuals)

	TOTAL	Door to Door	Conference	Deputation	Event	Jewish Immersion Activity	On the Way	Phone Call	Visit	Public Outreach	Referral	Walk-In	Web
Aaron Abramson	1	0	1	0	0	0	0	0	0	0	0	0	0
Aaron Lewin	5	0	0	0	0	0	0	0	5	0	0	0	0
Igor Shelest	0	0	0	0	0	0	0	0	0	0	0	0	0
JFJ-Essen Volunteer	0	0	0	0	0	0	0	0	0	0	0	0	0
Others	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	6	0	1	0	0	0	0	0	5	0	0	0	0

Engagement Type

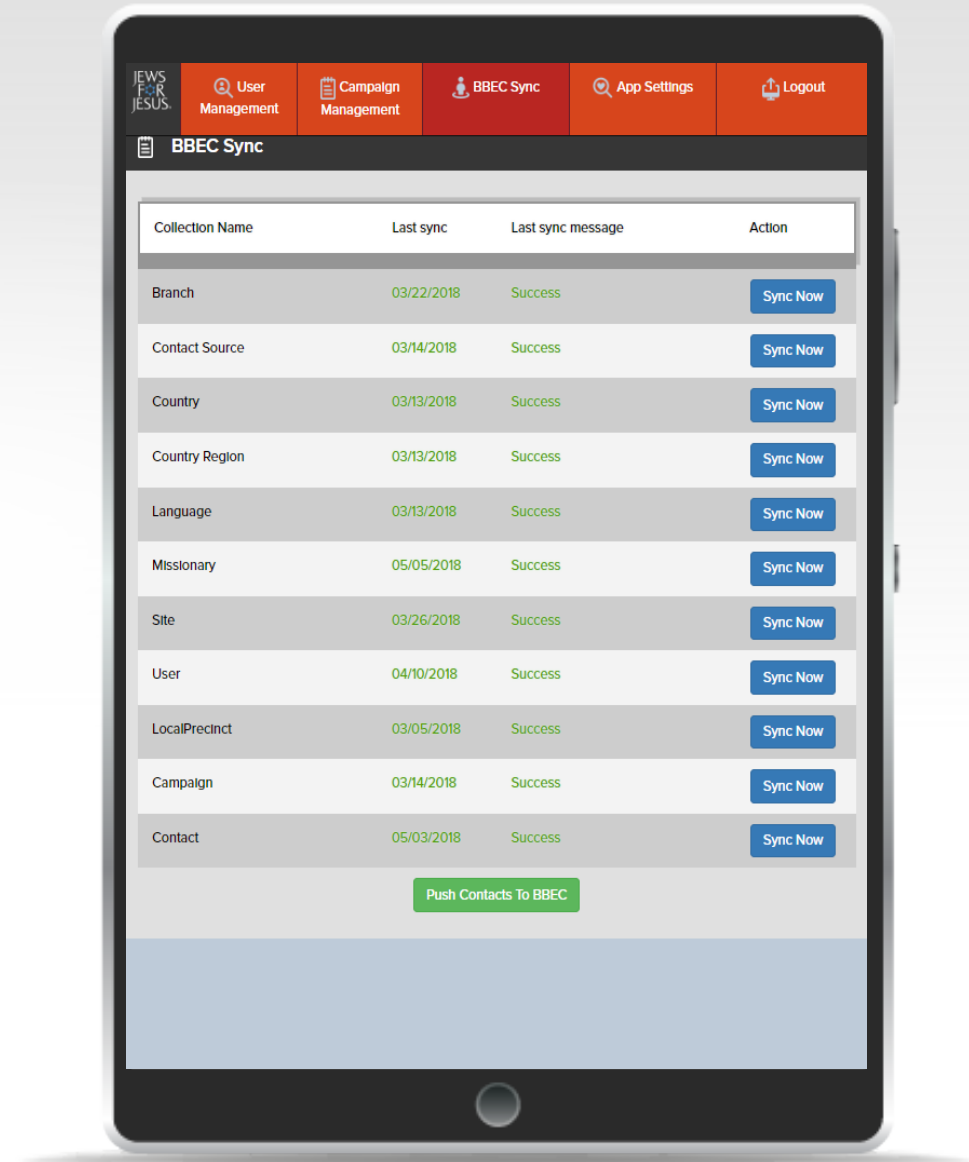
Admin section

Set user permissions

Change default sites / branches

