19 NTC

FIREFLY PARTNERS

Pet Partners®

From Front to Back: Integrating Your Website and CRM

March 13, 2019 #19NTCfront2back

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Link for collaboration notes:
http://po.st/front2back-19NTC

FIREFLY PARTNERS

Pet Partners®

Introductions

Who We Are

What We Do

Why We're Here

About Firefly Partners

Firefly Partners specializes in creating tailored digital solutions for progressive nonprofits. We work in partnership to design beautiful websites, integrate platforms, create effective emails, and optimize digital tools to help organizations achieve their goals.

About Pet Partners

Pet Partners®

Touching Lives, Improving Health

Together we can improve human health and well-being through the power of the human-animal bond.

Session Goals

- Understand the basics of website => CRM communication
- Highlight the benefits to nonprofits
- Show case studies from Pet Partners and other organizations to provide real world examples (and check out some bells and whistles)
- Answer your questions

Why Integration Matters

Better website user experience

- Personalization
- Interactive features
- Self service portals

Better Data Management

- Accurate data empowers you to make better decisions and achieve your mission
- Real time data creates more opportunities
- Operational Efficiency

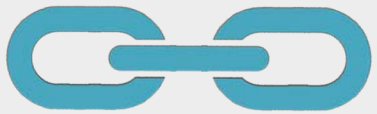
Part I: The Basics

"Firefly's role in this partnership was to make technology improvements that would change things for Pet Partners day-to-day and help them achieve their mission."

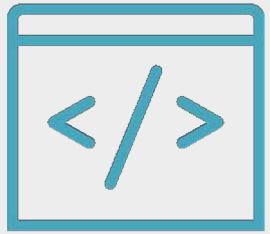
Terms and Definitions

- Your CRM is your Customer Relationship Management system, which allows you to track constituents and how they interact with your organization.
- API stands for Application Programming Interface. In the most basic terms, an API is what allows applications to talk to each other.

Approaches



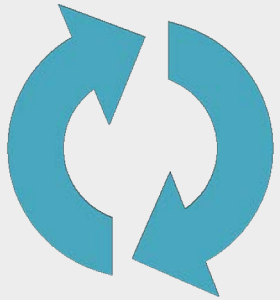
LINK



IFRAME

PUSH

PULL



TWO-WAY SYNC

Understanding APIs

Imagine a wall of post office boxes. A worker needs a little door to move mail through the wall into each box so someone can receive it. An API is like the little door because without it, you can’t move anything through. Technologically, if someone writes code to make the little door, information can get through.

Part II: The Pet Partners Challenge

"If someone wanted to apply, we didn't know their intent until they'd gathered everything they needed to start the process. We knew that if they could go online we could scoop them up early so they wouldn't get frustrated or quit. Without that, we would never know they existed."

The Old Way

- Handwritten and mailed volunteer application process
- Turnaround time = six to eight weeks

Issues

- Staff time and capacity
- No understanding of process abandonment
- Reporting challenges
- Data hygiene

Part III: The Process

"Having discovery was critical because nobody knows our business case better than we do, and even we didn't know all our use cases until we started. We recognized that there was no off-the-shelf software for tracking 10,000 animals and their humans."

