**Attendees:**

* **IUCG: S**pencer Friedman, Meredith Greayer, Sankalp Koripalli, Selvana Abdelmesih, James Stevens
* **McKinsey / BBBSEM:** Jesse Victoroff

**Synopsis:**

* Jesse worked closely with the recruiting team on 1. how they recruit and 2. bring in new people
* Changes were:
  + BBBSEM is going to be much more company specific (big opportunity firms)
  + Backend: Converted forms from FormAssembly to FormAssembly workflow for easier understanding which doubled conversion rate
* Little Process: some interviewees don’t show up to interview – wasting resources
* Only Terry and couple others only have access to Salesforce Flows
* If needed to change type of inquiry, it has to be done manually

**Potential To-Do's to Consider:**

* Research Zapier to connect Acuity updates to change the type of inquiry for flows on Salesforce
* Content and triggers need to be checked in new Salesforce flows
* Best Practices: Every Enrollment Coordinator should know about the flows (content and structured set-up)
* Make sure all interviews set up are all connected to the 60-minute pilot flow not 90 minute one
* Find ways to make sure interviewee’s show up to interview through clearer instructions in email

**NOTES:**

* He worked in backend for forms (FormAssembly ) - old school - not good user experience - people in BBBSEM not used to using it
* Backend
  + Forms and comms
    - For forms, use formassebly
    - Very old stuff and very few people know how to use it
    - Converted the forms from formassembly to formassebmly workflow
    - Added backend instructions on how to change
    - Doubled the conversion rate
* Automated Comms
  + Similar to prob with formassembly using an old version of salesforce Workflow
  + Moved to new salesforce flow
  + Two big probs solved
    - Cumbersome to edit
    - Content of the email was super outdated for COVID
  + Content and the triggers need to be checked
* When there are code problems, they bring in Terry as he is the only person to fix - not best practices
* Moved code to visual basis to make them simple to understand
* They have double the conversion rate - there is intersection of form and communications

Little process

* They waste resources on littles that don’t show up for virtual meeting
* Email going to the little family
* People may say that they will sign up for interview - and people don’t show up
* Maybe make a clear link to sign up - make it clear that they have and interview
* There is so much work to be done to fix Salesforce Flow before moving to FormAssembly
* There might be thing which can solve problem of Aka's -

After match - they meet with their program support people - making

* Their volunteer interview minute changed from 90 --> 60 minutes called 60 minute pilot
* Make sure 60 minute pilot is the only one which is selected not the others because then it gives them wrong communications

Spencer: Is it valuable to screenshot/show the flows visibly to BBBSEM ?

Jesse: Yes, every enrollment coordinator should know what the flows are and how they operate

Sankalp: Are there any roadblocks/ issues we might face while working with BBBSEM which could help us prepare in advance?  
Jesse: Low Capacity - so be really prioritized and tie it to value to volunteer - make it ridiculously easy