



Data Management

Client: Creative Action

Team Name: The Electric Factory
By Eric Lin, Juwon Lee, Cole Collins, Mason Hendry, Hongmo Ku



Meet the Electric Factory



Eric Lin,
Project Manager



Juwon Lee,
Developer



Mason Hendry,
Developer



Cole Collins,
Business Analyst



Harrison Ku,
Business Analyst

|Agenda|

- **About Creative Action**
- Data Challenges
- Our Approach
- Challenges & Decisions
- Project Retrospective

Creative Action uses the arts as a medium to inspire creativity, unlock potential, and transform the lives of students of all ages through a variety of extracurricular activities

DREAM BIG

We believe that the world needs artists, and that we can all benefit from thinking like artists; creativity, resourcefulness, and imagination are critical life skills. We inspire our community and participants to dream big and use their creativity to improve their own lives and the world around them. Our team isn't afraid of big, bold, outside-of-the-box ideas that work towards enacting our mission. No problem is too large for us to tackle!

CREATE COMMUNITY

We are a safe and supportive organization that actively welcomes all people to be a part of our community. We seek and sustain a diverse collection of collaborators to partner with us to achieve our mission and make positive change in our community. We support our staff and artists, providing them with fair pay and access to continued learning and growth opportunities. We believe that all people have something to learn from one another, and that a diverse world is a stronger one.

STAND UP

We courageously stand up against all injustice, oppression, and hate through the way we build our company culture, support our staff, manage our business, and educate the youth and families we serve. We believe in, and actively work towards, equity, justice, and love.

STRIVE FOR EXCELLENCE

We are committed to having the most effective, high-quality educational programs, and the most efficient, well-organized business. We are dedicated to investing the time and resources necessary to achieve excellence, and will settle for nothing less.

HAVE FUN

We have fun in every aspect of our work, from the way we collaborate as a team, to the way we engage the community, to the way we educate youth. We believe that life is too short to not enjoy it, and that spreading joy and love is a necessity as we work towards building positive change.



Our Stakeholders @ Creative Action



CHRISTA BERRY

Chief Marketing &
Communications Officer



MICHELLE MEZA

Development Coordinator



STEPHEN BELYEU

IT and Data Manager



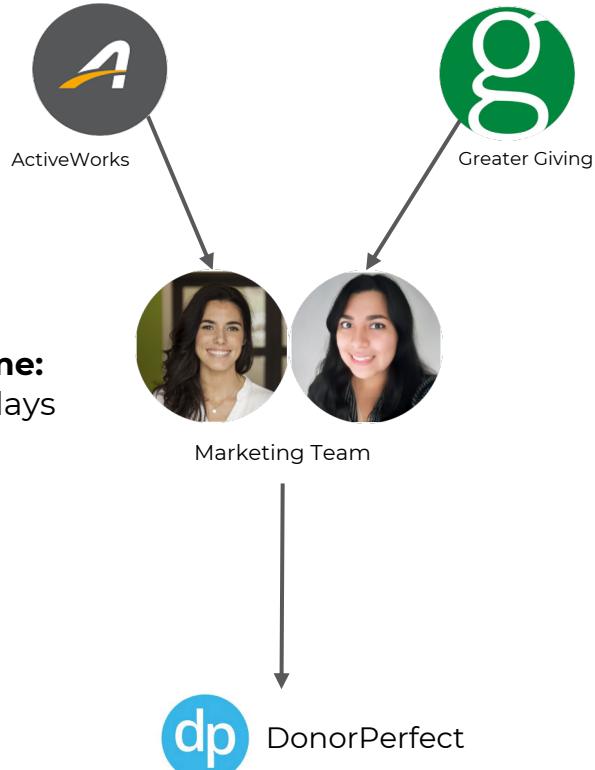
ROBYN BURCHFIEL

Chief Development Officer

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Data redundancy and **lack of system integrations** led to inefficient procedures for simple activities, like email campaigns



Edit Invalid Records	
Error_Detail	_importable_id
The field (country val= USA) contain(s) an invalid value. Check Code Maintenance to see if that value exists	-6
The field (country val= United States) contain(s) an invalid value. Check Code Maintenance to see if that value exists	-8
The field (country val= USA) contain(s) an invalid value. Check Code Maintenance to see if that value exists	-13
dp.last_name required.	-48
The field (state val= TEXAS) contain(s) an invalid value. Check Code Maintenance to see if that value exists	-88
The field (state val= TEXAS) contain(s) an invalid value. Check Code Maintenance to see if that value exists	-105
The field (state val= TX 78613) contain(s) an invalid value. Check Code Maintenance to see if that value exists	-123
The field (state val= TX 75206) contain(s) an invalid value. Check Code Maintenance to see if that value exists	-165
The field (state val= TA) contain(s) an invalid value. Check Code Maintenance to see if that value exists	-179

