Database Development

This document will serve as our primary location for keeping notes on the Database and anything we think it should include or anyway we think it should function. KB will write the initial draft (using black font). When you add new material simply write it in your color below. If I incorporate it right away I will change it to black. If there are further questions I will leave it in color and comment.

Kristin = Purple
Peggy = Green
Rosy = Blue
Dustin = Orange
Items for us "To Do" = red
Follow up notes from discussions = highlighted in yellow

Discussion:
Guidelines for those who want to create a profile. Integrated into development
Do everybody who get to the site "faculty opportunities" can create a profile? or only those experts we consider could add value to the data base? Integrated into development
How are we going to now how many profiles were created per day? Integrated into development
beside the synopsis should we ask them in another box only for the main topics they touch in the book? We want to make the data entry not to exhaustive or they may become exhausted.
Somewhere, should we ask them about the countries they have work in? or about the countries they wouldn't be interested on accept a job? We want to make the data entry not to exhaustive or they may become exhausted.

Database Development for Faculty Opportunities brought to you by Capstone International

*****Please note that the following color code will be implemented for what we need now, next, and in the future. In other words, red means we have to have this or the database is not operational, yellow means that this is secondary but we would really like it, and green means this will make this database amazing and profitable.

OVERALL development and changes

1. Remove all the : after each field name_____
2. Match site look to company brand or vice versa
3. We would like all the instructions to be consistent and pop-up boxes as not to be confusing. We have provided text for most but brevity is the best and large font size!
4. We need a place to write the fine print and disclosures about the use of their data. Most of the information will be in the directions and text associated with fields, but having it all in one place like an agreement when you are downloading an application would be great. It also needs to include information on future programs that they may engage in when they get the opportunity through one of our opportunities. I think that they need to know in advance that they will be required to pass on those opportunities to us to develop. In addition, we can inform them that they can send opportunities to them to manage for them.
5. All lists should be in multiple columns them appear easier to complete
6. All lists should be in alpha order with "Other" at the bottom and a field to fill in the other (do not limit the length of text beyond several sentences.
7. All dates need only be MM/YYYY

EXPERT USER INTERFACE development and changes

I. Changes to home page

A. *Simple changes*: Please make the following changes in text, presentation, or placement. We will refer to this interface as the "Home Page" interface.

1.	Where:	Black Bar within Welcome
	What:	Extend black bar to end of yellow box
	Change:	Center Welcome text above boxes underneath
2.	Where:	Yellow box
	What:	Delete Create a Profile
	Change to:	Create an account
3.	Where:	Bottom black bar, left side Contact Us
	What:	Delete current email, create info@facultyopportunities.com email
	Change:	Route users to this email

4. Where: our mission
What: text
Change to: Faculty Opportunities is your gateway to educating executives across the globe. We aim to connect you, the expert, to world class Universities, high-end Seminar Producers, Government agencies, and Corporate clients. Faculty Opportunities was developed by Capstone International, a global Executive Education Expert sourcing and Education Program Resources company. The Faculty Opportunities Database allows Capstone the ability quickly identify and match top qualified members of our database to our Clients. We strive to create lasting relationships between educator, client, and students together to connect, excel, and grow today and tomorrow. Welcome to your Faculty Opportunities experience, please create an account.

5. Where: Below Blue current opportunities box
What: add 5 more yellow boxes, similar to create a profile, with links
Add link: Use the following set-up

Where do these link to? Are these a set of features I need to add, or are they links to the CI website? These will be links to our website and the links will go to different areas of the website. I will give them to our web designers.

6. Where: our mission
What: add link within above text
Add link: to Capstone International website

7. Where: Hmmmm not sure yet
What: add Capstone International's Logo to the site with link
Add link: to Capstone International website

8. Where: Top right
What: sign up
Change to: create an account

9. Where: Bottom left
What: sign in
Change to: log-in

II. Changes to the "Create a Profile" which will become "Create an Account" Interface

A. *Simple changes*: Please make the following changes in text, presentation, or placement. We will refer to this interface as the "Create an Account" interface.

1. Where: Above the black bar
   What: Please add the following text:

"***Welcome!*** We are pleased you have chosen to ***submit your information*** to Faculty Opportunities brought to you by Capstone International (should have live link to our website). If selected, you become part of our family of elite Experts and we become your gateway to teaching the world. Our Instructors, Speakers, and Consultants teach the brightest up and coming global executives in an amazing variety of fields. As one of our Experts, you will receive international program opportunities from our network of universities, international seminar producers, and corporate clients. Opportunities include international immersion programs, seminars, multi or single topic on-campus or in-house programs, keynotes, consulting, coaching opportunities and more.

We continually monitor our Expert database to maintain the ***highest quality of available Instructors, Speakers, and Consultants***. We only select the best and brightest. Currently, we work almost exclusively with Experts who have received their Masters or Doctorate degrees and have extensive teaching and consulting experience. ***"Expert" beyond the degree, usually means*** that you have experience such as teaching at a University for at least 5 years at the graduate level preferably in an EMBA program or with Executive Education programs, have published a business book, have extensive experience teaching outside a university for corporate clients, or have a substantial consulting practice.

Because we select the highest caliber, please ***submit a professional promotional bio.*** Also, include phone numbers and emails for ***3-5 references*** who have seen you present or experienced your expertise as a consulting client. Once your material is reviewed, and if selected, we will send you a confirmation code to create your account, fill in your profile, upload important documents, and begin receiving potential global opportunities. Our review and selection process usually takes 10-14 business days. From all of us at Capstone International, we appreciate your interest and look forward to working with you in the future!"

2. Where: The black bar text
   What: change the text "Edit Your Profile"
   Change To: "Create Your Account"

3. Where: Under black bar text
   What: delete text "Enter or update your information to start receiving information about upcoming projects. "

4. Where: Within blue box
   What: change order of fields

Change To: First Name
Last Name
Email
Website

5. Where: Within blue box, below #4
What: add field called "Professional Promo-bio" with cut and paste instructions in light grey

6. Where: Within blue box, below #5
What: add a drop down menu or boxes to select multiple options what kind of applicant they are with the following text "Please select the following employment associations you are currently engaged in, so we can better review your material" and the following options:
Consulting Group Associate
Consulting Group Partner
Independent Consultant
University or College Associate
Other (*with a fill in box*)

7. Where: Within blue box, below #6
What: add boxes to paste in video link with the following text "If you have a link to a video of you teaching it always helps us with our selection. If yes, please fill in the link(s) here."

8. Where: Within blue box, below #7
What: Professional Promo-bio Suggestions button
Corresponding action: Downloads a document that provides suggestions for creating the bio.

9. Where: Within blue box
What: change "Submit Query"
Change To: "Submit"

B. ***Functionality Changes:***

1. Expert Invitation

Action within database: We have a list of people we have already vetted and want them to be invited to the database. They will receive an email with an invitation that will allow them to accept invitation and create an account or decline the invitation.

Action results: Allows us to circumvent review process and have expert go directly to entering their information and creating a profile (account)

a. Email to Current Expert List: This email goes to the people we have on our list already. This will be a one time delivery to those people if the email is correct.

Text to read:

After many years...

 Accept Invitation and Create Account
 Decline Invitation (do we would like to ask them the reason they decided to decline the invitation)

i. Accept: If an invitation is accepted the Expert is routed to III.A.
ii. Decline: If an invitation is declined we keep an basic spreadsheet with the person's name and email address as a do not contact. This email sheet should be checked whenever we send a new invitation (III.B.1.b.) to cross reference and not allow the invite to be sent.
iii. Returned email from Mailer Daemon results will appear in the account set up to send these emails.

b. Email to New Invited Experts (make new account for these people like)

Text to read:

we have researched you and would like to invite you to join our Capstone International as a faculty expert. we are capstone international and provide ......

 Accept Invitation and Create Account
 Check back with me in a month
 Decline Invitation

i. Accept: If an invitation is accepted the Expert is routed to III.A.
ii. Check back: If an invitee wants us to check back, we keep a basic spreadsheet with the person's name and email address. The database will remind us to resend invitation. We could have different text. Remind me to write it when you get to this.
iii. Decline: If an invitation is declined we keep a basic spreadsheet with the person's name and email address as a do not contact. This email sheet should be checked whenever we send a new invitation (III.B.1.b.) to cross reference and not allow the invite to be sent. Is there a way to have them tell us why they are declining?
iv. Returned email from Mailer Daemon results in a notification to us to re-enter the email and resend. This should appear in the admin user interface and we should be able to get to it later.

2. Expert Screening

Action within database: A potential Expert goes to our site via Capstone Int., is referred to, or finds our website. If they decide to be a part of the database the potential expert then clicks on the "create a profile" button and they are taken to the "Create an Account" interface. This page welcomes them and allows them to "Apply" to be a part of the database. There they fill in their name, email, and have a field to paste their promotional bio. The database sends an email with their information and gives us an opportunity to screen their qualifications.

Action results: Keeps the database from being hacked and ensures the quality of the experts within the database

a. Received Application Email: This should be sent to a new account preferably called applications@facultyopportunities.com that we can forward to whomever has the time to review them.

Text to read:

APPLICATION # *(please note that the database should tell us what number it is so we can keep track of our application rates per month and per year)*

First Name: *as seen in Create an Account interface*
Last Name: *as seen in Create an Account interface*
Bio: *as pasted in the Professional Promo-bio field*

 Select
 Reject and maintain basic information
 Reject and delete information

Text location: Within Email sent to applications@facultyopportunities.com once the Applicant selects Submit at the bottom of the Create an Account interface.

i. Application *Selection* Email: If we click the "Select" button, then an automatic email is sent to the candidate informing them they can create a profile that will be entered into the database. They can click a link to go to the "Create a Profile" Interface at which time they will select the email and password of their choice to use at the website's login.

Text to read:

Dear "*Their name automatically inserted here by database*",

On behalf of Capstone International, ***Congratulations!*** You have been selected to become a part of the Faculty Opportunities network of Experts providing you global opportunities to teach the world! Please use the following link to your personalized portal into our Faculty Opportunities Database to begin creating your profile.

Your personal database portal: XXXX

Once at our portal please use an email account and password that is viewed and known only by you. If you are a team leader, you may wish to create a profile for the entire team or have each team member prepare a profile but all using the same e-mail address and different passwords. If you are a consulting firm team member and need to refer opportunities to your team or firm leader only, please indicate the email we should send project opportunities to in the "Create Your Profile" page.