Lock users

Confirm CRM data-list syncs



Integration: Connecting Wingman and Blackbaud CRM

- Contact adds
- Contact updates
- Duplicate handling
- Linking via shared IDs





Integration

Project Unity

Unity

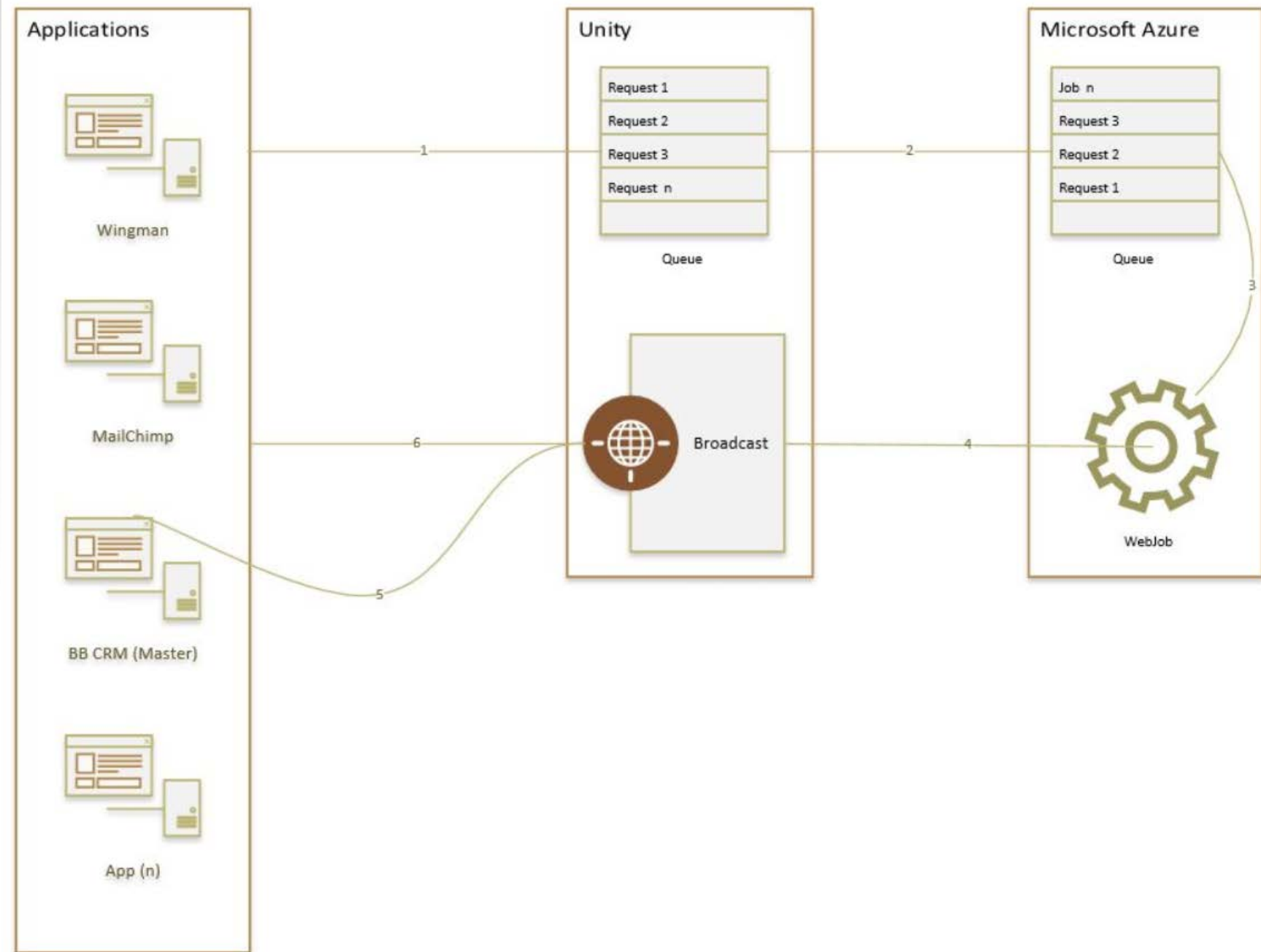
- An integration framework allowing contact inserts and updates to automatically flow between apps
- Bi-directional from 3rd party systems to / from BB CRM
- Field mapping
- Duplicate handling
- Merge function
- ID Sharing
- Potential for additional 3rd party systems