Strict import rules prevented the marketing team from directly importing data from ActiveWorks and Greater Giving into DonorPerfect

Certain fields of data cannot be imported unless it matches drop down menus in DonorPerfect. These fields must **match casing, spacing, and abbreviations.**

	Valid Example	Invalid Example(s)	Data Input Type	Misininput Result
School Names	TRAVISHEIGHTS	Travis Heights Elementary, Travis Heights, TravisHeights,	Dropdown Matching	Cannot input row
State	TX	Texas, texas, tx, TEXAS	Dropdown Matching	Cannot input row
City	Austin	austin	Input Field	Redundant Data Created
Address	Street	St., Str., st	Input Field	Redundant Data Created
FA Flag	X	x, "yes", FA, \$100, N/A	Boolean	Field excluded from import

Export formats did not match import **standardization requirements**

DonorPerfect

first_name
last_name
EMAIL
address
address2
city
state
zip
home_phone
cell_phone
EMPLOYER
BIRTHDATE
FLAG
SCHOOLNAME

confidential

confidential



Address Abbreviations:

- St. -> Street
 - Ave -> Avenue
 - Dr -> Drive

Phone:

(xxx) XXX-XXXX



Constant Contact imports fields into ***separate column*** names due to incorrect custom field mapping system

DonorPerfect Integration Settings

The screenshot shows the 'Constant Contact Integration Settings' page in DonorPerfect. It lists 10 custom fields from DonorPerfect, each mapped to a Constant Contact field type (Code or Description). The fields are:

Field	Type	Format
1 Average Gift Amount	<input type="radio"/> Code <input checked="" type="radio"/> Description	
2 Calendar Year-to-Date	<input type="radio"/> Code <input checked="" type="radio"/> Description	
3 Child's School	<input type="radio"/> Code <input checked="" type="radio"/> Description	
4 Flags	<input checked="" type="radio"/> Code <input type="radio"/> Description	
5 Last Gift Date	<input type="radio"/> Code <input checked="" type="radio"/> Description	
6 Last Gift Amount	<input type="radio"/> Code <input checked="" type="radio"/> Description	
7 Salutation	<input checked="" type="radio"/> Code <input type="radio"/> Description	
8 DS Rating	<input type="radio"/> Code <input checked="" type="radio"/> Description	
9 (Field Not Mapped)	<input type="radio"/> Code <input checked="" type="radio"/> Description	
10 (Field Not Mapped)	<input checked="" type="radio"/> Code <input type="radio"/> Description	

Constant Contact Import Fields

The screenshot shows the 'Custom fields' list in Constant Contact. The fields are listed with separate column names ('Custom field name', 'Field type', 'Date updated'). The fields are:

Custom field name	Field type	Date updated
Average Gift Amount	Text	Nov 19, 2021
Calendar Year-to-Date	Text	Nov 19, 2021
Child's School	Text	Jan 7, 2020
custom_field_1	Text	Nov 20, 2021
custom_field_15	Text	Nov 20, 2021
custom_field_2	Text	Nov 20, 2021
custom_field_3	Text	Nov 20, 2021
custom_field_4	Text	Nov 20, 2021

Custom Field 1:
Average Gift Amount

custom_field_1

Average Gift
Amount

Our Objectives

1. To improve the efficiency of transferring data from ActiveWorks and Greater Giving into DonorPerfect
1. To resolve automated variable mapping between DonorPerfect and ConstantContact to remove data redundancy between systems

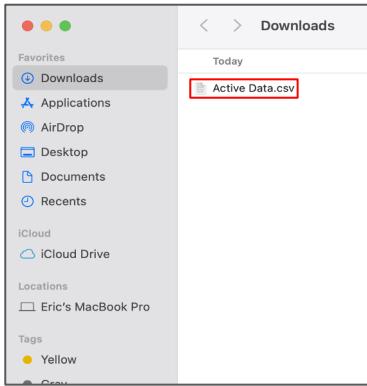
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We evaluated two options based on Creative Action's needs and pain points

	EasyCSV	Custom Solution
Standardizes Data Formats	✓	✓
Easy to Add New Templates	✓	✗
Customizable Fields	✓	✓
Ease of Use + Maintenance	9/10	7/10

