



# Guide to using OGX CRM

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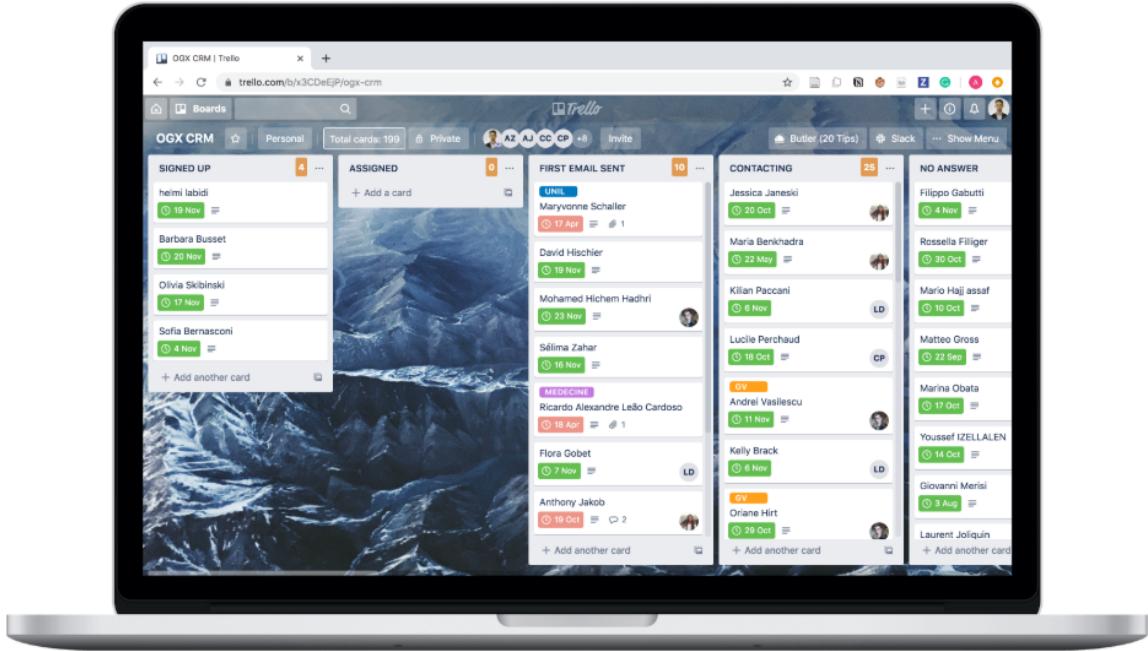
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## 0. Introduction

This short guide outlines the functionalities of the Trello board, lists and cards. Every **OGX Member** should read this guide to understand this system.

## 1. The List system as the Customer Flow Pipeline

### 1.1. A centralised view of the EP pipeline



## 1.2. Available Lists and meaning

| Name                        | Meaning  |
|-----------------------------|--|
| <u>Signed Up</u>            | New Sign Up Cards are added to this List   |
| <u>Assigned</u>             | Move Card here once an OGX Member has been assigned to manage the EP                         |
| <u>First Email Sent</u>     | Move Card here once an introductory e-mail has been sent to the EP                           |
| <u>Contacting</u>           | Move Card here if EP is being contacted  |
| <u>No Answer</u>            | Move Card here if EP does not answer   |
| <u>No Longer Interested</u> | Move Card here if EP is not interested anymore   |
| <u>Interested For Later</u> | Move Card here if EP is interested for later   |
| <u>Recontacted</u>          | Move Card here if EP is being recontacted after either "No Answer" or "Interested For Later" |
| <u>Applied</u>              | Move Card here if EP has applied   |
| <u>Accepted</u>             | Move Card here if EP was accepted  |
| <u>Approved</u>             | Move Card here if EP was approved, meaning they paid the exchange fee                        |
| <u>On Exchange</u>          | Move Card here when EP is on exchange  |

| Name                        | Meaning   |
|-----------------------------|---|
| <u>Back From Exchange</u>   | Move Card here when EP is back from exchange                          |
| <u>Feedback Form Filled</u> | Move Card here when EP has filled out a feedback form on the exchange |
| <u>Ambassadors</u>          | Move Card here if EP agrees to be an ambassador of AIESEC             |
| <u>Cancelled Projects</u>   | Move Card here if EP exchange is cancelled.                           |