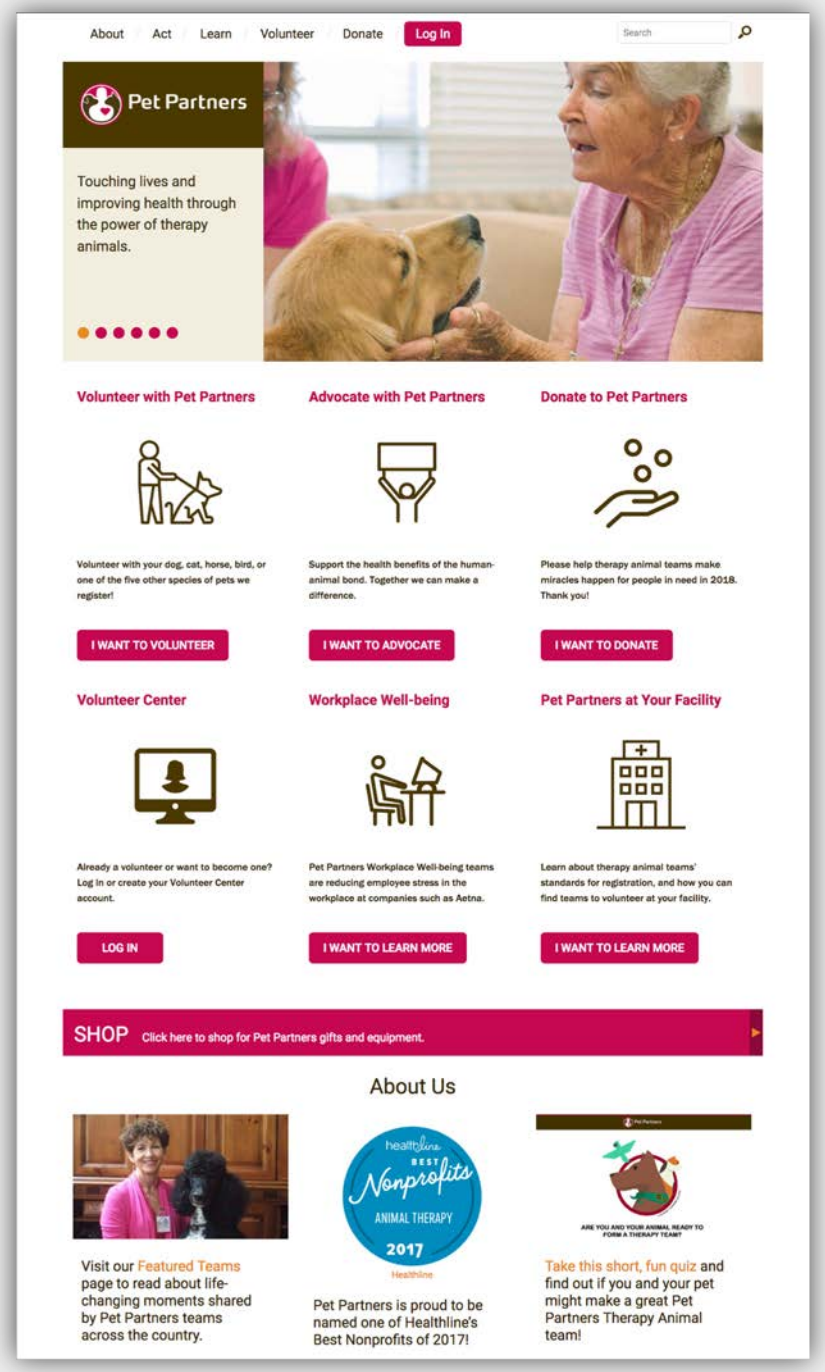
Project Phases

- Discovery
- Initial move to online processes
- System improvements

Part IV: The Solution

"As a nonprofit, we're trying to demonstrate impact. Not all 13,000 volunteers will log their visits, but enough will that it gives us a sense of where people are volunteering, for how long, and how many people they see on average. That helps us estimate the impact of our work with donors and supporters."

