Daily Processes

AS OF 07/05/2024

Daily Breakdown

Morning to Lunch – Cases (8:00 -12:00 Tues-Thurs, 8:30-12:30 Mondays)
- 50 Cases is the average

Lunch to 1:30 Return Mail
- 1 hour, aim for 60-70 pieces of mail

1:30 to 3:00 – Review with Tiffany

3:00 – 4:15 – Finish Return Mail
- Same goal, should have two large stacks completed by EOD

4:15 – 4:30 – Write out daily summary

*Address audit would have taken the final 3:00 onwards slot, however that has been de-prioritized due to the seasonally high return mail volume for the past month

General Rules

Delete something ONLY if it should never have been on the record in the first place – *99% of changes are formering data, NOT deleting*. If you're not **100% sure** something should be deleted, then it should be former'd

- Having a data history is sometimes even more important than the data itself, particularly when corrections are needed. The above includes data that has been formered.

Presidential Standard is King, ALWAYS follow the layout, as almost every address correction (when an address is updated for typos, not a new address) is due to violating the Rules of Presidential Standard.

Use the resources at your disposal, both human and online searches (LexisNexis). You will absolutely encounter unfamiliar cases, gather the information you can and refer to your training partner before attempting something you're not sure about. Verify whenever possible!

Use your logic! Requestors and the cases themselves have expectations to follow our business rules. If something does not line up, or there is a disconnect, ask "what is this case trying to accomplish?"

All records must have AT LEAST one piece of contact information. Whether it is an address, phone number, email, or website (The last is only for Businesses)

Always include a source for your information, for data history purposes.

Update Types

- Email & Phone Updates
- Address Updates (Home, Business, Campus)
- Relationship Updates
- Deceases
- Duplicates
- Name Updates
- Degree information
- Involvement Codes
- Service Indicators
- Birthdates
- Constituent/Org Creation
- Assignment (RMATS)

Email & Phone Updates

Generally the simplest to complete

Usually includes formering an out of date email address or number in favor of an updated one

Keep an eye on the constituent type, you will frequently see alumni with campus emails or phone numbers that should be former'd even if they are not specifically mentioned. Alumni should have alumni contact information, if available, not campus (campus is ONLY for current students)

*Some constituents can be an alumni and a current student (graduate degrees, for example) if you see current student on their profile, they are allowed campus contact information

Make sure they are formatted correctly – one example is phone numbers with area or country codes, if it is a standard 10 digit, then it should look like this: (123) 456-7890

Pay attention to the contact information type! Constituents can have a preferred home number AND Business email, look for the checked box on cases as they come in to be sure you are updated the correct piece of information, and ALWAYS verify after you update.

Address Updates

Most important rule to remember is Presidential Standard Formatting:

- The numbers 1-10 are spelled out (one through ten, **not** 1 through 10)
- Apartment and Unit numbers go in address line Two
- Get the full, 9 digit Zipcode whenever possible, i.e. 12345-6789, instead of 5
- Capitalization, **and abbreviations are never used.** St instead of Street is one of the more common updates you will see, along with Ave, Pl, Dr – all of these should be spelled out for the full word.

Like Email and Phone updates, you will also see Campus addresses that no longer apply to pure Alumni. Follow the same rules for campus address information as you would for any other contact information.

Pay attention to the address types, for Business for example, you are expected to include which business this address is for in the dropdown on the right, even if there is only one business relationship

Have the Active/Inactive dropdown in your sights at all times, if an address is not complete, and thus not able to receive mail, it must be marked as inactive

Relationship Updates, 1 of 2

All cases from this point forward require corroboration from your training partner, due to their complexity.

Relationships include both Occupations (current and past) as well as familial relationships.

The two most common updates by far are **Employers & Spouses**, but can also include siblings, children, grandparents, etc.

For Spouses: Make sure you update the marriage status for **Both** under the additional information tab. Also be sure to include any additional relationships from one constituent to another. For example: If Bob and Sue are married, and Sue has a sister Becky listed, Becky would be added as Bob's Sister in Law. Siblings can similarly be linked when relationships are confirmed between each other. This is a great example of where and when logic comes into play.

If you are creating a constituent without any contact information (which would be against our business rules) who has an existing spouse, that is an opportunity to use the spouse's address for the created constituent, if you cannot find an address or contact through searches. This is a last resort before emailing to ask for additional information.

Relationship updates include separations & Divorces, make sure your wording is correct as the dropdown has the option for both. Update the relationship type to ex-spouse or ex-partner, and the marriage tab under additional info.