### 1.3. Automatically handled shifts

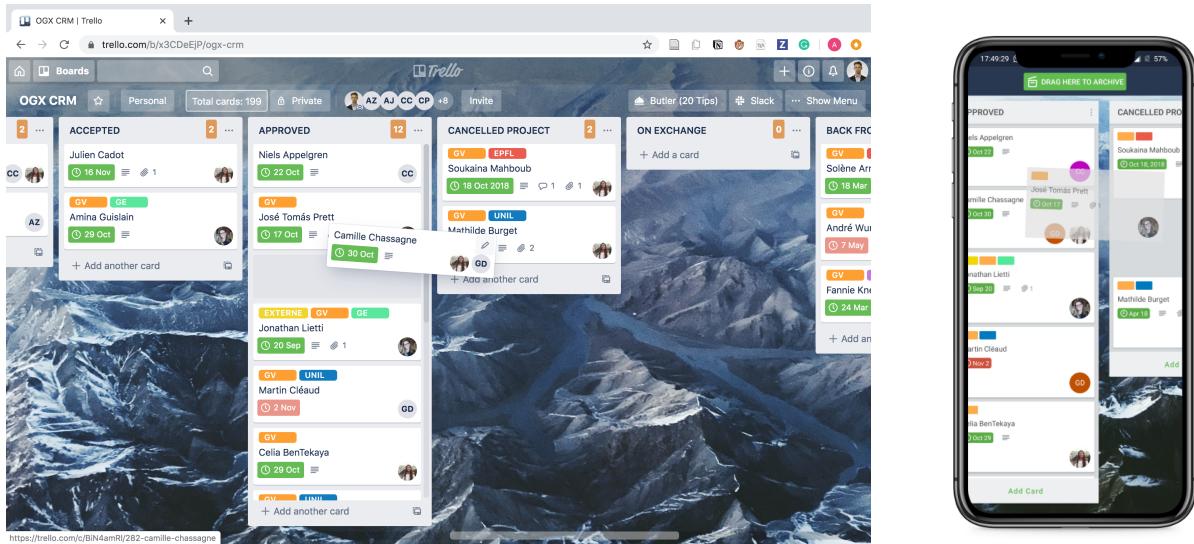
- Sign Ups are automatically fetched from EXPA and added to the Trello CRM.
- *Coming soon: Once the Card is assigned to a member of the OGX team using Trello, a mail is sent to welcome the EP to AIESEC and take them through the next steps of the Application Process.*
- *Coming soon: Cards are automatically moved to the 'Applied', 'Approved', 'On Exchange' Lists by adding a comment to the card specifying the activity that caused the move (e.g. "[Firstname] [Name] applied to 4 opportunities", the opportunities are then added as external links to the card).*
- The Due Date on the card is modified in function of the sign up date, last contact date, or date placed in the 'Interested For Later', 'Applied', 'Back From Exchange' lists to incite OGX members to take action and motivate the EP to take the next step in the Application Process.
- Added automatisations are conceivable in Updates, this will mainly depend on the feedback given by the users.



Specific modifications can be pushed to specific Slack channels. For example, one can push member assignments and card moves to the OGX channel so the whole OGX team is up to date on what is happening with the EPs. This must be configured manually for every LC, but is a part of the free Trello package and is very easy to set in place!

### 1.4. Manual shifts

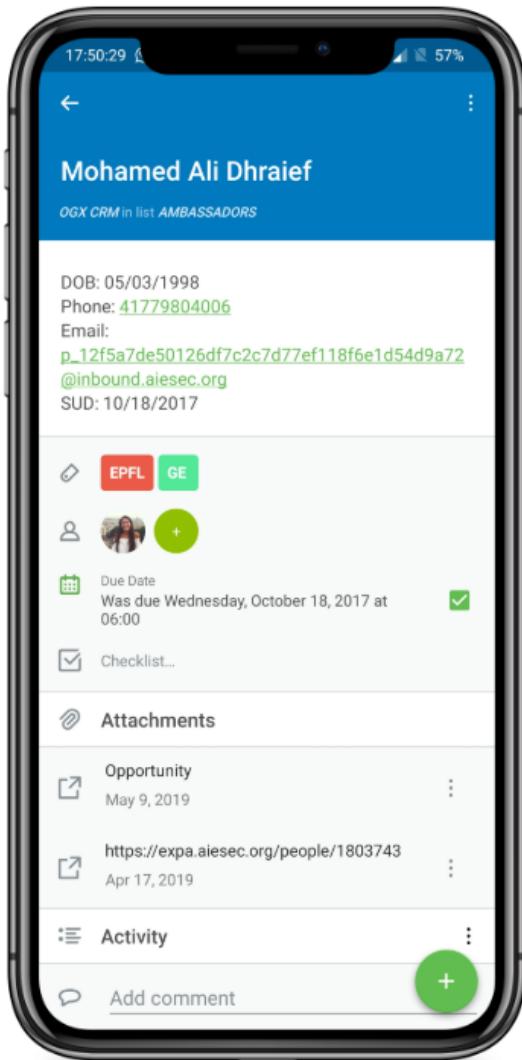
Obviously, the beauty of the Application Process is the human touch and one-to-one contact by the OGX members. Cards can be moved by dragging them from one list to another. In fact, most steps require this manual move - the program just makes the member's task easier.