We respect your right to privacy and do not want to inadvertently release your information to the wrong entity through a viewable email account. Please be assured that we take great care of your information and do not share it without your prior approval. Your privacy, safety, and success is of our utmost concern. Once in the database you will be able to review our commitment to you and our terms and conditions.

When creating your profile, you will be guided through with instructions and explanations. This information will provide you with much more information about us and how our database works. It will also inform you how to engage in following projects we are working on and accepting opportunities that you have been selected for as a candidate.

We are looking forward to providing you with Faculty Opportunities and working with you! Welcome you to our team!

Sincerely, Capstone International

ii. Application *Reject and maintain basic information* Email: If we click the "Reject" button, then an automatic email is sent to the candidate informing them that we will maintain their name and revisit them as their career broadens. In the future they can click a link to a document that explores what they can do to expand their resume and qualifications.

Text to read:

Dear "*Their name automatically inserted here by database*",

Thank you for sending your material to Capstone International for review. We are sorry that at this time we can not accept your qualification for selection. We do believe that you have the potential to become a part of Faculty Opportunities. We would like to maintain your basic information so we may contact you in the future as you build skills and experience in corporate work.

As tomorrow's Expert, we hope you will maintain your basic data and update us frequently on your achievements. We are looking forward to to tracking your career and hope to work with you in the future!

Sincerely, Capstone International

iii. Application *Reject and delete basic information* Email: If we click the "Reject and delete information" button, then an automatic email is sent to the candidate informing them that we will did not select them. They are welcomed to come back as their career grows but their data is not saved.

Text to read:

Dear "*Their name automatically inserted here by database*",

Thank you for sending your material to Capstone International for review. We are sorry that at this time we can not accept your qualification for selection. Please feel free to check back with Capstone International's Faculty Opportunities as your experience in corporate work grows.

Sincerely, Capstone International

III. Create the "Create Your Account" Interface

A. Functional Changes:

1. Initial Database Entry of email and password

Action within database: When an Expert first goes to the database from their personalized portal email link this is where they create their Account and therefore their ability to log-in. They will also see a quick congratulations with a description of what will happen next. There will be a field to enter an email differently than the one we used to contact them and fields to set their password. Once they set this up they are immediately directed to the " Your Profile" interface (IV.A.2).

Action results: Keeps Experts from using a viewable email and informs them of where directions will be.

Text to read: ***Welcome*** and again ***congratulations*** on being selected or invited to be a part of Faculty Opportunities, brought to you by Capstone International. Please, ***select the email address*** you wish this account to be associated with and your own personalized ***password***. As you enter the data we request in the following forms ***directions*** can be found to the right of the fields in pop-up boxes. You do not need to complete the entry of your data in one sitting, instead you may come back anytime. You may also omit data if you do not have it. We hope you visit frequently and keep us informed about your changing career and experiences as each one will better reflect your qualifications and increase our ability to find the best opportunities for you. Below you can review our terms and conditions and select the agree button. Thank you!

Terms & Conditions

There will be a box to click Dustin will describe what you are going to do here.

If this box is not checked the user is referred back here

2. Second and Further Database Entry

Action within database: Bring an Expert to the "Your Profile" Interface with a ***Welcome Back!*** above the black line.

Action results: Does not re-welcome them as in the Initial database entry.

3. Reminder Pop-ups each time they come back about what fields they have yet to complete.

Action within database: Remind experts to continue with entering data and give them a specific list of what is to be filled in.

Action results: Keeps them going with data entry.

4. Completion wizard.

Action within database: Walks experts through filling in their forms.

Action results: Keeps them going with data entry.

IV. Changes to " Your Profile" interface or the summary page with their picture

A. Simple changes: Please make the following changes in text, presentation, or placement to Your Profile Page

1. Where: Black bar from left side of screen
   What: text "Your Profile"
   Change To: Please change the words to be the person's full written title
   Corresponding action: Please have a place where people can write their full written title within the "Update Your Profile" interface (V). For example, Dr. Harvey Albright, AVG, CVM II

2. Where: Black bar from left side of screen
   What: add length to black bar and add text "Update Profile" at right end within black bar in white text.

3. Where: to the right of picture
   What: remove all text
   Change To:

Expert in a, b, and c.	*With a-c corresponding to their top 3 expertises*
City, State, Country	*Without titles*
Website	*Without titles and shows up if filled in*
Current Employer	"
Authors. Year. Title. Publisher	"

   Corresponding action: Add needed fields need to be added in Update Your Profile. Also please note that the author's last name does not show up on this interface so the book looks like it is published by the co-authors instead, hence the correct bibliographic format above.

4. Where: below list in #3 above
   What: add button that says Update Profile

5. Where: To the right of the Update Profile Button
   What: add button that says What's Next
   Corresponding action: Create a new Interface called What's Next that gives instructions to Faculty for how we will move forward with their information. This button is only activated once they have a certain amount of data available for query. The list will be in the section on this interface.
   Is this going to be interactive or simply a bit of information telling them what the next step in the process is going to be? Mostly just written stuff. We may in the future develop videos for them to watch since people don't read anymore.

   Instruction pop-up: "Once you have entered enough data for us to assess your qualifications for a project, this button is activated and you will be taken to a new page with a description of how things will go next and the process through which we notify you of candidacy."

V. Changes to " Update Your Profile" or current "Edit Your Profile" interface

A. Simple Changes - *all of these are within the blue box except where noted.*

1. Where: Somewhere near the top (*This does not have to be in the blue box.)
   What: Add a "Change your email and password" box/field or make it a separate pop-up window

2. Where: First field instead of Website
   What: Change text to Full Written Name
   Instruction Pop-up: "Please write your full name with credentials here. For Example Dr. Dana Young, MD, PhD, CPA" Dont you think we need to give them the credential options? maybe the credentials should be in another box and we could do searches only by credentials.
   Corresponding Action: This name will appear in the " Your Profile" interface (IV.A.1.)

3. Where: Underneath Full written name
   What: Add check boxes for gender
   Add: ☐ Female ☐ Male

4. Where: Underneath gender
   What: Nationality dropdown box
   Instruction Pop-up: "Because of the differences in culture there often requirements that require us to have this information."

5. Where: Below "Country:"
   What: Add "Phone" field

6. Where: Website Field
   What: Move to after Phone
   Instruction Pop-up: "You may use your own consulting firm's website if you are independent. If you are receiving your opportunities because you are part of a group, please use the website of your group or firm. Please note, that if you teach other material independently you may set up another profile with that information by going directly to www.facultyopportunities.com and select "Create and Account"."

7. removed by Kristin - no need for changing picture resolution

8. Where: Below Profile Pic
What: add field called “Video” with a browse button
Corresponding Action: Provide a place for two link for their video and then they will be able to view it on our site. They should have a place for the title to go.

Instruction Pop-up: “A link would be the best option; we don’t want to host their videos as it would really affect database performance. We can embed any links they give us from YouTube, Vimeo, Viddler, and a few others; a nice side effect of this is good SEO for the FO site as well as for them.”

9. Where: Under “Current Employer”
What: Add the following text and a yes and no check box

“Is the material you teach that is associated with this profile proprietary to a larger group, company, or firm”

☐ Yes ☐ No

Instruction Pop-up: “This can be your own company, a university, a corporate group, etc. but it is the company that your material is associated with.”

10. Where: Daily Fees
What: delete all text
Change To: “Daily compensation range”

11. Where: below the drop down menu for “Daily compensation range” or current Daily fees
What: Add the following text and a yes and no check box

“Opportunities may arise that don’t fit your typical range but may interest you for other reasons. For example, the opportunity would allow for extended travel in an exciting location, a networking opportunity, or work to better disadvantaged students. Would you be willing to negotiate your fee if there were other interests involved?”

☐ Yes ☐ No

12. Where: Hourly Fees
What: delete all text
Change To: “Hourly compensation range”

13. Where: below the drop down menu for “Hourly compensation range” or current Hourly fees
What: Add the following text and a yes and no check box

"As above, would you be willing to negotiate your fee if there were other interests involved?"

 Yes No

14. Where: Preferred audience
What: delete drop down box
Change To: check boxes where they can select multiple audiences and add other with fill-in field

15. Where: Do you deliver keynote addresses?
What: delete all text, add new text and multiple boxes
Change To: What types of presentations or programs have you delivered and would you be willing to deliver?

Experienced in...	Would like to...
Keynote	Keynote
Seminar	Seminar
Short course (up to 2 weeks)	Short course
Travelling courses	Travelling courses
Consulting	Consulting
Executive Coaching	Executive Coaching
E-learning	E-learning

16. Where: Next question below presentations and programs
What: Add the following text and drop down menu of spoken languages that allows multiple language selection
Change To: In what languages can you deliver presentations or programs?
Link for you: http://www.krysstal.com/spoken.html gives top 30 languages spoken across the globe

17. Where: Additional Qualification
What: add directions
Instruction pop-up: "Anything that you think we should know about you that will help us determine your qualification that are not listed above"

18. Where: Bio
What: auto-populate with bio if added when going through review process
Instruction pop-up: "Simply select your text, copy it, and then paste the text from your document" Are we going to ask them for a max or min extension?

Go to Functional Changes #1

19. Where: Primary Expertises
What: simplify to 2-3 columns to shorten the page length, alpha, other should be at end, and other should have a fill in box

*: Please add corporate responsibility (I know I can add it but would you please?) Thanks!

Instruction pop-up: "You must have substantial experience instructing, consulting, or coaching in these areas to check them"

20. Where: Secondary Expertises
    What: simplify to 2-3 columns to shorten the page length, alpha, other should be at end, and other should have a fill in box
    Instruction pop-up: "You must have experience instructing, consulting, or coaching in these areas to check them"

Go to Functional Changes #2 and then #3

21. Where: Submit query
    What: delete button due to functional change #2

22. Where: Degree boxes
    What: Boxing
    Change to: Please make box go around all degrees and have lines separate them instead

23. Where: Degree boxes
    What: Date Received
    Change to: Year Received
    Should we ask them about the University or Institution they got the degree?

