Figure 1: Source: igtbok.org

Report of Findings

CLIENT IGTBOK Salesforce.com

ABSTRACT

IGTBOK is a non-profit organization that aims to enhance their existing capabilities. This report contains the findings of the organization that have been made during the requirements discovery meeting. I have worked in the process team during the “It’s going to be okay weekend”.

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Contents

Table of Contents

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Document Overview

Purpose and Scope

The purpose of the Report of Findings (ROF) is to document and gain consensus on the information that was gathered, business processes which were reviewed during the Business Process Review sessions. This document lists the Business Processes and Functional Requirements discussed during the Discovery sessions. This Report of Findings details the complete set of Requirements communicated by IGTBOK to T-Digital. The scope of this document is to only outline the information gathered and not contain any in-depth technical details. This is also not a requirements gathering document but only an information gathering document.

Company Overview

It's Going to be OK is a, non-profit organization's whose mission is to provide the emotional support required for individuals who have been victims of human trafficking. They provide not just emotional support but also other kinds of services including counseling of the victims to help improve their mental health, providing any financial aid that will assist these victims, and investing in educational programs to help the victim's future. They also aim to foster an environment that enables the victims to feel secure and safe and be cherished by focusing on empowering these individuals and building up their confidence and resilience.

Project Goals & Objectives

Project Goals

- Provide It's Going to be OK with enhanced tracking capabilities of their victims
- Show quantifiable results to their doners and provide information on how their money is being spent
- Help create a system that can track the inventory of donations that the organization receives

Project Objectives

- To automate the intake form of victims
- Create a database of all the victims and families recued
- Audit and track Donations
- Auto generate tax bills for donors

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Project Assumptions

MIS6378-CLIENT Project Assumptions	
NPSP pack of Salesforce will be implemented	The NPSP package of salesforces is a which provides customized functionalities to non-profit organizations. The package helps organizations to manage donors, fundraising, volunteer management etc. The organization already has 10 licenses of this org and we will be utilizing the same for implementing the project.

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Executive Summary

This document aims to capture all the information that has been gathered about It's Going to be OK organization (IGTBOK) during the Discussion session between IGTBOK and TDigital. In the discussion, the key pain points that the firm is facing have been highlighted and also the organizations operations were explained in more detail. Using these details, we have Identified the following things:

1. Most of the intake forms that the organization uses are in the form of physical documents
2. There are different intake and out take forms
3. Most of the opportunities the firm gets are through phone or the law enforcements
4. Forms are filled while talking on phone
5. There is no database for victims that the organization has been helping
6. No tracking tool is present to check the inventory of donations
7. No set accounting process is in place to be implemented
8. Tax receipts to donors are not generated automatically

Process Management

Opportunity Management

The organization gets their opportunities from one of the following sources:

1. Website
2. Phone
3. Law Enforcements

Lead Management

After obtaining the leads from the above-mentioned source in the opportunity management, the organization first tries to provide the emergency services required to bring the victims to a safe place. After that they victims come to the organization their details are taken onto an intake form.

Account Management

After filling out the intake form, the victim is assigned to one of the 4 cases managers. The case managers take the victim through a series of steps:

1. Perform a medical assessment on the victim
2. Analyze their mental condition
3. Assist in providing counselling to the victims
4. Identify the victim needs

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5. Post-Graduation Checkup
6. Closing Case

Data Security

The data that will be uploaded onto the database must be protected. This can be done in several ways in salesforce.

Also, we can place 3 level security on the data present in the org. These are:

1. **Object Level Security:** This is the security place on the object level (Account, Lead, Opportunity etc.). We can implement object level security on the data through:
   a. Profiles
   b. Permission Sets and permission groups
2. **Field Level Security:** This is the security placed on the fields read write permissions that are as part of the object in salesforce.
3. **Record Level Security:** Also known as the salesforce sharing model. This allows for sharing of record at an organizational level. This can be implemented in 3 ways
   a. Organization wide sharing
   b. Role Hierarchies
   c. Sharing Rules

We also Define our user profiles based on the discussion as follows:

1. **System Administrator Profile:** System administrator has all the access to the records.
2. **Intake Profile:** This profile will only have access to the data related to the intake process.
3. **Accounting Profile:** This profile has access to donor financial data
4. **Change Manager Profile:** HA access to medical forms and case data and victim data

It is critical to know the different levels of security measures that we can implement in Salesforce to configure data permissions for the roles that we have defined above.