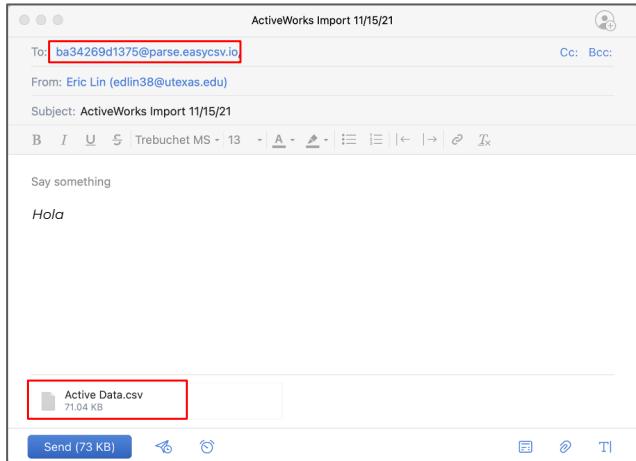
EasyCSV offers a simple user interface for processing CSV files



The ActiveWorks import interface. It has a central area for dragging and dropping CSV files, with a red box highlighting the 'Drag & drop CSV here' area. To the right, there are sections for 'Import Rules & Samples' (showing 23 optional columns and 1,000 rows allowed per import), 'Import via email' (with a placeholder 'ba342691375@parse.easycsv.io'), and various sharing options like 'Share This Page', 'Embed in your website', and 'Download Sample CSV'.



EasyCSV offers a simple user interface for processing CSV files



EasyCSV Imports

> To: Juwon Lee Cc: Eric, Hendrymason

New CSV file generated via EasyCSV import.

📎 1 Attachment - Save All

11152021export.csv
21.45 KB

We standardized formatting across phone numbers, school names, flags, and addresses

first_name	last_name	address	address2	city	state	zip	mobile	phor	home	phone	EMAIL	BIRTHDATE	Employer	childname
Hargis	Street	Austin		Austin	TX	78723	(336) 655-79	(336) 655-79				6/12/84		
Briardale	Drive	Austin		Austin	TX	78758	(405) 476-24	(405) 476-24				8/6/83		
Moreno	Street	Austin		Austin	TX	78723	(512) 963-13	(512) 963-13				12/16/82		
Moreno	Street	Austin		Austin	TX	78723	(512) 963-13	(512) 963-13				12/16/82		
Leaf	Circle	Austin		Austin	TX	78759	(512) 350-83	(512) 350-83				12/14/83		
Mueller	Boulevard	Austin		Austin	TX	78723	(512) 947-2503					11/5/76		
Mueller	Boulevard	Austin		Austin	TX	78723	(512) 947-2503					11/5/76		
Payne	Avenue	Austin		Austin	TX	78757	(512) 736-81	(512) 920-97				7/23/75		
Basford	Road	Austin		Austin	TX	78722	(737) 230-4950					2/16/79		
Vineland	Drive	Austin		Austin	TX	78722	(512) 850-9157					1/29/75		
Alford		Austin		Austin	TX	78745	(512) 923-4936					11/21/81		
Maine	Drive	Austin		Austin	TX	78758	(214) 564-1891					9/11/83		
Lawless	Street	Austin		Austin	TX	78723	(512) 496-8819					11/26/81		
Lawless	Street	Austin		Austin	TX	78723	(512) 496-8819					11/26/81		
Lenora	-	Austin		Austin	TX	78745	(512) 589-4581					12/6/82		
Lenora	-	Austin		Austin	TX	78745	(512) 589-4581					12/6/82		
2 Univise	Circle	Del Valle		Austin	TX	78617	(512) 965-79	(512) 965-79				4/10/77		
Canterbury	Street	Austin		Austin	TX	78702	(512) 426-91	(512) 426-91				2/14/78		
Norwood	Hill Road	Austin		Austin	TX	78723	(646) 220-76	(646) 220-76				1/1/80		
Stevens	Cove	Austin		Austin	TX	78723	(512) 629-25	(512) 629-25				2/12/74		
East	Side	Drive		Austin	TX	78704	(512) 560-66	(512) 560-66				10/14/75		
East	Side	Drive		Austin	TX	78704	(512) 560-66	(512) 560-66				10/14/75		
Norwood	Hill Road	Austin		Austin	TX	78723	(646) 220-76	(646) 220-76				1/1/80		
E Oltor	Apt 523	Austin		Austin	TX	78741	(210) 854-74	(210) 854-74				9/27/81		
Encino	Circle	Austin		Austin	TX	78723	(737) 202-17	(737) 202-17				2/21/78		
Brookview	Road	Austin		Austin	TX	78722	(631) 523-1608					8/10/77		
Threadgill	Street	Austin		Austin	TX	78723	(512) 299-2967					3/4/80		
Brookview	Road	Austin		Austin	TX	78722	(631) 523-1608					8/10/77		
Cherrywood	Road	Austin		Austin	TX	78722	(512) 422-45	(512) 422-45				6/30/68		
Alta	Vista	Austin		Austin	TX	78704	(512) 983-23	(512) 983-23				2/13/76		
Moreno		Austin		Austin	TX	78723	(940) 224-10	(940) 224-10				4/18/83		
Moreno		Austin		Austin	TX	78723	(940) 224-10	(940) 224-10				4/18/83		
Trail	Crest	Circle		Austin	TX	78735	(512) 739-25	(512) 739-25				6/18/77		
Ware	Road	Austin		Austin	TX	78741	(512) 585-01	(512) 444-71				3/30/74		
Trail	Crest	Circle		Austin	TX	78735	(512) 739-25	(512) 739-25				6/18/77		
Princeton	Avenue	Austin		Austin	TX	78757	(512) 694-0010					9/20/80		