Technology Stack

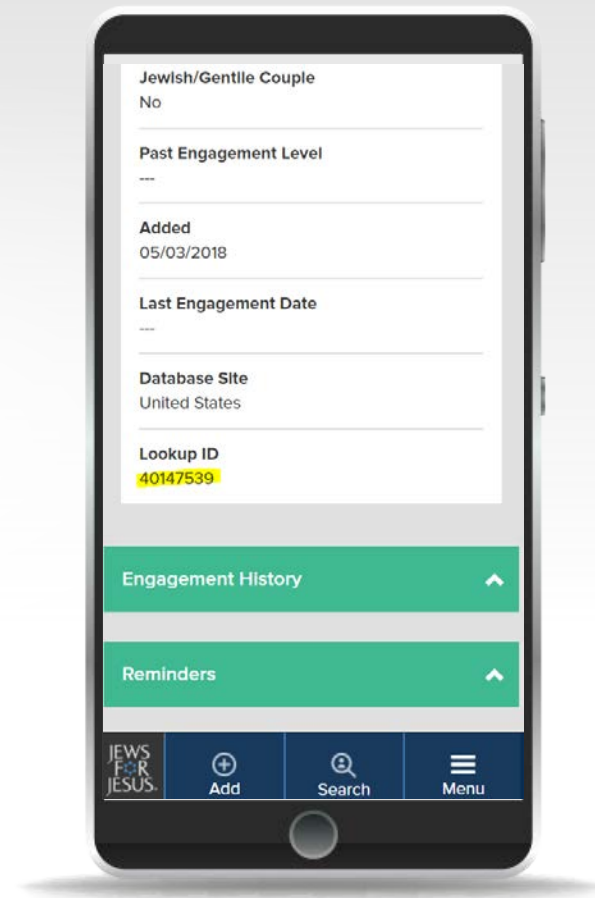
Same tools as Wingman:

- Hosting: Microsoft Azure
- Database: Microsoft Cosmos DB (NoSQL)
- Back-end: .Net Core