24. Where: Your Published Books boxes
    What: Boxing
    Change to: Please make box go around all books and have lines separate them instead

25. Where: Above all input sections for books
    What: Add the following text
    "While peer-reviewed journal articles are important for establishing careers within our field, our Clients are particularly interested in your book publication because they affect those functioning in your field outside of your colleagues. Of our Clients, our International Clients tend to put even more weight on book publishing. Please list your book publications or widely circulated articles in the following boxes."

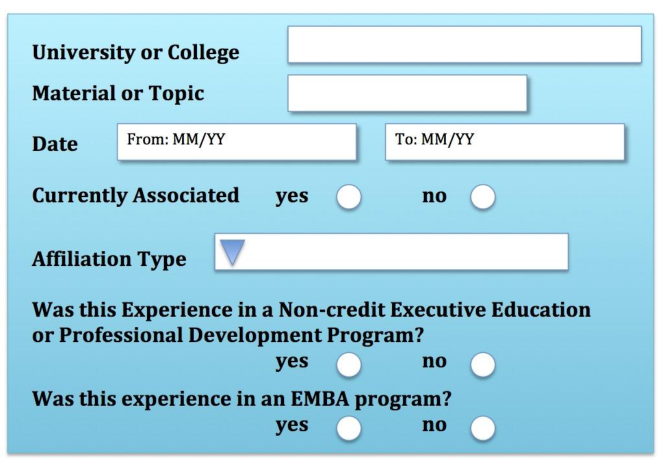
26. Where: Published Books
    What: Co-author
    Instruction pop-up: "Bibliographic format of Last name, First Initial"

27. Where: Published Books
What: Date published
Change to: Year Published

28. Where: Published Books
What: Synopsis text location
Change to: Top of box
Instruction pop-up: "You may use the jacket sleeve text or synopsis on the back of the book"

29. Where: New Qualifications section
What: Experience & Affiliations
Create: Similar to books and degrees this will be a repeated entry and look like the following diagram with the following fields:

- University or College
- Subject or Topic Taught
- Dates Affiliated MM-YY to MM-YY
- Currently Associated yes/no circles
- Affiliation type drop down list
  - Full Time
  - Part-time
  - Adjunct
  - Visiting
  - Lecturer
- Did you teach for their Non-credit Executive Education or Professional Development Programs yes/no circles
- Did you teach for their EMBA program yes/no circles



*currently associated will be above to and from dates. if yes is clicked the to date is inactivated.

30. Where: Above the section for Experience & Affiliations

What: Add the following text

"Similar to your book publications, our International Clients are very interested in which Universities you have taught or been affiliated with. Please list these experiences and indicate if you have instructed within their non-credit Executive education and/or Professional Development programs."

Go to Functional Changes #4 and then #5

31. Where: Next in line
What: Add the following
Should look like:

Promoting your programs

Capstone often gets requests for programs that have already been developed. Please let us know if you have seminars, keynotes, courses, etc. already developed, their title, a description of the presentation, and if you have marketing material associated with the presentation.

Type	Title	Description	Marketing Material
			☑
			☐
			☐
			☐

Promotion of your materials to providers will fall under the terms and agreements. You can review those in the what's next section of the database.

Eventually - This sticks the info into a searchable or sortable spreadsheet.
The list should be in the category lists on the admin splash page.
Marketing material will uploadable for different membership levels

B. Functionality Changes:

1. Following Projects

Action within database: Check boxes within the Update your profile interface, gives the faculty the ability to control the number of project descriptions they receive from us.

Action results: This is our form of "constant contact" as they are getting an idea of projects they could participate in keeping us in their minds.

Text to read:

"Each time Capstone International has a potential "Project" that we are engaged in proposing faculty for, you can be notified via an email containing a brief description of the project details. You can determine which Projects you would like to be informed of by checking one of the following boxes.

☐ Inform me of all *Faculty Opportunities* projects
☐ Inform me of projects within all my areas of expertise
☐ Inform me of projects only within my primary areas of expertise
☐ Inform me of projects only when I have been selected as a candidate

Text location: Within Faculty/Expert profile building interface after Bio box

2. Interface design

Action within database: the information that the user sees only extends to the bottom of their screen. At the bottom they can save and then hit next or previous when past the first page.

Action results: Ensures that Experts don't get overwhelmed with how much they need to enter.

Button text: < PREVIOUS | SAVE | NEXT >

3. Expert Information Sharing for 24-hour turnaround

Action within database: Add check boxes for Faculty to select how they want Capstone International to share their profile information with Clients when a 24-hour turnaround is needed

Action results: Capstone International will not need to contact Faculty when they have checked the box to share information, therefore saving time and energy

Text to read:

"Prior to presenting your profile information to our clients, we ask for your approval and respect your choice to be a candidate or not. We do however, get frequent requests for a 24-hour turnaround on an RFP and need to present your bio quickly. Please select your prefered method of having your information shared. Be advised that by selecting either permission button, you give **Capstone International** the right to share your information from our Faculty Opportunities Database with our client. If you have questions or concerns about what we share, please feel free to contact us at support@facultyopportunities.com. Also, please be aware that if you choose not to allow us to use your bio your name will automatically be excluded from our candidate selection list. "

☐ Permission to use bio without approval for all bio requests
☐ Permission only to use bio for 24-hour turn-around requests

□ Please, do not present my bio without prior permission

Text location: Within Faculty/Expert profile building interface somewhere towards the end.

4. Profile Update reminder email

Action within database: If an Expert has not completed their Profile within 2 weeks they receive an email to come back and finish their profile.

Action results: Ensures they get searched for and that we have all their info we need to conduct searches.

Email Text to read:

Hello (Full Written Name - automatically populated),

Thank you again for choosing Capstone International's Faculty Opportunities Database to engage you in executive education opportunities across the world. We would like to encourage you to complete your profile so we have the appropriate data to find you within our growing database of Experts. With over 3000 members we need as much information as you can provide to match you with the best fit opportunities. Please use the following links to return to www.FacultyOpportunities.com.

Button text:

□ Yes! Take me to Faculty Opportunities to update my profile
□ Please, remind me later I am swamped!
□ I've decided not to update my profile, please, remove me from your list

Looking forward to seeing you again!
The Capstone International Team

5. Add a "Guide Me" feature that takes an expert from one spot to the next to fill in the information that is missing.

6. Profile Completion Notification

Action within database: If an Expert has completed their Profile they will be notified by some sort of pop-up window or email that they are complete and invites them to come back regularly. Please see VI. for how the criteria that must be fulfilled and the new page they will visit. At the bottom of the email

Action results: Allows them to know they are finished and what to do next.

Text to read:

Thank you for your patience , the work it took to enter your data, and the information. We look forward to connecting you with the opportunities that will engage your talent and mind and provide a means for you to teach the world. Your What's Next button on your Profile Summary Page has now been activated and you can read at your leisure about the process you will go for when through to be informed of projects and how to become a candidate.

Please visit regularly to update your profile as you increase your experience and qualifications. Both experience and qualification increase your value to our Clients and the likelihood that you will be selected for a project. Thanks you and we look forward to working with you.

VI. Create the "What's Next" Interface

A. Simple Changes -

1. *What*: Create new "What's Next" page with text
   Accessed by: Button on the "Your Profile" page next to the Update Profile Button as mentioned in IV.
   Button Activation: "What's next button is activated once the following criteria is entered into the Profile of an Expert
   Activation Criteria: Expertise, degree, experience (at least 2 boxes), name number location, all the big ones

2. *Where*: Top of "What's Next" page
   What: Add text
   Corresponding action: From admin site have this email come out once a project is started and a search for Experts has been made
   Text: See Bottom of page for full Document. I think this could be broken up into separate pages with tabs at the top to get to each one.

What's Next

Thank you for your time and effort. You have entered enough data for us to match you to upcoming projects through Faculty Opportunities and Capstone International. The following will inform you of the process you will go through once you are selected for a project. You may also download a .pdf version of this page if you prefer a hard copy. You are welcome to call or email us anytime at info@facultyopportunites.com if you have questions.

1. Learning about projects. **Dustin, this would be one of the tabs**

Once Capstone International receives a request for Expert sourcing, we develop a project and search criteria that we use to create our potential candidate list. If you are on that list, you will receive a **Project Introduction Email** and or **Potential Candidacy Email** from us. Sometimes we send out an email about projects that have new and interesting topics for which we have not generated a list. All **Project Emails** will read in the subject line:

Capstone International's Faculty Opportunity: *current title of the project.*

Inside the email you will learn the details of the Project. Data may include main topics to be covered, audience, presentation style, dates, location, and other. In each email you will have the option to follow that project or unsubscribe.

□ Follow Project □ Un-subscribe

Following the project will allow you to see updates on the project as it is developed and potentially information you may need to accept potential candidacy. Each project will have an email account that you can send questions and feedback to. At any point, you can unsubscribe from a project and no longer receive information about its updates.

Additionally, in your profile you have the opportunity to determine which emails are sent to you. You can select to have emails sent only within your primary expertise or both primary and secondary as well as all project introduction emails and updates from all projects.

2. Accepting your Potential Candidacy this would be another, etc.

Potential Candidacy Email

In the **Project Email,** you will see a list of the materials you will need to send if you have decided to be considered or are accepting your candidacy. Materials we will ask for will either be required or preferred and include the following:

Project specific Bio	Project specific experience:
References:	Questionnaire (that you would fill in)
Sample course description	Testimonials
Sample presentation outline:	

You will also see a coordinating list on your profile within the database. This list will become active once you select to be considered or accept your candidacy. You will be able to browse and upload all your files directly to the database where we can review them. Please, only upload editable documents such as .doc, .pages, or .xls files. You will also find the dates that all files are due. Please keep in mind that you will need to upload all of your files by the date on your profile list or we will assume that you have withdrawn your candidacy for the Faculty Opportunity. Your List on your profile will look like:

3. Piggyback Opportunities with other opportunities you may already have.

If you are currently teaching a seminar or short-course, we can market that presentation for you. We have not only an incredible database of Experts, we have an ever expanding list of Clients looking to teach their executives the newest in hundreds of topics. We believe firmly in protecting your material and will negotiate your terms in our contracts.

If you are already travelling to present, please let us know as we may be able to find other clients to employ you. We could look to market your current material or a different topic within your expertises while you are in the area.

Have any other ideas? Please feel free to email us anytime at info@facultyopportunites.com if you have questions, comments or concerns.