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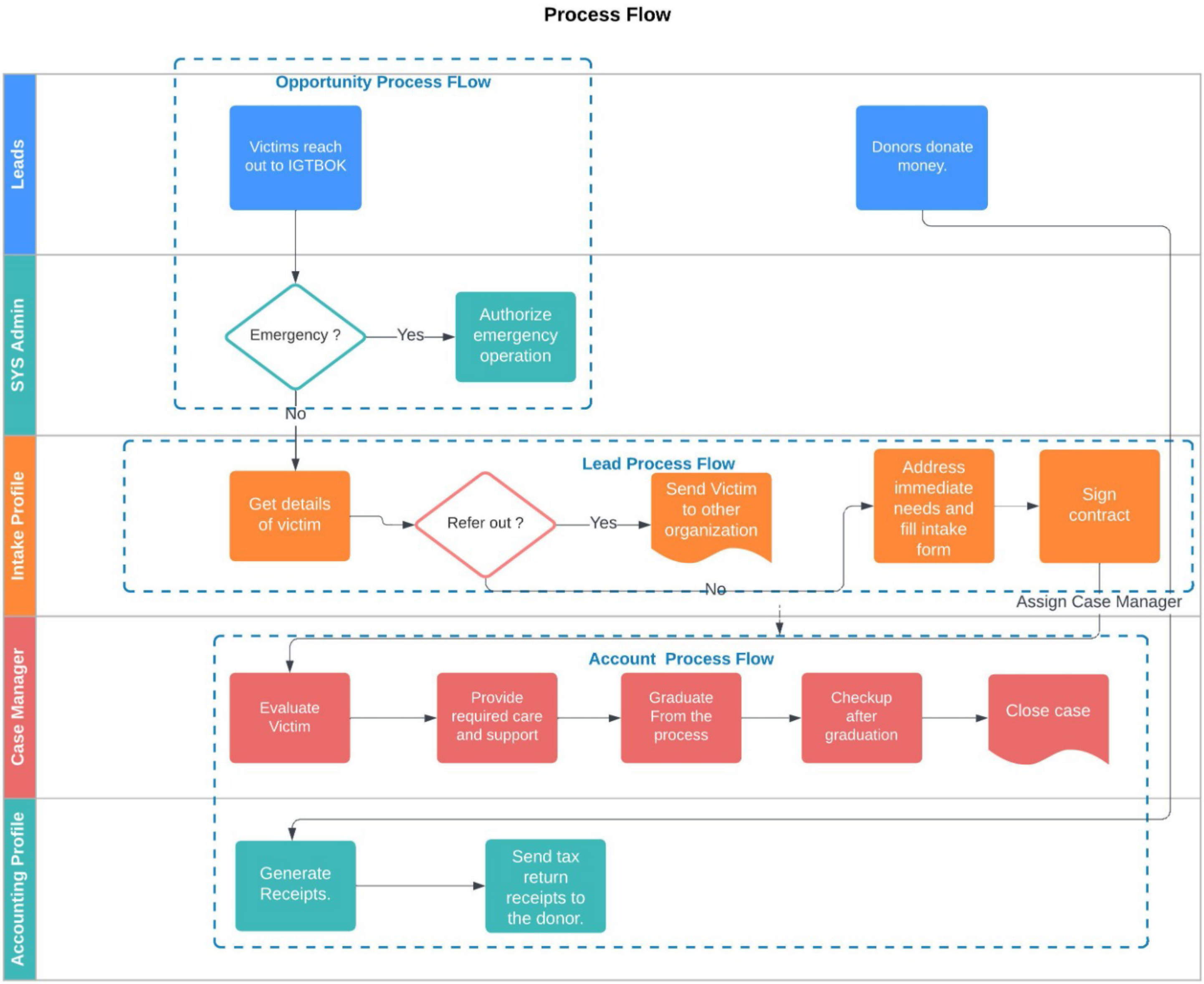
Process Flow

We will be defining the process flow of the provide processes mentioned in the executive summary with the below image.



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We will be defining the Requirements for the 3-process flow below:

Opportunity process flow requirement

1. Ability for volunteer to receive the call from the victim.
2. Ability to record the initial contact from the victim.
3. Able to provide emergency assistance to the victim immediately.
4. Get all the information from the victim after the rescue.

Lead Process flow requirement

1. Ability to get complete details of the victim to be able to perform evaluation.
2. Able to provide victim with care either in house or refer out the client to other organizations which can better provide for the client.
3. Ability to address immediate needs of the client to be able to recover.
4. The client should be able to fill out the intake form, which can help client to address their needs.
5. Ability to sign a contract with the client.

Account Process Flow

1. Ability to evaluate clients on their mental, physical and financial conditions.
2. Ability to cater to the client needs based on the evaluation.
3. Monitor the client progress and needs and support them through the process.
4. Client should be able to graduate from the programs after 2 years of success in the program.
5. Ability to monitor the client progress even after graduation.
6. Close the case of the client if there are no issues after follow-ups.

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