>connections

Optimizing Serving Connection Requests
From Inquiry to Application to Placement

FELLOWSHIP GREENVILLE

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⇒ History - Moving from limited, "out of the box" use of connection requests to driving most congregational connections through this Rock feature

The more FG uses Connection Requests, the more our staff has come to value the power that this feature brings. We started out simple, but since then we continue to add workflows and one-stop options for staff to be able to reach out to those who want to serve. Up to this point, Connection Requests were initiated through web-based connection request forms only, but now we use workflow user entry forms to allow more flexibility in what we ask and what we do with that information.

⇒ Need - Standardizing the processing of a potential volunteer

We needed a way to standardize on a single path for the potential volunteer to move from interest to serving no matter which area of ministry. In addition, we needed to standardize the process for staff to keep up with all the various aspects of connecting the potential volunteer capturing the actions and all communication associated with the process.

- One place to initiate an interest form and receive confirmation
- One place for staff to see when a form was completed and the next steps
- One place for touchpoints to inquiries

⇒ Solution - Use of workflows to create connection requests and provide efficient connection request activity processing

Rock continues to be the hub for all aspects of our communication with potential volunteers.

- Requirements - have one method for a potential volunteer to be able to inquire about serving and then, depending on the area of service, provide a way to follow up and track. All of this is handled through workflows that integrate with Connection Requests.
- Structure -
    - From the FG Serve Inside the Church page, the potential volunteer initiates the process of getting connected into serving at church simply by clicking "I'm Interested".
    - The potential volunteer completes a workflow webform and a Connection Request is automatically created and assigned to the correct staff member.

    - The staff member works from the connection request to follow-up and, when appropriate, sends the volunteer a serving application and background check release.
- Details of the process -
    - The potential volunteer goes to the website and selects the appropriate serving opportunity.
    - The potential volunteer completes basic information in the serving interest workflow webform and selects continue.
    - For ministries that offer observation as the next step, the potential volunteer is directed to an additional observation date-selection form.
    - The potential volunteer, based on communication preference, receives an email or text confirmation or the connector is notified via email to contact the person.
    - If an observation date is requested, the connector is notified and given the opportunity to schedule the time, location, and person to meet.
    - The workflow creates a Connection Request and the connector receives an email with a link to his/her dashboard connection request. This email is generated by a separate workflow which fires when the connection request is assigned.
    - The potential volunteer receives a confirmation of observation time, location, and person to meet and a reminder communication is scheduled to send 3 days prior to the scheduled observation time.
    - Once the observation is complete, the connector clicks a manual workflow in the connection request to send the full serving application to the potential volunteer.
    - The connector also has options to click on manual workflows in the connection request to simply send an email or a text to the potential volunteer. **All of these are automatically recorded as activities in the connection request.**

⇒ Workflow Basics -Details for creating connection requests via workflows and how to set up triggered and manual workflows used within a connection request

- Creating a connection request via workflow - the following workflow actions are available to allow the automation of all connection request creation and modifications necessary for this process.
    - Connection Request Create
    - Connection Request Set Connector
    - Connection Request Activity Add
    - Connection Request Set State
    - Connection Request Set Status
    - Connection Request Transfer
- Triggered and Manual workflows in Connection Requests
    - Since the connection request feature does not come out of the box with notifications, we created a connection notification workflow which is set at the Connection Type level to fire when a Request is Assigned or when a Request is Transferred.
    - At the Connection Type level or the Connection Opportunity level, we add manual workflow configurations to provide convenient processing of workflow actions for the Connector.

For access to the documentation of the Fellowship Greenville >connections process along with exports of our workflows, visit: https://github.com/fellowship-greenville/connections