4. Membership Opportunities

At Capstone International we get a lot of calls and questions about doing programs but the number of programs people end up wanting to do takes considerable work and is far fewer than the number of potentials we seek to fill. It is the nature of the business and we obviously like to do it. You however, may not. We understand that taking the time to fill in questionnaires and outlines can be the running work that we are used to but not you. Because Capstone International wants to prioritize and make our Experts look as good as we can we offer additional support and services to our Experts who choose to become members. If you become a member you will have more control over maintaining your data with us and even help editing it to tailor it for specific projects. Currently we offer the following memberships.

5. Your community

what you can do to enhance your experience

ADMINISTRATION USER INTERFACE development and changes

OVERALL development and changes

1. Match site look to company brand or vice versa
2. All lists should be in multiple columns making them appear easier to complete
3. All lists should be in alpha order with “Other” at the bottom and a field to fill in the other (do not limit the length of text beyond several sentences).

I. ADMIN SPLASH PAGE

A. Simple Changes -

1. *Add*:

Project Management		
Projects	add	change
Industries	add	change
Expertises	add	change

Client Management		
Clients	add	change
End Clients	add	change
Potential Clients	add	change
Students	add	change

Expert Management		
Experts	add	change
Invites	add	change
Applications	add	change
Potentials	add	change
Do not contact	add	change
Questionnaires	add	change

Email Lists		
Create New	add	change
List of Lists	add	change

II. PROJECT MANAGEMENT

IIa -Projects

A. Splash page- *Where*: Projects splash page

Change to: Look something like this...

Projects					➕ Add
Name	Status	Run Date	Edit	Associated email account	
ICTgeorgiastate		2.06.12	edit	ICTgeorgiastate@facultyopportunities.com	View Account
ExecEdUinvOregon		8.20.12	edit	ExecEdUinvOregon@facultyopportunities.com	View Account
ProgManageFLconf		12.06.12	edit	ProgManageFLconf@facultyopportunities.com	View Account

Project Payment Status after completion					➕ Add
Name	Invoice & Payment Status	Run Date	Edit	Associated email account	
ICTgeorgiastate	Expert Client	2.06.12	edit	ICTgeorgiastate@facultyopportunities.com	View Account
ExecEdUinvOregon		8.20.12	edit	ExecEdUinvOregon@facultyopportunities.com	View Account
ProgManageFLconf		12.06.12	edit	ProgManageFLconf@facultyopportunities.com	View Account

You can view and copy contacts but the emails in this account should not be editable.

Completed Projects				
Name	Completion Date	Completed?	Associated email account	
ICTgeorgiastate	2.06.12	Cancelled	ICTgeorgiastate@facultyopportunities.com	View Account
ExecEdUinvOregon	8.20.12	Done	ExecEdUinvOregon@facultyopportunities.com	View Account
ProgManageFLconf	12.06.12	Done	ProgManageFLconf@facultyopportunities.com	View Account

Instructions:

PROJECTS

- **Name** auto populate
- **Status** auto populate, here the example is the first one is sold and the next two are in development
- The **Run Date** is the run date from the project management section of the project development interface
- **Edit** gets you into the project
- **Associated Email Account** the name of the account is auto populated.
- **View Account** takes you to the account to view emails and track return to sender emails, answer questions directly, find problems faculty are dealing with.

PROJECT PAYMENT STATUS AFTER COMPLETION

- **Name** auto populate
- **Invoice & payment status** auto populate yes or no once a date is filled into the sections for payment received within the project description page under Payment Timeline & Management section
- The **Run Date** is the run date from the project management section of the project development interface
- **Edit** gets you into the project
- **Associated Email Account** the name of the account is auto populated.
- **View Account** takes you to the account to view emails and track return to sender emails, answer

questions directly, find problems faculty are dealing with.

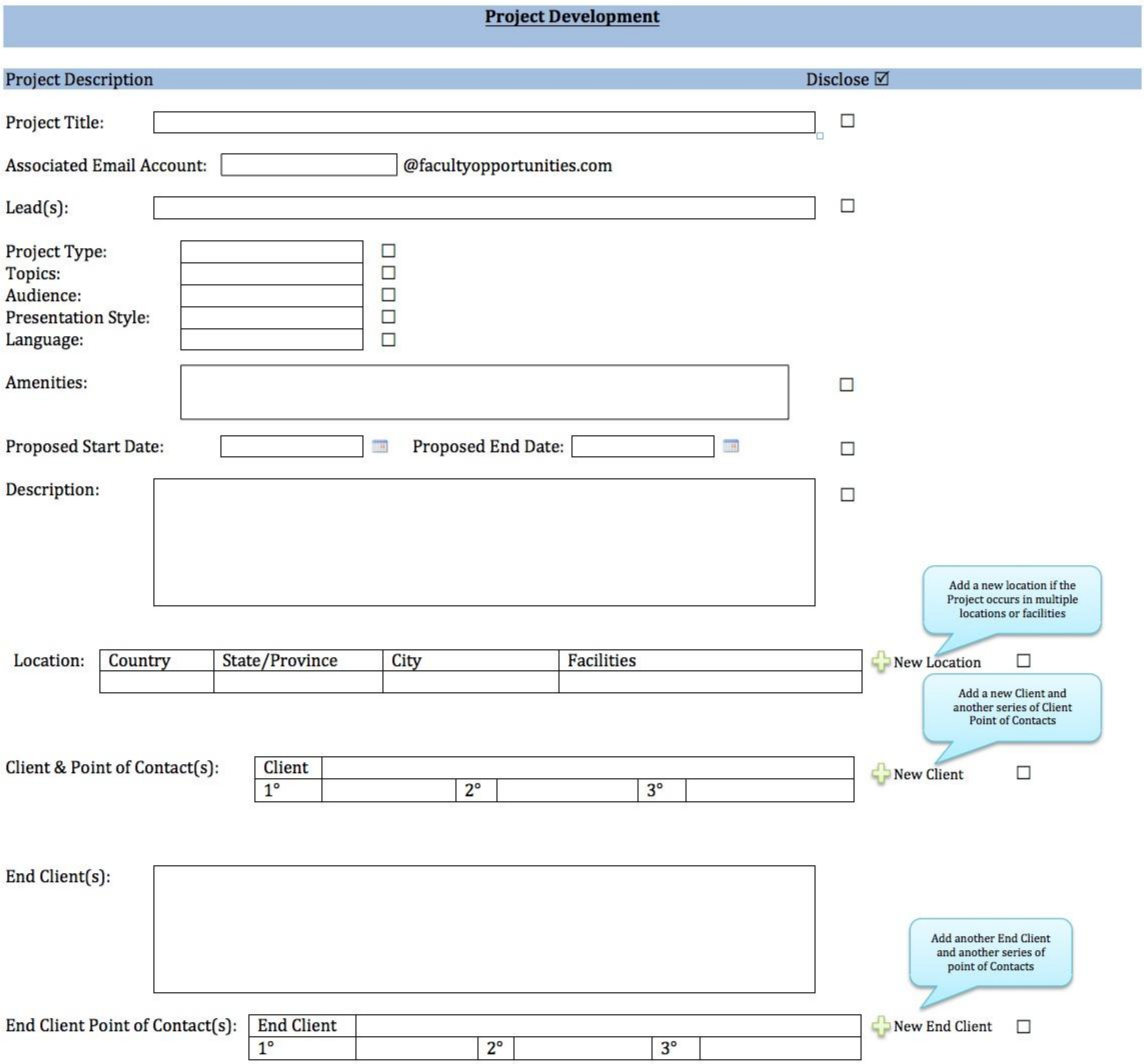
COMPLETED PROJECTS

- **Name** auto populate
- The **Completion Date** is the date is when the project has either run, been cancelled, put on permanent hold
- **Edit** gets you into the project
- **Associated Email Account** the name of the account is auto populated.
- **View Account** takes you to the account to view emails and track return to sender emails, answer questions directly, find problems faculty are dealing with.

B. Simple Changes - *Check out the end to see the whole thing together in one long picture*

1. *Where*: With each Project we add
   What: Required fields
   Change to: No required fields

2. *Where*: Whole Page
   What: Project Description
   Add:: Something that looks like...



Project Development

Project Description | Disclose ☑

Project Title: ☐

Associated Email Account: @facultyopportunities.com

Lead(s): ☐

Project Type: ☐
Topics: ☐
Audience: ☐
Presentation Style: ☐
Language: ☐

Amenities: ☐

Proposed Start Date: Proposed End Date: ☐

Description: ☐

Location:

Country	State/Province	City	Facilities

New Location ☐

Client & Point of Contact(s):

Client					
1°		2°		3°	

New Client ☐

End Client(s):

End Client Point of Contact(s):

End Client					
1°		2°		3°	

New End Client ☐

Instructions:

- Add **Lead** field
- Add an **associated email account** that the user can name simply
- Add **Project Type** drop down menu with the following options: Keynote, One Day Seminar - single Expert, One day Seminar - multiple experts, Multi-Day Seminar - single Expert, Multi-day Seminar - multiple experts, Re-sale of existing Program, Custom Program - single Expert, Custom Program - multi experts, University Sponsorship (it would be great if we could add more to the list in the future as we may do more things + New Topics method)
- Add **Topics**, text box for descriptive purposes
- Add **Audience** drop down list from choices given in expert profile with multiple

selections or multiple boxes that allows for a single selection in each box (you could do a + New Audience method)

- Add **Presentation Style** drop down list from choices given in expert profile with multiple selections or multiple boxes that allows for a single selection in each box (you could do a + New Audience method)
- Add Language drop down list from choices given in expert profile
- Add **Amenities** text box for description of perks
- Add **Proposed Run Date** that uses a calendar date selection method
- Description stays the same
- Add **Location & Facilities fields**, text fill in boxes
- Add + New Location & Facilities
  - *Pop-up Instructions*: When you put your mouse over the "New Location & Facilities", pop-up should read "Add a new Location if the project takes place in multiple places"
- Add + New Client, to the right of "Client Point of Contact(s)". This allows you to add another Client and at the same time a new point of contacts series of boxes just under the current one. The New Client window to fill in the information is below in *Corresponding Action*.
  - *Pop-up Instructions*: When you put your mouse over the "New Client", pop-up should read "Add a new Client and another series of Client Point of Contact"

Client & Point of Contact(s):

Client					
1°		2°		3°	

New Client ☐

to make it look like this:

Client Point of Contact(s):

Client					
1°		2°		3°	
Client					
1°		2°		3°	

New Client ☐

- *Corresponding Action*: The Plus to the right of the "New Client" box allows the user to choose either an existing (drop Down menu like you already have) or create a new Client using something that looks like the picture below...