Just because spouses are linked does not mean children can be also! Remember Step Parents are always a factor. Children must be linked based solely on their relationship with the specific constituent, not a familial link.

Relationship Updates, 2 of 2

Employers, like constituents, must have a separate CRS ID, which can include creating one when they are not pre-existing in the system (See slide 16 for more information)

Make sure you have appropriate start and/or end dates, these can generally be found on Linkedin if the requestor does not include it. Always do a quick search to make sure you are getting the most accurate information possible. The type of relationship should almost always be employer (Unless you are adding a Consituent to a business, in which case it would be employee-however this amounts to the same thing in the constituent record), with the position box to be filled with further details.

- Make sure the positions are spelled out! For example, Chief Executive Officer, not CEO

Organizations should be listed by their appropriate type – most common is corporation, however Foundations are second. There are many other types that need to be verified before adding them. You can look up or verify a foundation, for example, by seeing if they have an EIN number online.

Be sure to include the Linkedin Profile on the Social Media tab if you can confirm it is the same constituent! This is easier for Alumni, as they will almost always have USC listed on their profile, but can also be confirmed with any overlapping information.

Information on a Business can usually be found through online searches. Make every effort to fill as many tabs as possible, even if not specifically requested!

Deceases

Deceases will almost always require verification

- The ONLY time you can complete one without confirmation is if a family member has contacted the requestor to tell them the constituent has passed. Even then you should usually be able to verify via one of the two below methods.

Confirm the DoD(Date of Death) with either an obituary or Lexis Nexis search, ideally both. This would also be an opportunity to include a birthdate for the constituent, even if not specifically asked for. Remember that just because they have passed does not mean we don’t want all the data we get.

Update the Deceased section under the Additional info tab with the Date of death, and include the case Number as the source. In the case itself, link either the obituary page, a screenshot on Lexis Nexis, or preferably both.

If the constituent has any relationships, they will be affected. A spouse will become a widow, and the spouse would have an updated relationship – to deceased spouse. This usually happends automatically after a day or two, but do it manually just to be safe. Naturally they would no longer work if they were employed, and that relationship should be former’d. Use the DoD as an end date if you cannot find information about their last day online.

Duplicates, 1 of 2

Duplicates are arguably the most complicated update type.

First step is to always confirm which is the “master” record, and which one is the duplicate. The Four methods of verifying this are as follows, in descending order of certainty:

- A “true” under user access portal, indicating that it was accessed
- A history of giving (Frequently both records will have a history, in which case you can prioritize the one with a greater history)
- Degree Information – this requires extra steps to add or verify, so it is less likely that it would have been added to the incorrect record.
- CRSID and overall data availability – One record had to have been created before the other, the older record would take priority as a LAST resort, but usually you can verify via the completeness of the data, particularly Identification numbers, such as student ID (search that Id on Salesforce for Verification, usually you can find a related interim).

Duplicates, 2 of 2

Step 2 is to ensure the Master record has all the data of both records, this includes former'd data, so make sure you check!

Once steps 1 and 2 are completed, do not mark as update complete *unless* there are no gifts to be moved. If there are, use the sub-status on the case to mark it as "Pending Duplicate" instead, to give the gifts management team time to move the history over.

Name Updates

Name Updates also include Prefixes (Mr., Mrs., Ms., Dr.) and Suffixes (Esq., Jr., III)

Most commonly name updates are due to marriage, in which case the old name should be kept as a Maiden name (Do not mark as former for marriage alone, it is rare for name types to be former, and usually applies to legal name changes or personal preference). This is not intuition based, it must be explicitly stated that the old name is a maiden name or the change is due to marriage to mark it as Maiden.

Remember that marriage usually includes updating the prefix as well, to Mrs., but this is only the case if the last name of their spouse has been taken. If it has not, they should still be Ms.

“Miss” should always be corrected to “Ms.”

Legal or “Westernized” name changes are fairly frequent, remember that a “Legal” name should match whatever is on a passport, or official documentation. “Westernized” names include students who have a Legal name, but prefer something more common. An exampled would be a student with the Legal Name Qi Xiang, but prefers “Serena”

Whatever the preference is – Full Name should be chosen from the dropdown, with an accurate history outlining any name changes, and the sources behind them. Remember, if you look someone up by a “former” name, they should still be found.

Degree Information

Degree information verification will <u>always</u> include corroboration from Lena. Be sure to include a case comment when verification is needed, addressed to Lena, using the appropriate format.