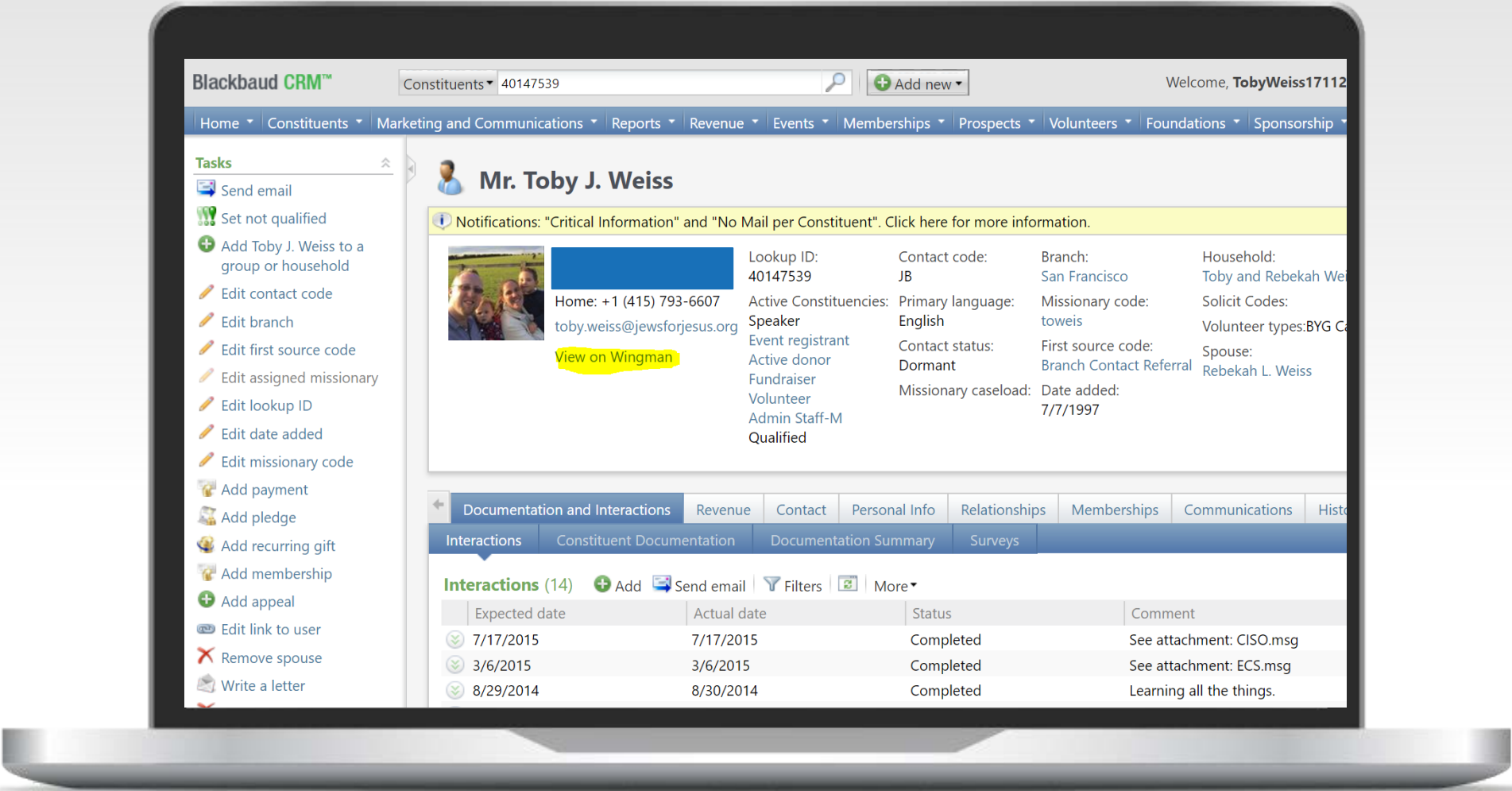
Unity design



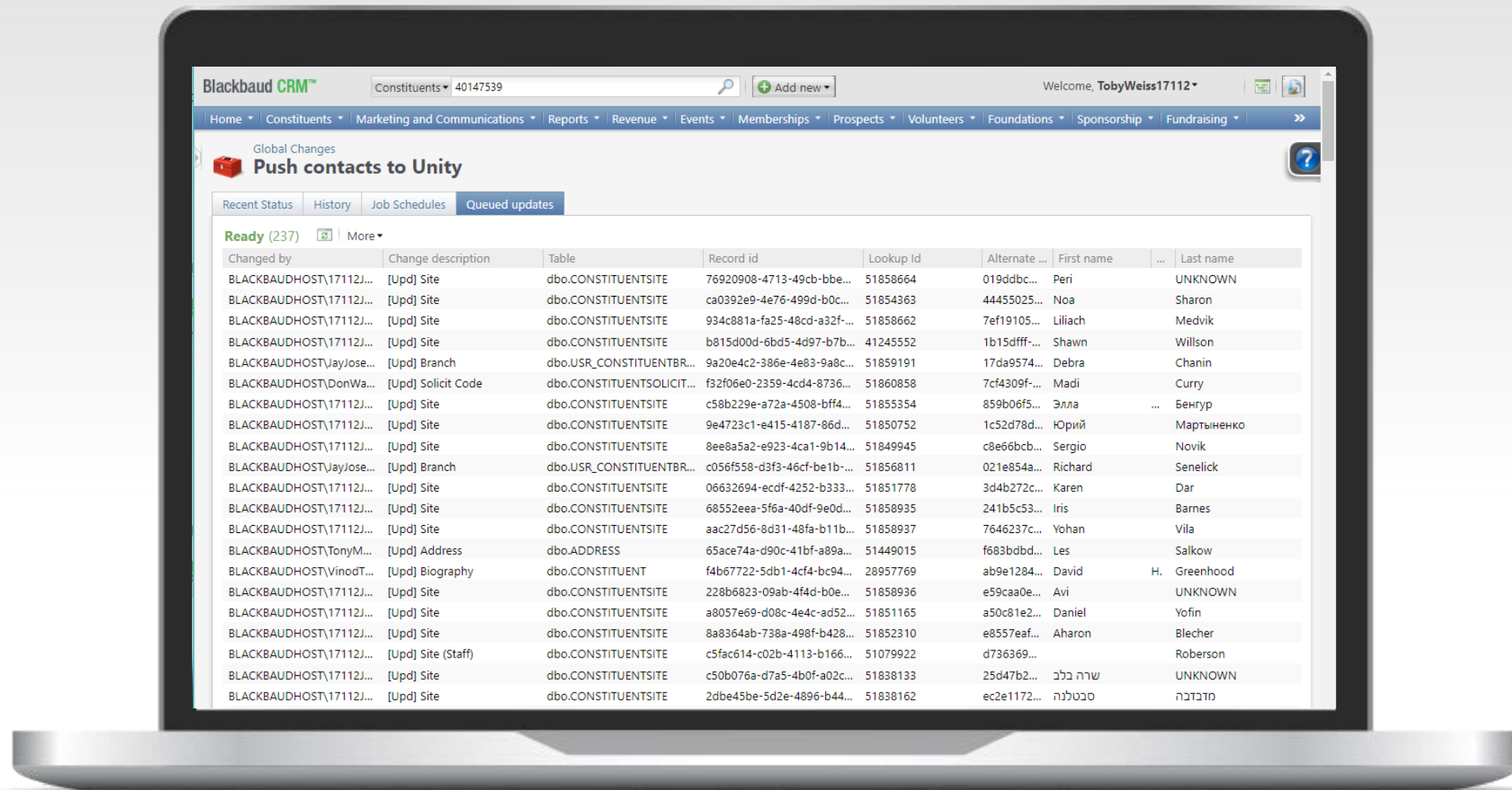
CRM ID in Wingman



Link to Wingman from BB CRM



CRM Business Process – Push to Unity



Unity

- Every contact added or updated in Wingman exists on BB CRM within seconds
- Every contact added or updated on BB CRM (meeting specified criteria) is pushed regularly to Wingman via a scheduled process as often as needed
- Logs of errors for simple resolution



Stats so far



Conclusions

Careful training with articles + videos enabled fast adoption

Off-shore team enabled fast and affordable development

Excited to see if this technology could also serve other non-profits



Conclusions

Please contact me if you feel a similar app or integration could benefit your organization

The off-shore team is available to bring this knowledge and technology, customized for you



Contact me



info@weiss1.tech



@tobyweiss



linkedin.com/in/toby-weiss

➤ Make sure to use #bbcon!



Thank you!