Add Client

Existing:	
New:	
Type:	Drop down menu
Website:	
Address:	
City:	
State/Province:	
Country:	
Previous projects	List them here
Previous experts	List them here

Organization Contacts

Name:		Name:		Name:	
Title:		Title:		Title:	
Connection:		Connection:		Connection:	
SkypeName:		SkypeName:		SkypeName:	
Email:		Email:		Email:	
Phone:		Phone:		Phone:	
Contact method:	Drop down menu	Contact method:	Drop down menu	Contact method:	Drop down menu
Address:		Address:		Address:	
City:		City:		City:	
State/Province:		State/Province:		State/Province:	

Instructions:

i. **Type** drop down menu has: University, Seminar Producer, Agency, Corporation, Consulting Firm, Other (with description capability)
ii. i**Name** should be a drop down menu of all the contacts associated with a client and you should be able to type in a new client
iii. **Previous projects** and **previous experts** should auto fill
iv. **Connection** should be where we can describe how we are connected to this person so a description box would be good
v. **Contact method** is a drop down box: email, phone txt, skype, etc.

- Add New End Client +, to the right of "End Client Point of Contact(s)". This does the same thing as for "New Client" but the information needs to be saved in an End Client List. Everything is the same as above except... *Pop-up Instructions* when you put your mouse over the "New End Client" should read "Add another series of point of Contacts for another End Client"

3. *Where*: Budget
What: Make new menu
Add: the following...

Budget

Payment Method:			
Proposed Budget:		Date Proposed:	
Actual Budget:		Date Agreed:	
C.I. %:			
Expert %:			
Client %:			
Expert Total:			
C.I. Total:			
Client Total:			

Instructions:

a. **Payment method** drop down menu has: Set fee, retainer, other (makes new field to right appear where you can fill in what that is).

b. **% fields** should auto populate the total using an equation where you can enter a percent into two of the fields and the third is auto-populated

c. The **totals** are figured out from the Proposed budget budget or actual budget if it is filled in making the proposed budget field non-usable

d. **Date proposed** should autofill with the date that the proposed budget amount field was filled, but should be editable if someone forgot to enter it on the correct date

e. **Date agreed** is the date when the actual budget field is filled in and should be equal to the date in the Project Timeline & Management Field for Client Contract Signed. If they do not match an error window should say the two should match.

4. *Where*: Estimated Pay
   What: delete

5. *Where*: Deadline
   What: delete

6. *Where*: Under Budget
   What: Add Project Introduction Email
   Add: the following...

Project Information Email

Create Project Information Email.	View Project Information Email	All	or	Send to those with expertise in	&	Send to those with expertise in	&	Send to those with expertise in	SEND
Create Project Update Email.	View Project Update Email.	All	or	Send to those with expertise in	&	Send to those with expertise in	&	Send to those with expertise in	SEND
Add Project Update									

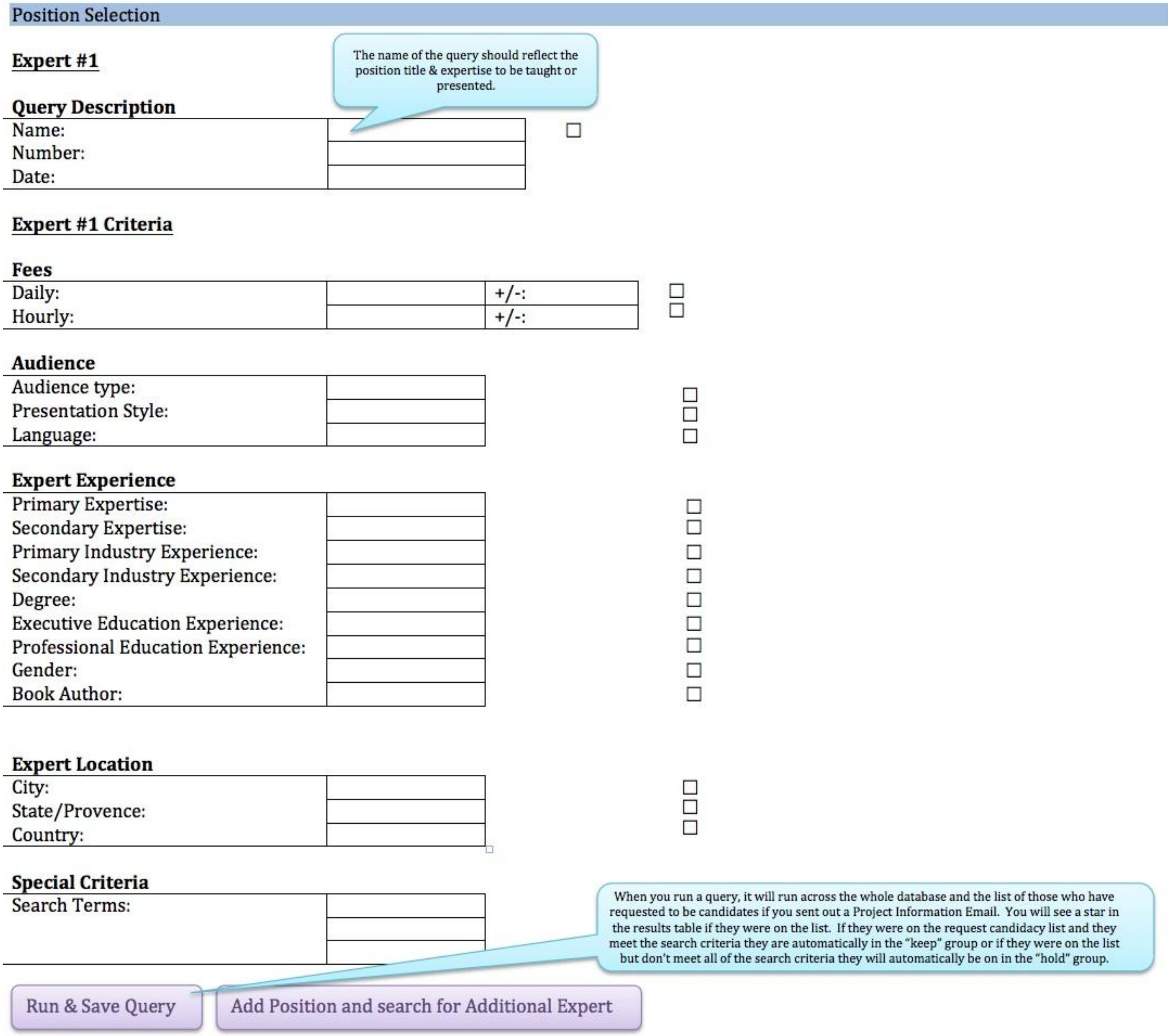
Instructions:

- **Create Project Introduction Email** Allows user to create an email in a separate interface (see

Emails section later on) that informs the experts about a project and allows them to then follow, ask to be considered for it, or unsubscribe which removes them from project updates.

- **View Project Information Email** allows user to view the email after they create and save it.
- **All** this sends the email to the entire database. It will rarely be used but we should have the option in case we need to do something with it. I think that this should then also be on the public pages of the website as exciting opportunities like you had set up before. In the Create Project Information Email there should be a place where we can select to post to public pages too.
- **Send to those with expertise in** user selects from a drop down list the expertises they want the email to go to. They can select up to 3. The database should have each experts requests for how they want to receive emails and it should correspond to their wishes such as the email goes out to their primary expertise list and the email is not in it then they do not receive the email. We can circumvent their not getting this email when we select experts through the position creation and expert criteria query.
- **SEND** Allows user to wait to send an email until they are ready by making the send operation a separate email.
- **Create Project Update Email** Allows user to create and update to the project email in a separate interface (see Emails section later on). Update has the same options that allow them to follow, ask to be considered for it, or unsubscribe which removes them from project updates.
- **View Project Update Email** allows user to view the update email after they create and save it.
- **Send to those with expertise in** allows the user to expand the recipient list to include new expertises. This will have to send the first email to these folks for the first time and the update.
- **SEND** Allows user to wait to send an email until they are ready by making the send operation a separate email.
- perhaps show recipients and and way to delete them would be good.

8. *Where*: Daily fee/hourly fee
   What: Replace with blue line titled Expert Selection
   Add: the following



Position Selection

Expert #1

Query Description

Name:	
Number:	
Date:	

Expert #1 Criteria

Fees

Daily:		+/-:
Hourly:		+/-:

Audience

Audience type:	
Presentation Style:	
Language:	

Expert Experience

Primary Expertise:	
Secondary Expertise:	
Primary Industry Experience:	
Secondary Industry Experience:	
Degree:	
Executive Education Experience:	
Professional Education Experience:	
Gender:	
Book Author:	

Expert Location

City:	
State/Provence:	
Country:	

Special Criteria

Search Terms:	

Instructions:

- **Query Description**:
  - Name is typed in and determined by the user.
    - Pop-up Instructions: The name of the query should reflect the position title & expertise to be taught or presented.
  - Number is determined by each query that is run and auto recorded. Each time a query is run it is saved in the query results tracking (see #8).
  - Date is auto populated as the date the query is run.
- Boxes are for disclosing this information in the Expert Candidacy Email and are additional to the ones in the Project Description area of the interface. When search criteria is selected as disclosed and is different than the duplicate fields above in the project description area, the information in the search criteria replaces that of the above choices (I guess you would say it is the default.
- The **fees** section is two drop down menus and each should have a plus or minus amount to broaden the search if needed.

- All other fields are drop down menu with the selection from the lists provided to experts when they were filling in their profiles.
- **Special criteria** search terms are keywords that should search the bio's and CV. This however does not need to be done right away.
- **Run and save query** kicks query out in tabular form the first expert search. Search results can be accessed in next section. When you run a query, it will run across the whole database and the list of those who have requested to be candidates if you sent out a Project Information Email. You will see a star in the results table if they were on the list. If they were on the request candidacy list and they meet the search criteria they are automatically in the "keep" group or if they were on the list but don't meet all of the search criteria they will automatically be on in the "hold" group.
    - Pop-up Instructions: When you run a query, it will run across the whole database and the list of those who have requested to be candidates if you sent out a Project Information Email. You will see a star in the results table if they were on the list. If they were on the request candidacy list and they meet the search criteria they are automatically in the "keep" group or if they were on the list but don't meet all of the search criteria they will automatically be on in the "hold" group.
- **Add another Expert** allows you to run a new query for another expert needed for the same project.
- If you change the criteria within an expert's selection criteria, the database needs to know that you are running a new query and change the name accordingly. We could add the words edit 1 then edit 2 or what ever. All subsequent edits end up in the following Section.