confidential

confidential

confidential

CHILDSCHOOL	FLAG@AS
MAPLEWOOD	X
REILLY	X
MAPLEWOOD	X
MAPLEWOOD	X
REILLY	X
MAPLEWOOD	X
MAPLEWOOD	X
REILLY	X
MAPLEWOOD	X
MAPLEWOOD	X
CUNNINGHAM	X
MAPLEWOOD	X
MAPLEWOOD	X
MAPLEWOOD	X
CUNNINGHAM	X
CUNNINGHAM	X
TRAVISHEIGHTS	X
TRAVISHEIGHTS	X
MAPLEWOOD	X
REILLY	X
TRAVISHEIGHTS	X
TRAVISHEIGHTS	X
MAPLEWOOD	X
MAPLEWOOD	X
REILLY	X
MAPLEWOOD	X
TRAVISHEIGHTS	X
REILLY	X
REILLY	X
TRAVISHEIGHTS	X
TRAVISHEIGHTS	X
TRAVISHEIGHTS	X
BRENTWOOD	X



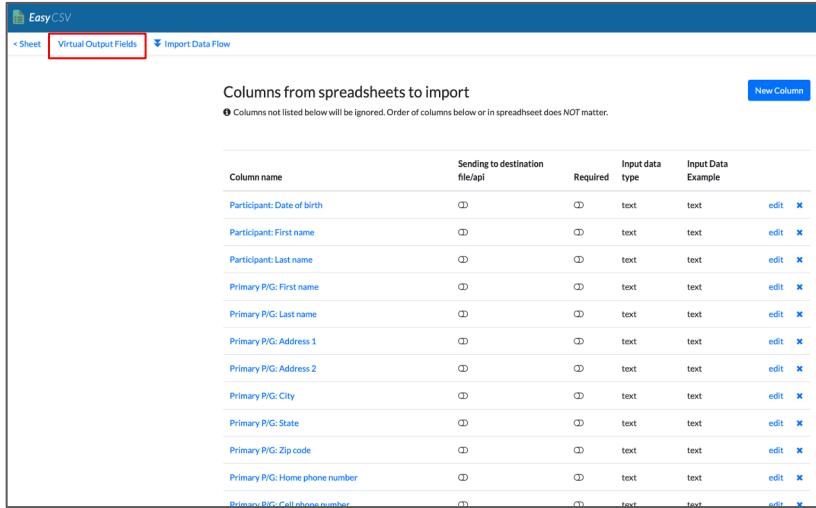
EasyCSV offers versatile functions to suit our client's needs

The screenshot shows the ActiveWorks CSV import interface. It features a large input area with a 'CSV' file icon and a 'Drag & drop CSV here' placeholder. Below this are two buttons: 'No file chosen' and 'Choose file from computer'. To the right, there's a section titled 'Import Rules & Samples' containing a red-highlighted button '23 optional columns [+]' and a note about 1,000 rows allowed per import. Further down are links for 'Share This Page', 'Embed in your website', and 'Download Sample CSV'.

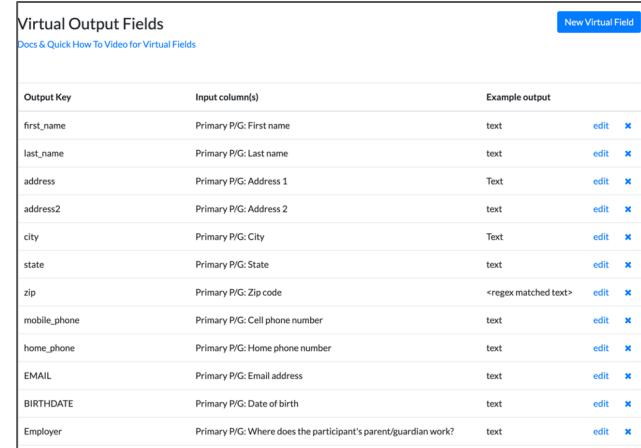
The screenshot shows the EasyCSV configuration interface. The top navigation bar includes 'Sheet', 'Virtual Output Fields', and 'Import Data Flow'. The main area is titled 'Columns from spreadsheets to import' with a note that unlisted columns will be ignored. A table lists various columns with their destination, required status, input type, and editability:

Column name	Sending to destination file/api	Required	Input data type	Input Data Example
Participant: Date of birth	<input type="checkbox"/>	<input type="checkbox"/>	text	text
Participant: First name	<input type="checkbox"/>	<input type="checkbox"/>	text	edit
Participant: Last name	<input type="checkbox"/>	<input type="checkbox"/>	text	edit
Primary P/G: First name	<input type="checkbox"/>	<input type="checkbox"/>	text	text
Primary P/G: Last name	<input type="checkbox"/>	<input type="checkbox"/>	text	edit
Primary P/G: Address 1	<input type="checkbox"/>	<input type="checkbox"/>	text	edit
Primary P/G: Address 2	<input type="checkbox"/>	<input type="checkbox"/>	text	edit
Primary P/G: City	<input type="checkbox"/>	<input type="checkbox"/>	text	edit
Primary P/G: State	<input type="checkbox"/>	<input type="checkbox"/>	text	edit
Primary P/G: Zip code	<input type="checkbox"/>	<input type="checkbox"/>	text	edit
Primary P/G: Home phone number	<input type="checkbox"/>	<input type="checkbox"/>	text	text
Primary P/G: Cell phone number	<input type="checkbox"/>	<input type="checkbox"/>	text	edit

EasyCSV offers versatile functions to suit our client's needs



The screenshot shows the EasyCSV interface with the 'Virtual Output Fields' tab highlighted by a red box. The main area displays a table titled 'Columns from spreadsheets to import'. The table has columns for 'Column name', 'Sending to destination file/api', 'Required', 'Input data type', and 'Input Data Example'. A note at the top states: 'Columns not listed below will be ignored. Order of columns below or in spreadsheet does NOT matter.' A 'New Column' button is located in the top right corner of the table area.



The screenshot shows a table titled 'Virtual Output Fields' with a 'Docs & Quick How To Video for Virtual Fields' link above it. The table has three columns: 'Output Key', 'Input column(s)', and 'Example output'. It lists various fields such as first_name, last_name, address, address2, city, state, zip, mobile_phone, home_phone, EMAIL, BIRTHDATE, and Employer, each with its corresponding input source and example output format.

Output Key	Input column(s)	Example output
first_name	Primary P/G: First name	text edit ✖
last_name	Primary P/G: Last name	text edit ✖
address	Primary P/G: Address 1	Text edit ✖
address2	Primary P/G: Address 2	text edit ✖
city	Primary P/G: City	Text edit ✖
state	Primary P/G: State	text edit ✖
zip	Primary P/G: Zip code	<regex matched text> edit ✖
mobile_phone	Primary P/G: Cell phone number	text edit ✖
home_phone	Primary P/G: Home phone number	text edit ✖
EMAIL	Primary P/G: Email address	text edit ✖
BIRTHDATE	Primary P/G: Date of birth	text edit ✖
Employer	Primary P/G: Where does the participant's parent/guardian work?	text edit ✖

EasyCSV offers versatile functions to suit our client's needs

Virtual Output Fields
Docs & Quick How To Video for Virtual Fields

Output Key	Input column(s)	Example output
first_name	Primary P/G: First name	text edit x
last_name	Primary P/G: Last name	text edit x
address	Primary P/G: Address 1	Text edit x
address2	Primary P/G: Address 2	text edit x
city	Primary P/G: City	Text edit x
state	Primary P/G: State	text edit x
zip	Primary P/G: Zip code	<regex matched text> edit x
mobile_phone	Primary P/G: Cell phone number	text edit x
home_phone	Primary P/G: Home phone number	text edit x
EMAIL	Primary P/G: Email address	text edit x
BIRTHDATE	Primary P/G: Date of birth	text edit x
Employer	Primary P/G: Where does the participant's parent/guardian work?	text edit x



New output field key
`first_name`

Output File Column Order (1 = first column, 2 = second column, etc...)
1

Combine / Transform Value(s) [Static Value](#) [If value is ___ then change to ___ \(CASE\)](#) [Equation \(IF, SUM, MATH, ROUND, etc.\)](#)

Spreadsheet column(s) to use (up to 5 allowed)
Spreadsheet Column / Import Field Name [Perform action on column value - Help docs](#) [Extra Info](#)

Primary P/G: First name (text) [Value of columns/field](#)

