Client Call 09/18/2023

*The purpose of these initial questions is to gain a comprehensive understanding of the communication flow throughout the entire mentorship matching process. We want to understand the current tools being used, how they’re being used and identify their design flaws and inefficiencies.*

**Pre-Interview – First Contact (Meredith)**

1. **What process, tool and resources are used to assign an interviewer?** 
   1. Acuity is the gtool used here, this is the scheduling tool
   2. They have put in their hours and limits for each interviewer
   3. This includes specific links for specific programs, then goes to the next person who has openings for that time
   4. This is pretty segmented by program type, site and region
2. **What steps are taken internally after a volunteer schedules an interview?** 
   1. After interivew is scheduled, they have to go in salesforce to book the interview MANUALLY
   2. Change the status and communications are sent out
   3. Volunteer receives email with interview info and forms to fill out
   4. They also get subsequent texts and emails
   5. Depending on how far out someone is booked, they’ll get more communication

**Post-Interview – Internally Matching (Sankalp)**

1. **What kind of data is collected during the interview, where is it stored, and how is it used to make matches?**
   1. Each record in the salesforce system is a potential candidate, the data is submitted into salesforce record
   2. Minimum 3 reference checks
   3. During interviews process, they’re screening them – everyone we move forward with, we collect their preferences
   4. They manually match the mentor and mentee
2. What is the turnaround time between when a volunteer schedules an interview and to finding a match?

**Outreach Process (Sankalp)**

1. **What does the current post-interview process look like and which platform is used to notify the volunteer? How is the Little notified?** 
   1. Use salesforce automations. Salesforce will push an update to volunteer candidates on a weekly basis
   2. It's not smart enough to tell them what’s left in the process – this works well tho
   3. Staff is responsible for keeping communications
2. Which templates are used for these messages/notifications?
3. What is expected from the volunteer after they receive a notification about their match?
4. Who is expected to initiate scheduling time with the Little and the Big after they have been notified of their match? How are they put in contact?

**Understanding Tools (Selvana)**

1. **What difficulties did you encounter while utilizing Salesforce workflow, what was resolved and what wasn’t through the transition to Salesforce Flow?**
2. **Why did you decide to implement Mogli SMS? In which part of the process is this tool used?**
   1. **What challenges and advantages has it offered?**