9. *Where*: Next section
   What: Query Results for Expert Position(s)
   Add: the following

Query Results for Expert Position(s)

Position #1 [ ]

Query Number	Query Name	Expert	Edited	
		Show		Select Query
		Show		Select Query
		Show		Select Query

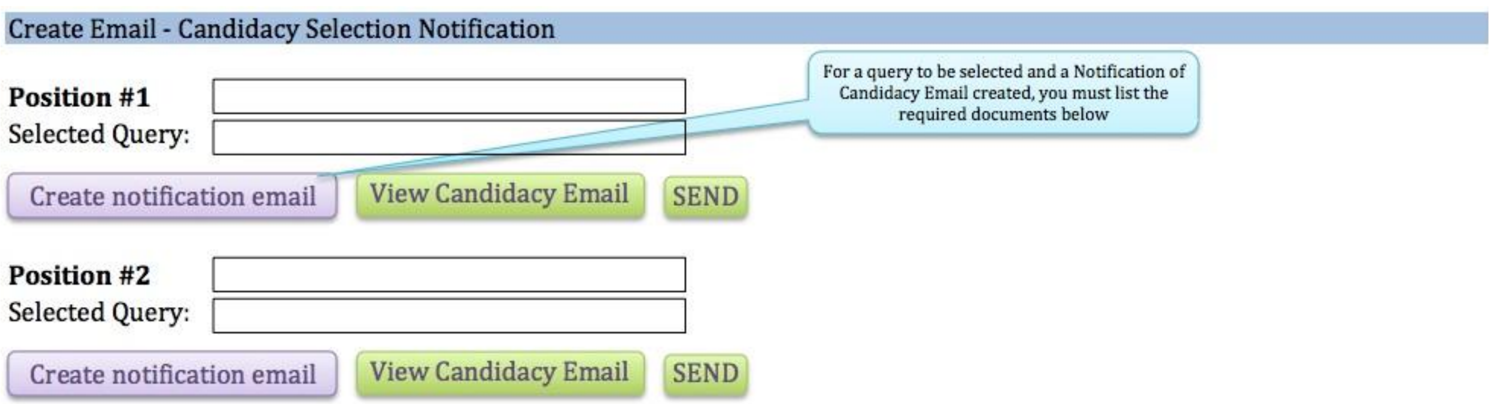
Position #2 [ ]

Query Number	Query Name	Expert	Edited	
		Show		Select Query
		Show		Select Query
		Show		Select Query

Instructions:
- Position #1 is the name of the position and is auto-populated
- Auto-populated **query number** each time a query is run as in the above section
- **Query name** is as given from a query

- **Expert** total is the number of experts given in one query. If there are multiple experts then there are multiple tables to show with the number for each expert.
- **Show** button allows user to see the results from the query, edit them, and then email expert list if the user is satisfied with the query (see functionality 2 below)
- **Edited** is a **yes** or **no** that is given once a query has had individuals deleted by a user (See Function #2). If it is a yes it is shown in the next line as Query #(according to the number of the query)b with the same name. If you figure out a better naming system then go for it. If that list is then edited then it is #c with edit2 following the name. Either will have fewer expert totals and edited column will read YES.
    - *For example*: 15 UO exec ed program
    - *turns into*: 15b UO exec ed program
    - 15c UO exec ed program
- **Select Query** : allows user to select the particular query they want to use as the list from which the Candidacy Notification Email is created from. That list then is accessed in the next section.

9. *Where*: Next
What: Create Email - Potential Candidacy Selection Notification
Add: the following



Instructions:
- Position #1 is the name of the position and is auto-populated
- Selected Query is auto-populated after selection has been made above
-
- **Select Query & Create notification email** this button takes the user to the Create Email interface (see Emails section below). For this to work the required documents have to be chosen in the required Documents section (see below). Thus the pop-up instruction read "For a query to be selected and a Notification of Candidacy Email created, you must list the required documents below"
- **View Candidacy Email** allows user to check out how email will actually look (like those in the functional changes below) and access the editing interface from an edit button visible in the view mode.
- **SEND** allows user to send out the email once they are satisfied with it and the documents to be

uploaded and their due date have been specified.

- Please note that the picture above shows that the the thrid query for position 1 has been selected inside that queries view when they selected the edit button for names. That's why the purple button shows up thus giving the user two ways to get to create a notification email, i.e. inside the actual query results and here in the tracker table.

Go to functional change #2 Expert Selection Process here

9. Where: Under Expert Query Results
What: Project Status
Add: Three circles that are different colors, that light up depending on the status of the project. If they are not lit they are lighter or more translucent. It looks like...

Instructions:

a. The orange light which really should be yellow, is always on when a project is being created, developed, updated, etc.

b. When the Project has things left to do, the lead of a project can fill those things in the boxes below.

c. The green box will always have a place holder in it to make it not go green. The lead can know the project is sold but that a few things are left to do before it is totally green like "Last bio for replacement faculty to be sent to client". This text can replace the placeholder to keep it off (perhaps it can go part way on). The light turns on, gets bright when the dates for both the Client and Expert contracts have been entered in the Payment timeline even if there are some things in the box.

There should be instruction pop-ups for each box:

i. Green light: "This light will up only when both the client and the Experts have signed their contracts and the dates those signed contracts have been received entered into the Project Timeline above"

ii. Yellow light: "Use this spot to keep a running list of to do's for the project. This light is always on when the project is in development"

iii. Red light: "If a project is cancelled, please put the reason in the box. It will turn on once something is written here."

10. *Where*: Next on the page down
What: New section called Project Management
Add: a wide blue line with Project Management in bold and underlined

11. *Where*: Under Expert Selection Query Lists
What: New section called Payment Timeline & Management

Add: the following

Payment Timeline & Management

Date Project Initiated:		
Proposed Project Date:		Today /
Actual Project Run Date:		Today /

Expert Query Run:		Today /
Expert Proposal Created:		Today /
Expert Proposal Sent:		Today /
Expert Contract Sent:		Today /
Expert Contract Signed:		Today /
Expert Invoice Received:		Today /
DUE DATE for Expert 1st 50%:		Today /
DUE DATE for Expert 2nd 50%:		Today /

Client Contract Created:		Today /
Client Contract Signed:		Today /
Client ***Expert Proposal*** Received:		Today /
Client ***Expert*** selected:		Today /
Invoice sent to Client:		Today /
DUE DATE for Payment 1st 50%:		Today /
DUE DATE for Payment 2nd 50%:		Today /

Instructions:
a. First two dates auto populate from above timeline fields
b. We fill in the rest using either the today button or calendar
c. There will be some rules that auto generate dates but we should be able to edit them.

12. *Where*: Next section
What: New section called Expert Acceptance of Candidacy
Add: the following

Expert Acceptance of Candidacy

Candidates from Selected Query
Query Number:
Query Name:

If you do not have enough selected candidates, you can go back to your query and select addition al candidates to notify.

Name	Select or Hold	Accepted
		Yes

Instructions:
- **Query Number & Name**: auto-populated by database from query which was chosen to email potential candidates
- This table just lists the names of the candidates, what their status was (keep or hold) and if they have accepted their candidacy. This allows the user to easily see who has accepted.

- As soon as the Candidate accepts, their profile page is populated with a Required Document box as defined in the next section (see below)
- The pop-up instructions for the user read "If you do not have enough selected candidates, you can go back to your query and select additional candidates to notify."
- If candidats reply yes and the required documents are not listed then the database reminds reader to do so.

13. *Where*: Next section
    What: New section called Required Documents
    Add: the following

Required Documents

Position #1

Position Name:	
Date Candidates Notified:	
Date Documents Due:	
Date Additional Candidates Notified:	
Date Documents Due for group 2	

Required Documents:

Number	Type	Notes	Required or preffered	Delete
1				
2				
3				

Add Document

Create Questionnaire | Add & Edit Existing Questionnaire

Complete

Additional Required Documents:

Number	Type	Notes	Required or preffered	Delete
1				
2				
3				

Add Document

Create Questionnaire | Add & Edit Existing Questionnaire

Complete | Notify Candidates of Additional Materials

Document Tracking

Candidate	Doc #1	Doc #2	Doc #3	Completed	Reviewed	Select - Client Proposal 1	Select - Client Proposal 2
	View	View	View				
	View	View	View				

Create Client Proposal | View Client Proposal | SEND

Create Client Proposal 2 | View Client Proposal 2 | SEND 2

Additional Document Tracking

Candidate	Doc #1	Doc #2	Doc #3	Completed	Reviewed	Select - Client Proposal 1	Select - Client Proposal 2
	View	View	View				
	View	View	View				

Create Client Proposal | View Client Proposal | SEND

Create Client Proposal 2 | View Client Proposal 2 | SEND 2

Instructions:

- **Position Name, date Candidate notified**: auto-populated by database from query for position name, and the date from when the candidacy email notification SEND button was selected.

- **Date Documents Due** user defined.
- **Date additional candidates notified** if more people have been notified for a position out of the hold group by an email from the query list (not sure if I did this or not let me know) then this date is auto-populated.
- **Date Documents Due for group 2** user defined
- **Required Documents** Type is a drop down menu and can include the following
  - Project specific Bio:
  - Project specific experience:
  - References:
  - Testimonials:
  - Sample presentation outline:
  - Sample course description:
  - Video link:
  - Questionnaire:
- **Notes** Allows user to write notes that will show up on the Expert's Required Documents box next to the document upload spot (see below)
- **Required or preferred** drop down box of the two, will affect if a candidate makes it to review stage. If there is a required document missing prior to the due date after reminder emails have been sent out, they will be taken off the list.
- **Delete** removes the document from the list
- **+ add document**, allows user to add a fourth document in this case because the example above shows that the user has already added 2 more the to the first one making the initial total 3.
- **Create Questionnaire** allows user to make a questionnaire to be filled in (see below in Expert Management Section).
- Add & Edit Existing Questionnaires
- Complete
- Additional Required Documents
- **+ add document**, allows user to add a fourth document in this case because the example above shows that the user has already added 2 more the to the first one making the initial total 3.
- **Create Questionnaire** allows user to make a questionnaire to be filled in (see below in Expert Management Section). The Create Questionnaire interface will then attach it to the profile page of the experts for them to fill in. It would be great if they could do it themselves online and not have to print out. Also the Create Questionnaire interface will create a new line in the required documents table so the user can write notes to go with it that will appear on the Expert's profile page in the Required documents box.
- **Add & Edit Existing Questionnaires** this allows us to use old questionnaires as a start and just edit them for other projects but save them under a new name. I have added a Questionnaires interface to the ADMIN splash page where the list of questionnaires will be kept.

