Two Year Goals for Givetel Development

The two-year development plan for Givetel’s automation tasks. Progress on each task will be tracked at <https://givetel-company.monday.com/> with the login [jesse@givetel.com](mailto:jesse@givetel.com) and password Givetel@2021. Tasks may be added and removed as appropriate in this period too.

**Easy**

Automate Leemo’s timesheet processing.

Email each fundraiser their results at the end of each week.

Update the fundraiser progression tracker at the end of each day.

Daily summary/log of gifts emailed to QA and Coaching team each day with numbers given for records that are missing RG Amounts. Project completed 300621.

**Medium**

Detailed fundraiser performance summary for management team. Combine with Call Journey data when that platform is running.

Alerts for coaching team when a fundraiser has performed poorly (been under conversion KPI across the majority of their contacts) for two weeks or more. Could generate a PR document automatically if desired.

Link Slack API to Spotify API to create an automated office request-taking DJ to control the shared speaker. 50% complete.

Automatically pause batch months that are at contact rate (may be appropriate for warm campaigns).

**Hard**

Data input validation in Contactspace written in json/JavaScript. Inputting regular gifts should follow the financial close structure and each stage should be fully validated before proceeding to the next (ie supporter details must be validated before payment details, which must be validate before wrapping). Prototyping has commenced.

Learn database programming and create systems for updating our database with the day’s results, pulling those results from the database for further analysis.

Database views with flexible parameters to allow for quicker and more flexible reporting on data performance, fundraiser performance and other performance based insights (ie statistical quantification of the effect of attempt count or call time on conversion).

Live results scoreboard that’s accessible through a secure online domain, allowing fundraisers to login. This system should also be gamified in some way to reinforce exceeding KPI rather than hitting it, fixing campaigns on Thursdays and giving the job proper attention.