Degree changes are <u>NOT ALLOWED</u> to be made by us, they <u>MUST</u> be verified by the Alumni team

Degree information is generally used by us to establish dates, and history for a constituent – for example when they graduated, or what their degree was in. You can use this to verify information found online, such as LinkedIn profiles.

Involvement Codes & Service Indicators

Involvement codes outline which Societies or Alumni Groups a student or Alumni is, or has been, a part of. Make sure the start dates and sources are included, as well as end dates if the association is former.

Service Indicators include a constituent's contact preferences, such as calling, email, mail or texting (The last one is new, and almost never used as of now)

- The specific codes vary based on the giving history of the constituent, make sure you check before updating anything. For example: Do not mail and KECK Do not Mail are very different. This applies to all service indicators outside of the core Ten, which are used non-area-specific contact requests.

Birthdates

Birthdates are fairly straightforward. Add the dates as they are requested, but make sure to verify whenever that is an option.

Occasionally, you may get a Month and Year with no Day attached. You should always check to make sure that information is truly unavailable, as about 80% of the time you can find it online. If it is truly not available, use the placeholder 1 as a day until updated.

Only use the “actual birthday” check box when you have a complete, and accurate, date of birth

Constituent/Org Creation

Make sure when an org is created you have <u>at least</u> one piece of contact information available to you. These can also be found online if needed.

All business rules apply, make sure you are checking any relationships for additional relationships that can be added, a record can <u>never</u> **<u>ever</u>** be bare.

Update the case itself with the new constituent ID (Under NEW) after creating it.

One difference between organizations and constituents is the available information to be added. Constituents have an email slot but no website slot, while the opposite is true for Organizations.

As always, you are not limited just by the information included in the request. Find what you can online about either, and add all you can after verifying.

Assignment (RMATS)

When you see the “Request for Assignment” box checked in a case, it indicates you should move it along to another department. Most of the time this is going to go to RMATS.

PCO’s and DCO’s are some of the changes that need to be made for these cases. PCO stands for Primary Contact Officer, indicating that they are the contact point for a business, or constituent. DCO is fairly similar (Designated, not Primary) but amounts to a similar role. Make sure constituents and businesses have marked (Checked-marked) boxes before forwarding them.

Forwarding these cases includes adding “Please Forward RMATS Request for Asssignment”, with the occasional PCO or DCO specified within the case itself.

Review Meetings Layout

When meeting with Tiffany we review cases in the order of how old they are, generally we go through them one at a time, occasionally pausing if there is an inconsistency.

We recently updated our process upon request, where I do not send anything to her beforehand, and we review all cases in person (or via huddle). Our review goes through the core components of the case, and then the rest of the record to check if anything needs updating.

It was also recently requested that any and all name changes are only performed while speaking with Tiffany, in front of her.

Cases are marked as update completed upon successful review, or after any requested changes are made. Occasionally we include a case comment for the circumstances that require them, instead.

Return Mail Process

Return Mail is fairly straightforward as a type of address update

Mail comes in with incorrect address information and needs to be former'd, and occasionally updated with the requested new address, or marked as deceased.

Searching the name of the constituent, the address is verified ad evaluated, and Presidential standard changes are made, if necessary, and the address is former'd. Make sure to mark the source as "Returned Mail"

If a new address is added, all address change rules apply (see slide 6).

You will occasionally find campus addresses included for Alumni, these can and should be former'd, with the source marked as "Data Integrity"

Aim for around one envelope a minute, these should be fairly fast.

Address Audit

This spreadsheet includes a substantial list of addresses that have deviated from presidential standard.

Most commonly, Unit and Apartment Numbers are not on line 2 as they should be, however abbreviations are also a key issue.

Similarly to return mail, keep an eye out for campus addresses that don't match the constituent type, and former them when needed.

These should be similar in speed, if not faster, than return Mail. You have the CRSID's on the spreadsheet, so that saves you some typing. My average for the address Audit is 44 Seconds, though of course that will vary if campus contact information needs to be addressed.

Overall Takeaways

Tracking your data history is key to success here, make sure information is not added, or deleted, recklessly. Verification is Fundamental to our department. <u>ALWAYS</u> include sources

Pay attention, almost all mistakes are made from going into "Autopilot", think before making any changes.

Use the resources at your disposal! Both people and applications – there is a lot of knowledge and data our there. Use it whenever you can, and ask questions!