- **Complete** This means that all the documents have been added and the Candidacy Notification Email can go out.
- **Additional Required Documents** I am sure the Client's will go through wanting more things so we will have to have round two. Hence the fields with the same directions as above.
- **Notify Candidates of Additional Required Documents** Clicking this button will bring the user to the create Additional Material UPDATE email interface. See below in Functions and Emails sections.
- **Document Tracking** This table is created when the required documents are selected in the tables above. It takes the names from the list of Candidates in the Expert Acceptance of Candidacy section that have accepted their candidacy by the date given in their Candidacy notification email and adds columns according to the number of Documents selected. In addition the columns completed, reviewed, and Selected for client proposal are always added. All documents uploaded should be able to be viewed here in pop-up windows.
- **Create client proposal, view client proposal and send** are the same for other emails above.
- If the Client then wants to see more people user can identify those from the required document tracker in the **Select - Client Proposal 2 column** and then follow through the purple buttons for the second proposal. Experts from the first proposal can be added so the proposal looks more like an update if users want.

B. Functional changes

1. Project Introduction Information Email and Updates

Action within database: Create an email that is loaded with the disclose button selections that can then be edited. If the user then decides or is given more information they can create and update to that email. The database will know to repopulate the email with data that has been changed in the Project Development Interface.

Action results: Allows CI to inform Experts of Projects and allows Experts to control how they view and interact with emails.

Text is also in a word document shared with you so you can copy paste.

Project Introduction Information Email

Dear "*Their name automatically inserted here by database*",

Capstone International is now engaged in the following Faculty Opportunity and would like to notify you as it developed! You are receiving this email because you selected to receive Project Emails in your areas of expertise when creating your Faculty opportunities Profiles. You have the option to follow the project, request to be considered as a candidate, or unsubscribe from updates on the project as it develops. You simply need to select the button that fits your needs below.

If you choose to the "Follow & Consider Me" button, your name will be added to our candidate list, your credentials evaluated for selection and you will be sent updates as the project develops. If you choose the "Follow Project Only" button, your name will not be added to our candidate list but you will be sent updates as the project develops. If you choose the "Remove Me & Un-subscribe" button, you will not receive any further updates on this project.

Capstone International's newest Faculty Opportunity
Your gateway to teaching the world!

Project Name:
Project Type:
Topics:
Audience:
Presentation Style:
Date:
Expanded Description:
Location:
Amenities:
Compensation:

Please select from the following actions by *"Date, inserted by user"*

☐ Follow Project ☐ Remove Me & Un-subscribe

If this email was sent to you by mistake please feel free to inform us at info@facultyopportunities.com or if you wish to change your settings for receiving emails please visit your profile at www.facultyopportunities.com. Thank you for being a part of Capstone International's Faculty Opportunities.

Sincerely,
Capstone International

EDIT

Instructions:

- Once the email is received by the expert and they select the follow and consider me then they are added to a table with their name so that it can be queried after the Date for hitting a button is complete. Once that date is hit, the list is available to view in the Experts Requesting Candidacy from Project Information Email portion of the Project development interface above.
- That list can then be queried by us.
- If the expert selects the Follow only they do not have the

- This is the view of the email when a user selects view email in the Project Developement Interface. When they do, they should be able to edit the email and are thus thrown into the email editing interface which is described in emails blow. This will be the same for all emails when in the view email mode. But it should look something like...

www.facultyopportunities.com. Thank you for being a part of Capstone International's Faculty Opportunities.

Sincerely,
Capstone International

EDIT

Project Update Email

Dear "*Their name automatically inserted here by database*",

The following Faculty Opportunity has been updated. Your options for consideration, following and un-subscribing are the same. You simply need to select the button that fits your needs below.

UPDATE

Capstone International's newest Faculty Opportunity

Your gateway to teaching the world!

Project Name:
Project Type:
Topics:
Audience:
Presentation Style:
Date:
Expanded Description:
Location:
Amenities:
Compensation:

Please select from the following actions by *"Date, inserted by user"*

☐ Follow & Consider Me ☐ Follow Project Only ☐ Remove Me & Un-subscribe

If this email was sent to you by mistake please feel free to inform us at info@facultyopportunities.com or if you wish to change your settings for receiving emails please visit your profile at www.facultyopportunities.com. Thank you for being a part of Capstone International's Faculty Opportunities.

Sincerely,
Capstone International

2. Expert Selection from Query

Action within database: Database produces a series of tables that allows us to review queried expert results and send chosen experts emails. These emails will let them select or decline their candidacy and monitor projects. Query results should be editable and names will be able to be removed or put on hold for backups.

Action results: The query and selection of experts is the main way we select, review, and invite experts to work on a project. This is the critical section of the database.

a. In the **Experts Query Results**, we would like to be able to look at query results in tabular format. At the end of each Experts row we would like to have three buttons for Keep, Hold, and Delete. Once we click save changes at the bottom, the query changes name as stated above by adding a lowercase letter after the number associated with the query. For example the query could look like:

Query Results

Expert #1 **Iteration Number**:1 **Name**: ICT_Infotec **Date**:10.2.2012

	Name	Current Employer	Highest Degree	Degree From	Daily Fees	Hourly Fees	Primary Expertise	Secondary Expertise	Primary Industry Experience
Selected Criteria	-	-			1000-1500	150-300	IT	**Program Management**	Banking
View Profile	John Xi	U. Wisconsin	PhD	Harvard	Yes			Yes	Yes
View Profile	Jen Young	Thunderbird	PhD	Yale	Yes		YES	Yes	No

	Degree	Executive Education Experience	Professional Education Experience	Gender	Book Author	City	State/Province	Country	Search Term 1
Selected Criteria	PhD	Yes	**Yes**	M	No	San Diego	**California**	USA	ICT
	Yes		Yes	M	Yes	El Cajon	Yes	Yes	No
		No	No				Yes	Yes	yes

	Search term 2	Search term 3
Selected Criteria	**Communications**	-
	Y	

Action **Email**

Keep	Hold	Delete	From Requesting Candidacy list	Following project, did not request candidacy	

Save Query

Instructions:

- Once the user has selected whom to keep, hold and delete, if they select Save query it becomes a new Query result without the experts that the delete button was selected for.
- If the user selected Keep and Hold and the people to email the next step is for them to Create a Candidate Notification email. In which case they would hit the Save Query & Create Notification Email.
-

The ones we send materials to will get a "your projects" box on their profile page that has the name of the project and required info that they need to send to us with browse and upload files. When those files are uploaded we are notified. Once we get to our expert proposal deadline, we can create a standard exportable proposal of the profs docs and info. We can then edit it and send it to the client. Once the client receives the proposal they send us back a list of selections and we select those people. they get an email saying they are selected here is the contract. Etc.

What if instead of a "keep", "hold", and "delete" settings, we do "approved", "choice 1", "choice 2", "choice 3", etc., and "rejected"? It makes sense from a project flow perspective that we would have more than two tiers of potentials experts. If we reject someone, it would then default to the next tier. This would allow us several "back-up plans" if the client didn't like our first choice. You are definitely onto something here Dustin, and I see your thinking, let's see if this works to explain. At this point all the keepers will send in their information for us to review and choose from. The Client will choose 1st, 2nd, 3rd, etc. since it is their job to select who they think will fit the end user best. Of course we filter for them but they like to have final say. However, at this point prior to the Client's selection, we will accept or reject them. If they are rejected they can be in the hold group or deleted. The hold group we will use only if our selections are not liked by the Client. So we don't want to do anymore work than necessary and making those choices prior to reviewing their material is too much upfront work. If we did need to find more people, the holds, we would then go into individual profiles and see if we like them first then send out another candidacy email to obtain their material.

What do we do about approximate matches? Do we limit approximate matches to daily/hourly fees, do we make some fields 'approximate match friendly', or do we make it manual? I would appreciate your suggestions here. That was kind of the "make required" idea. I would think it comes down to whatever is on a scale and not categorical.

b. **Expert Potential Candidacy email** The email should have the following standard format prior to editing but after users have queried experts. The text is in a separate file that is shared with you for copying and pasting.

Expert Potential Candidacy Email

Dear "*Their name automatically inserted here by database*",

Congratulations! You were matched as a potential candidate for a *Capstone International Faculty Opportunity*. Please, read on for information regarding this exciting opportunity.

Capstone International's Faculty Opportunity

Your gateway to teaching the world!

Project Title: *(Auto-populated by field selections in Project Development Interface)*
Client:
Project Description:
Topics:
Position Selected for:
Participant audience:
Presentation Style:
Date:
Amenities:
Location:
Compensation:

To be proposed to our client as a final candidate, you will need to upload further information listed below (.doc only, please) and possibly fill in a questionnaire. You have until *Date (defined by field in database when creating email)* to accept or decline this selection and upload your additional information. If you do not make a selection or upload your files by the given date, your name will be removed from the list. To upload these files and answer your questionnaire, please go to your profile at www.facultyopportunities.com.

Project specific Bio: *(Required or Preferred written here, plus and option to describe what is necessary)*
Project specific experience:
References:
Testimonials:
Sample presentation outline:
Sample course description:
Video link:
Questionnaire:

Please select from the following to inform Capstone International your desire to continue with this project by *Date (entered when email is created).*

☐ Confirm Selection ☐ Decline Selection

If you confirm your selection as a candidate, you give **Capstone International** the right to share your information with the client requesting a candidate proposal. Confirmation will also subscribe you to follow the project and you will receive emails that will update you as the project evolves and more details are given. We are excited about this potential project and look forward to reviewing your materials. Thank you for being a part of Capstone International's Faculty Opportunities.

