Carlyn's Weekly Outlook for 20200316

Routine Tasks

- Gift Entry
- Monthly reports for finance: Classy & Roundup gifts
- Letter Generation and Record Updates
- Continue basic SF documentation
- Weekly Data Cleanup
- Verify checks for finance
- Standard Salesforce Administration - adjusting settings, prioritizing requests, monitoring data entry, answering questions about record history, troubleshooting errors, assisting with reports, educating staff on interface
- Monthly reconciliation with finance

Major SF Issues to assess/tackle: [potential blocks*]**

1. Continue Client Services improvements through UI. Continue research, design & preparation for structural improvements. Establish prevention (temp if needed), consolidate sources if data is missing, perform cleanup for each.
2. Troubleshoot, redesign, and rebuild existing hard-coded components and disconnections discovered while executing improvements.
3. With new features capturing new reporting requirements, refine report generation using new features.

Assistance

- Support from leadership to verify the main pieces of information required for state reporting. Once verified, these can influence / set the stage for Operations. Then database and related reports can be setup accordingly.

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Last Week's Summary:

1. Continued to streamline date values for gifts to better reconcile with finance by updating all existing FY20 gifts for consistency.
2. Coordinated gifts with designations to Walk, Marathon, and Third Party events from various sources (Facebook fundraisers, workplaces, mailed-in).
3. Processed gifts in Amply portal awaiting action. When possible, created a portal account, gathered gift/employer IDs, verified gift was received, updated gift status in portal and Amply. Compared Amply report with dashboard.
4. Added Salesforce users for two new interns.
5. Refresher for Stacy on adding Activities for state reporting.
6. Gave Conor quick lesson on adding Activities for state reporting.

/// Additional SF/Ops issues addressed: ///

7. Monitored lite versions of internal team reports: satisfaction questions, expiring consent, direct referrals, etc.

8. Monitored for issues after rollout of Forms, iPads, Activity Unit Names, Interactions object. Answered basic questions/clarifications from case management team as they arose.
9. Monitored for issues after rollout of Service File structure and Activity Label. Answered basic questions/clarifications from case management team as they arose.
10. Continued to test draft objects and connections to better handle Tributes and Notifications from donations.
11. Designed and drafted new SF Process to create Correspondence records from donations.
12. Setup Power of One rule for Contacts, Case Records, and Activities.
13. Streamlined picklist values for Service Group field Case Service from 40 to 20.
14. Built process to automate value Contact Solicitation on when “deceased” check on Contact. Setup email alert as to remind of manual change of the Primary Contact on associated HH/Org Accounts.
15. Refined Case Reopening process by clearing closing fields (date, living arrangement, reason), adding field tracking of Closed Date, and setting up report to monitor cases closed because of deceased clients.

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Quarterly Goals
By endQ3 (mar31): 4th round of Client Services solutions complete, Certification, Report criteria cleanup, Reporting Documentation complete, Explore dashboards.
By midQ3 (may15): Gifts Documentation complete, Research Classy-Mailchimp sync and Donor-driven info updating, Brainstorm Donation-Finance flow improvements, Increased support for Finance/Ops.
By endQ4 (jun30): Admin Documentation complete, Advanced Admin Certification.