## 2. One card, One EP

### 2.1. Personal Informations

All useful personal informations are kept on the EP card - all automatically pushed when the EP signs up, applies or is approved. Profile pictures are added only if the EP uploads one on EXPA, which usually happens only for GE applicants.



## 2.2. Assigning a member to an EP

The VP is in charge of assigning their members to the correct cards in function of their background, age, or personal links. This is done easily with the "Member" capability of Trello.

*Coming soon: When a member is added to a card on Trello, that same member's EXPA account will be assigned to the EP on EXPA.*

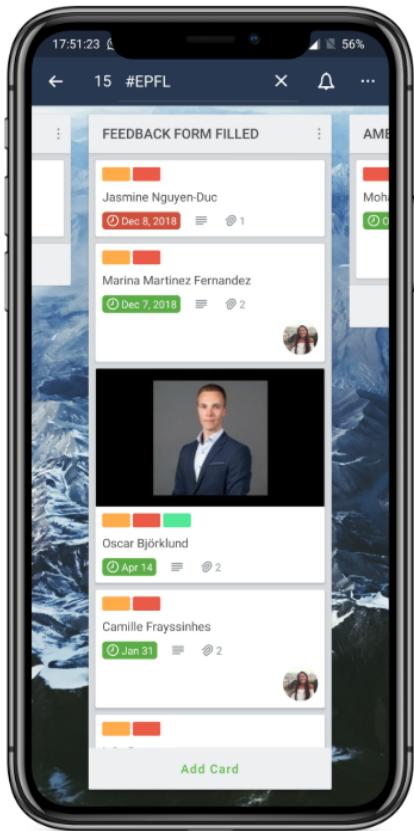
The screenshot shows a Trello board titled "helmi labidi" in the "SIGNED UP" list. A card titled "Description" contains details like DOB: N/A, Phone: +41762626202, Email: p.4bf2879ce84a856103e42ddd60c89990ffdc4e26@inbound.aiesec.org, and SUD: 11/19/2019. A modal window titled "Members" is open, showing a search bar and a list of suggested members: Arnaud Dhaene (arnauddhaene), followed by "BOARD MEMBERS" with icons for AZ, CC, CP, GD, JV, LD, AJ, FT, and M. Below the modal are "ACTIONS" buttons for "Move".

Furthermore, a member can filter Trello to display only the members that they are assigned to. As an example, here are an OGX member's 50 EPs since the beginning of their term:

The screenshot shows a Trello board titled "OGX CRM" with a search result of "50 search results". The cards are categorized into four lists: "NO ANSWER" (36 cards), "NO LONGER INTERESTED" (47 cards), "INTERESTED FOR LATER" (25 cards), and "RECONTACTED" (7 cards). The cards list names and their university or company labels (e.g., UNIL, EPFL, GE, GV). To the right, a smartphone displays the same Trello board on its screen.

Filtering can also be done for labels, dates, etc. For instance, one can label EPs by their interest (GE vs. GV) and their university.

Below is an example filtering all people from EPFL.



### 2.3. Adding files, links and comments

A link to the EXPA profile page, applied opportunities and CV is automatically added (coming soon, in the case that these exist). You can also add documents, links, checklists, and most importantly, comments. Use comments to communicate what the EP's specific interests are, and any or all other informations deemed useful by the member (for team communication inside the program, the '@' callout works on Trello to notify other members on the program).