Sincerely, Capstone International

Instructions:

- The email will be auto-generated and populated by the database. The list of categories that describe the project that are in the email are determined by the disclose buttons.

- The date that the Expert must respond by is determined in the creation of this email (see Emails for a complete description)
- The list of necessary documents is determined in the project management section of the Project Development Page (see above for its description)
    - When an administrator builds the email they have the opportunity to fill in descriptions of what they need for each type of document.
- When the Expert selects Confirm or Decline Selection the result is recorded
    - Confirm creates the upload document box on their profile
    - Decline removes them from the list
    - a new list is generated after the due date that includes people who confirmed only...it could be named post selection list or whatever

<u>3. Uploaded document Interface</u>

Action within database: When an Expert accepts their *potential candidacy* on their Profile they will see a box that tells them what to upload for a particular project. If they have several boxes each one should have the project title on the top so they can identify which materials go where.

Action results: Allows a centralized repository of documents, some built in for convenience when creating a Client Proposal some just attached file.

1. When an Expert goes to their page and sees where they need to upload docs they will be able to do the following for each type of material:
    a. **Project specific bio** could be cut and pasted into a box that could transfer data for us to read and to Client proposal. Warning ahead of time...it will need to be editable.
    b. **References** could be built in, fill in boxes (it would be cool to maintain these for people) - can choose ones used in application process to faculty opps or add more
    c. **Testimonials** could be cut and paste, we will likely want to take out quotes for marketing purposes.
    d. **Sample Presentation Outline** upload document
    e. **Sample course description** - could be cut and paste box that could transfer data for us to read and to Client proposal. Warning ahead of time...it will need to be editable.
    f. **Video Link**: self explanatory
    g. **Questionnaire** - built in would be awesome but it seems like it would be challenging to program. You would have to have a place to write the question, determine if it is a Yes/No/Maybe or categorical or text box answer, and then what to do with the answers. The answers would need to be seen in spreadsheet format to review so candidates could be compared just by looking at the spreadsheet instead of having to go back and forth between profiles. Similar to looking at query results. It would be great to be able to save the questionnaire and re-use it or re-tailor it. In fact it would be great to have a feature to make questionnaires to send out to groups of people in emails or attached or whatever.
        i. Or we could have the survey via survey monkey

Should look something like this...

4. Expert selection from Supplemental documents

Action within database:

Action results:

We will be taking over from here for now.

5. Expert Proposal to Client

Action within database:

Action results:

This can happen once we select the experts we like best to send a standard but editable proposal to the client through which they can select their candidates

that then leads to...

Text location: libbo dibbo

6. Expert Selection Notification Email

Action within database:

Action results:

email that notifies them of acceptance, profile page has it too, and then we take over from here - other things like contracts and such can be built in later

Do we have a place to make the project public to the whole database? Do we have a way to cancel a project - it might be a good idea to have this at the projects splash page which currently looks like:

Projects				**Add**
Name	Status	Run Date	Edit	Associated email account
ICTgeorgiastate		2.06.12	edit	ICTgeorgiastate@facultyopportunities.com View Account
ExecEdUinvOregon		8.20.12	edit	ExecEdUinvOregon@facultyopportunities.com View Account
ProgManageFLconf		12.06.12	edit	ProgManageFLconf@facultyopportunities.com View Account

Could add a publicize button and a cancel button. To make it look like this:

Projects				**Add**			
Name	Status	Run Date	Edit	Associated email account	Publicize	Hold	Cancel
ICTgeorgiastate		2.06.12	edit	ICTgeorgiastate@facultyopportunities.com View Account	☐	☐	☐
ExecEdUinvOregon		8.20.12	edit	ExecEdUinvOregon@facultyopportunities.com View Account	☑	☑	☐
ProgManageFLconf		12.06.12	edit	ProgManageFLconf@facultyopportunities.com View Account	☐	☐	☑

Publicize button allows you to create a public version of the project that appears on the current project page of the website and perhaps if an experts areas of expertise on their profile. It should have a way to close from profiles. What is seen is the same stuff that is disclosed for emails, but it should be editable since what we tell potential candidates might be different than what we want everyone to see. Hold means the project is on hold and that the client is working on something, usually budget. We would want at this point to send an email out to the potential candidates or where ever we are the candidates that the program has been put on hold. The Cancel button makes a project send an email out saying bye bye birdie. This can all be later.

IIb - Expertises

A. Simple Changes -

1. Where: List
   What: Order
   Change to: Needs to be alphabetized, with Other always at the end

2. *Where*: Expertises Splash Page
   What: Expertises Action drop down list
   Add: View Other list
   Corresponding Action: Shows a list of Expertises listed by Experts in their profile. This list should be a sortable table so we can ascertain the common topics we have not put in our list. The list should have an option to add a particular topic to the expertises list from that table. So it could look something like:

Other Expertise	Add
Espionage	✚
Espionage Tactics	✚
Assassination	✚
Animal genetics	✚
Gerbil management	✚

   Do we want this to have Experts associated with each "other expertise", and do we want to display this information on the admin side?

IIc. Industries

A. Simple Changes -

1. Where: List
   What: Order
   Change to: Needs to be alphabetized, with Other always at the end

2. *Where*: Industries Splash Page
What: Industries Action drop down list
Add: View Other list
Corresponding Action: same as above.

III. CLIENT MANAGEMENT - Clients

A. Simple Changes -

1. Where: "Select Client to Change"
What: Text
Change to: Clients

2. Where: Add Client
What: Presentation and fields as shown above in Projects
Change to: See above II.A.3.

3. Where: To the right of Action drop down menu
What: Add another drop down menu that allows us to sort clients by type
Add: List of types of Clients: University, Seminar Producer, Agency, Corporation

4. Where: Right side of each blue for each Client
What: Button that connects to the projects associated with that client
Add: Button says "Projects"
Corresponding Action: When you click on the Projects Button a table appears (or new page or whatever you think is best to show this in) with all the projects done for the client. It is sortable and you can ask the database to do several things. It should look like this...

Client Projects

Client

Name:	
Number:	
Date Client Entered:	
Date First Project Started:	

Sold
In Development
Cancelled

Project Name	Type	Expert(s)	Status	Completed	CI 1st Payment Days Pending	CI 2nd Payment Days Pending	Expert 1st Payment Days Pending	Expert 2nd Payment Days Pending	Cancellation Reason	CI total/%	Client Total/%	Expert Total/%

Stats

	1st Payment	2nd Payment
Average days payments late:		
Average days late to expert:		

Average % CI Profit	
Total CI Profit - Current Year	
Total CI Profit – Last Year	
Profit % & Total Change	

Yup, we like them
Average Client
Consider disengaging

Instructions:

a. Auto-populated name and number of projects according to those associated with the Client and shown in table

b. Date is auto-populated for when the Client was entered (this can come from either the Client List or the potential client list, whichever comes first) and when the first project as associated with that Client

c. The table should be sortable by each column title except when there are multiple experts (perhaps we could add columns when a project has multiple experts).

d. Project name, type, and expert(s) are auto-populated.

e. Project status comes from II.A.12.

f. Completed is marked with a yes or check when and is a formula that reports the number of days the first and second payment is late.

5. Where:
What:

B. Functional changes

VI. CLIENT MANAGEMENT - Potential Clients
VII. CLIENT MANAGEMENT - Students

EXPERT MANAGEMENT

- **create questionnaire -** Faculty assessment of program. We should develop a survey to ask what people thought of their experience. We can get reviews of us and the client and have them as blog material and such. At some point we could have the database send the questionnaire when the date for the program has passed and have it sent automatically or via notification and then acceptance of send.

RELATIONAL ASPECTS of database and the future

I. Future functionality

Here is the green, the later but better stuff that we want but can wait for. This is the stuff that will make this thing awesome.

A. In depth Query of Faculty - it would be nice to be able to search their bios for information that we don't usually query to get to the candidate list but may be helpful to refine the list.

B. Exportable forms - We want the database to export standard forms to word that includes logo and standard format but are editable. For example, we would like to have a standard candidate proposal to send to Client's that we can edit for each Client type. Or we would like to make an auto populated

C. Faculty Flagging and Rating - Faculty Flagging would allow us to flag people that are hard to work with or that we have to fire or would allow us to delete and bar them from the database. Faculty rating would allow us to easily tell clients how an expert is rated against other expert in the same expertise and or industry. This way we can also interact with faculty members by showing them how to get a higher rating and how to get more opportunities. For both of these having a notes section would be awesome.

D. Monitoring metrics- We would like to monitor the use of the database to tell us how our marketing and project completion is done. I think a simple red, yellow, green system will work for most sections of the database. We would like to see the following

1. How many people are applying to the database in one week, month, year
2. How quickly are we reviewing and accepting/rejecting applicants
3. How many applicants are accepted, rejected but data maintained, or rejected
4. How many people do we invite in one week, month, year
5. How many invitees accept or decline invitation
6. How many projects do we start
7. How many projects go green or red
8. How do we measure up? In other words how much are we making per project and perhaps develop a way to group them so we can then see where our major revenue sources lie.

E. Training or Consulting group info storage - some sort of interrelational spread sheet that maintains data on groups of consultants we come across while researching experts or projects. We may call these groups Industry service providers (not sure). This would be a place to store information on such companies so we don't have to search again when an opportunity to use them arises. It should include basic info but also how the company is structured. For example if there are groups within the company we should be able to see groups and then who is the lead and who are the team members.

F. Managing contact with experts & clients - we will want to generate emails that come from faculty opportunities and go out to the whole list, or lists by expertise for our own form of constant contact. We can use the same means as creating projects but in the admin user interface we will call it simple email contact or something of the sort. This way we can keep faculty involved with the database and us. All emails should have similar look and feel with logo integrated etc. We will want to do this by type of client as well and have emails go out to point of contacts for each client being able to search for emails by different qeuries. Or we could simply use the project creation button but it would be nice to have it the same set-up but in a different section so we can use different metrics than those for monitoring the projects and their success.

TERMS & CONDITIONS - this can go either on their profile page or on the what's next page or both. When we have new terms and conditions we need to have updates show up and a new I agree place for them to "sign"

By uploading this video you give Faculty Opportunities and Capstone International the rights to use it on their websites for promotion of you as an Expert. Because we believe in maintaining great relationships with our Experts, we will notify of any uses beyond Candidate Proposals for our Clients and our websites.