+ Add another spreadsheet column / Import field

Default Value (optional - if the column values can't be parsed, result in an error, or is empty)

Hash the final value (Advanced)

[Save](#) or [cancel](#)

Renaming Column Only

Combining Functions

New output field key
`CHILDSCHOOL`

Output File Column Order (1 = first column, 2 = second column, etc...)
13

Combine / Transform Value(s) [Static Value](#) [If value is ___ then change to ___ \(CASE\)](#) [Equation \(IF, SUM, MATH, ROUND, etc.\)](#)

If this then that cases (up to 10 allowed)
Note: You only need to add rules for the values you want to swap. By default, EasyCSV will pass the value as-is if no case is set up.

if
 Season name (text)

Condition [Old Value](#) [How to check if old value is blank / empty?](#) [New Output Value](#) [How to use another col or virtual field?](#)

Includes after school → [CHILDSCHOOL_HELPER(exclude)]

ELSE (optional - will use existing field value by default) [\(BLANK\)](#)

+ Add another case

[Save](#) or [cancel](#)

Applying RegEx Function

New output field key
`zip`

Output File Column Order (1 = first column, 2 = second column, etc...)
7

Combine / Transform Value(s) [Static Value](#) [If value is ___ then change to ___ \(CASE\)](#) [Equation \(IF, SUM, MATH, ROUND, etc.\)](#)

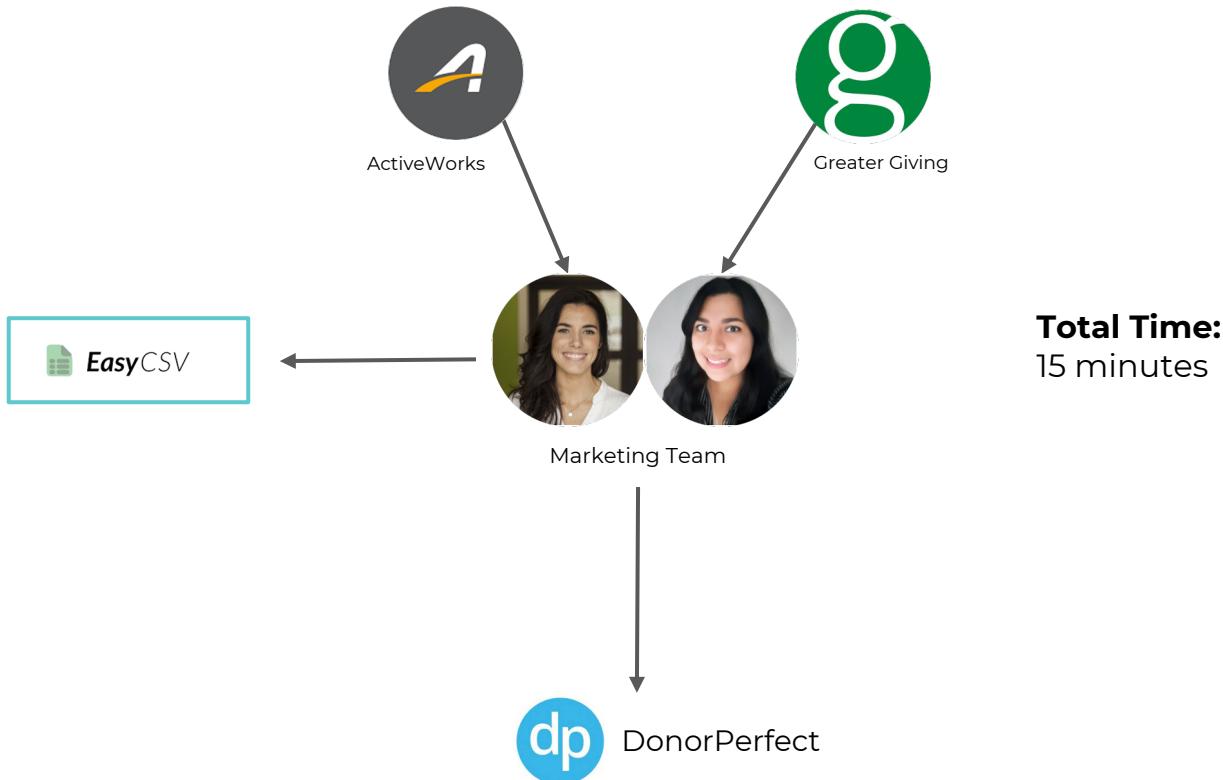
Spreadsheet column(s) to use (up to 5 allowed)
Spreadsheet Column / Import Field Name [Perform action on column value - Help docs](#) [Extra Info](#)

Primary P/G: Zip code (text) [Extract text with a Regular Expression \(regex\)](#) [RegEx Examples](#) [Help doc](#)

+ Add another spreadsheet column / Import field

value (Advanced)
`^(\w{5})(\d{4})`

By adding an intermediary step, the data no longer requires manual editing to reach DonorPerfect



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Project Challenges & Decisions

	Challenges Faced	Our Solutions
 Culture	<ul style="list-style-type: none">• Stephen did not have an IT background• Users did not want to learn a new software	<ul style="list-style-type: none">• We chose EasyCSV as a no-code, middleware solution• It does not interfere with their workflow
 Scheduling	<ul style="list-style-type: none">• Client was slow to share testing data• Uncertainty on how the final output should look	<ul style="list-style-type: none">• Scheduled expected buffer times during sprint planning• Worked on other tasks while waiting on our client to deliver data sets
 Technology	<ul style="list-style-type: none">• EasyCSV did not have a pre-packaged answer to every formatting issue• We were unsure of how some EasyCSV functions worked	<ul style="list-style-type: none">• Contacted Max, the CEO of EasyCSV to help us understand the functions and explore workarounds for our use cases
 Scope	<ul style="list-style-type: none">• We had extra time leftover after completing the primary objectives• The final sprint was not a large value-add	<ul style="list-style-type: none">• Pivoted our final sprint to focus on Constant Contact• Used extra time for quality assurance and additional training

We reached out to Max from EasyCSV!



Max also IT consulted with a local nonprofit in college!

- 1 Learned how certain functions worked
- 2 Explored other uses for EasyCSV
- 3 Plan to connect Stephen with Max for future questions
- 4 Made a fun connection along the way

Finishing core functionality early gave us room to expand the project scope and explore other client pain points, specifically data tagging within DonorPerfect

The diagram illustrates the mapping of Constant Contact custom fields to DonorPerfect custom fields. On the left, the 'Custom Fields Mapping' screen shows a list of fields and their mappings. On the right, a 'Contact Details' screen shows the resulting data in DonorPerfect.

Constant Contact Video Tutorial

Campaign/List Management

Account Custom Fields Mapping Sync Settings

When donors are part of a Dynamic Filtered list, Custom Fields for those custom fields are updated only once, when the donor is added to the list.

Field	Type ?	Format ?
1	Average Gift Amount	<input checked="" type="radio"/> Code <input type="radio"/> Description
2	Calendar Year-to-Date	<input checked="" type="radio"/> Code <input type="radio"/> Description
3	Flags	<input checked="" type="radio"/> Code <input type="radio"/> Description
4	Last Gift Date	<input checked="" type="radio"/> Code <input type="radio"/> Description
5	Last Gift Amount	<input checked="" type="radio"/> Code <input type="radio"/> Description
6	DS Rating	<input type="radio"/> Code <input checked="" type="radio"/> Description
7	Donor Interests	<input type="radio"/> Code <input checked="" type="radio"/> Description
8	Cultivation Status	<input type="radio"/> Code <input checked="" type="radio"/> Description
9	(Field Not Mapped)	<input checked="" type="radio"/> Code <input type="radio"/> Description
10	(Field Not Mapped)	<input checked="" type="radio"/> Code <input type="radio"/> Description

Contact Details

Confidential
Subscribed • Implied Added by API on Aug 5, 2019 • Edited 14 hr. ago

Details Engagement Notes (0)

Custom Fields

Child's School
Blanton Elementary - After School Program

custom_field_1
3252.00

custom_field_2
15000.00

custom_field_4
ASFAMILY,BOARD,DONOR,EVENT

custom_field_5
05/31/2021

Save

Diagram description: The mapping table shows 10 rows. Rows 1 through 5 have the 'Description' radio button selected. Rows 6 through 10 have the 'Code' radio button selected. Arrows point from each row to its corresponding mapped field in the DonorPerfect contact details. For example, 'Average Gift Amount' maps to 'custom_field_1', 'Last Gift Amount' maps to 'custom_field_2', and so on.

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Looking back, what went well?

Our Decisions



Weighed all the options before choosing EasyCSV and evaluated all options fairly without getting tied toward any solution



Frequent communication via standing client meetings on Monday/Friday and team meetings on Tuesday/Thursday



Conducted testing for every step of development and performed demos every meeting

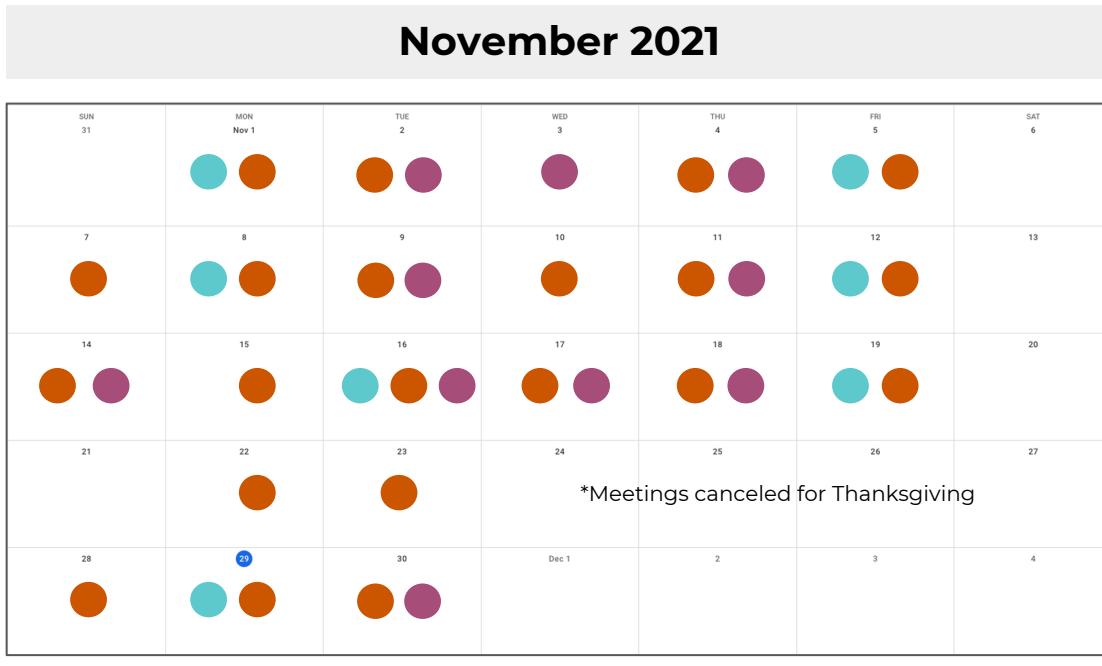
The Impact

EasyCSV can be applied across other Creative Action departments

Client team always knew what we were doing and had clear expectations for the final solution

Never had serious bugs in development and trained our client on the system throughout the development process

We learned that **short but frequent communication** were more efficient. Equally important was building a **casual rapport** with the Creative Action team



Key:

- Met with at least 1 member of Creative Action
- Sent a Slack to and/or received a Slack from a member of Creative Action
- The Electric Factory team meetings

Conversation Style:

Cool,
thanks!
Will do

Thank you, Ms. Berry,
we have taken notice
of your concerns and
will address these
issues at our earliest
convenience given
current constraints

Test the EasyCSV system **frequently** to identify potential problems and fix early, and inform the client of any changes **good or bad**

The Electric Factory

- Share progress daily rather than at weekly meetings
- Conduct tests after every change to identify errors and verify the changes work

Creative Action

- Review progress and verify output matches requirements
- Reevaluate system requirements based on functions available

EasyCSV System Testing Log

ID	Importer	Name	Result	Time to import
1637270022	juwon.lee	Greater Giving 1.csv	● 56 / 56 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636944703	juwon.lee	Greater Giving 1.csv	● 56 / 56 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636936675	juwon.lee	Greater Giving 1.csv	● 185 / 185 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636935364	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636738925	juwon.lee	Greater Giving 1.csv	● 185 / 185 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636553527	juwon.lee	Greater Giving 1.csv	● 185 / 185 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636483757	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636446132	juwon.lee	greatergiving-unit-test..	● 6 / 6 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636332378	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636000851	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636005735	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute
163600570	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636005396	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636005513	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636005338	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636000158	juwon.lee	GG sample data.csv	✗ 0 / 723 Import failed for an unknown reason. Please contact support@easycsv.io.	less than a minute
1636005007	juwon.lee	GG sample data.csv	✗ 0 / 723 Import failed for an unknown reason. Please contact support@easycsv.io.	less than a minute
1636049453	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636000198	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute
1636001566	juwon.lee	GG sample data.csv	● 723 / 723 Import successfully generated a new CSV file that was sent via email.	less than a minute

What should we do next time to improve?

We should:

Invite Stephen to more planning-stage discussions

Better determine the value of each user story during planning

Get examples of clean data from client early in development

Have BA's work closer with the Developers

To/Because:

- Gather client input throughout the development process
- Learn the new technology alongside the consulting team
- Avoid re-evaluating sprints later in the project
- Don't waste the client's time and resources
- Save us time when we reach the testing phase
- We knew what the output needed to be from our planning interactions
- BA's got lost early on and did not fully understand the system
- Prevent future internal communication barriers and align objectives

Maximize client satisfaction

Questions?