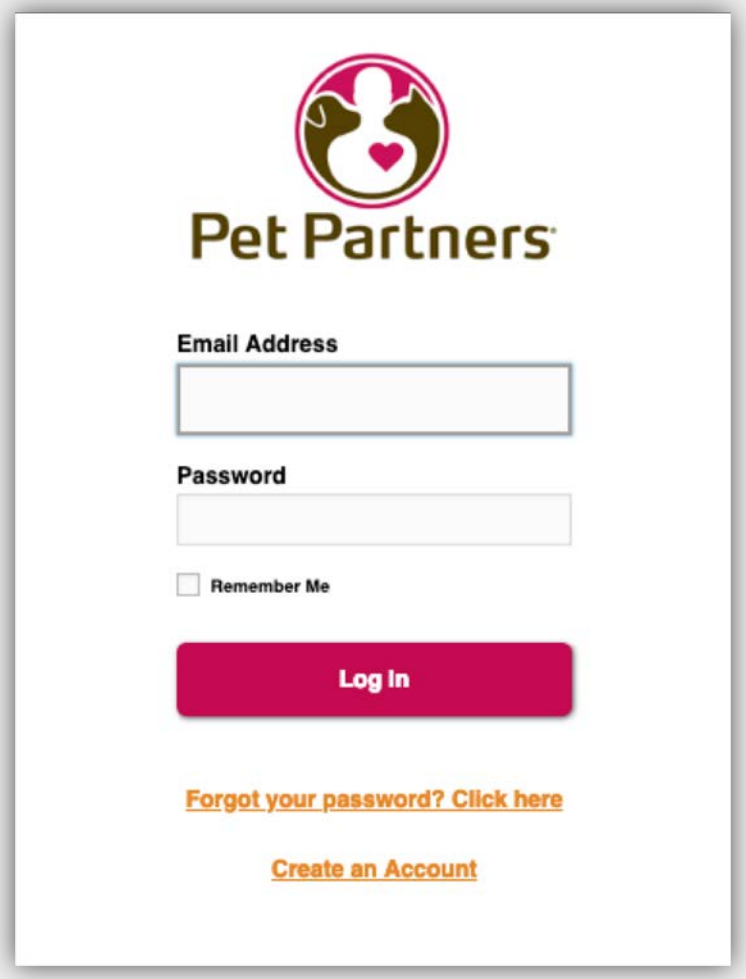
Let’s Take a Live Tour

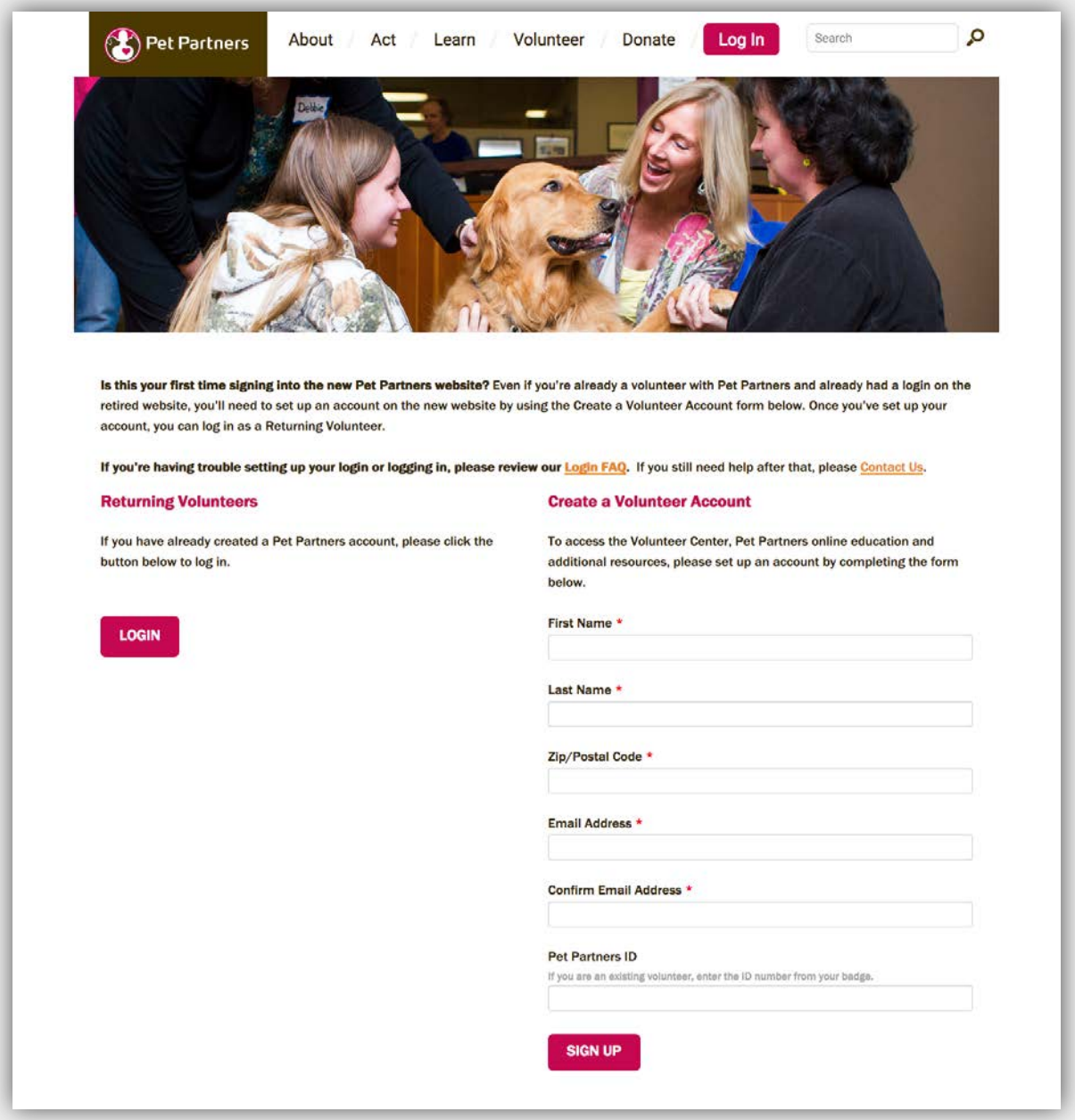


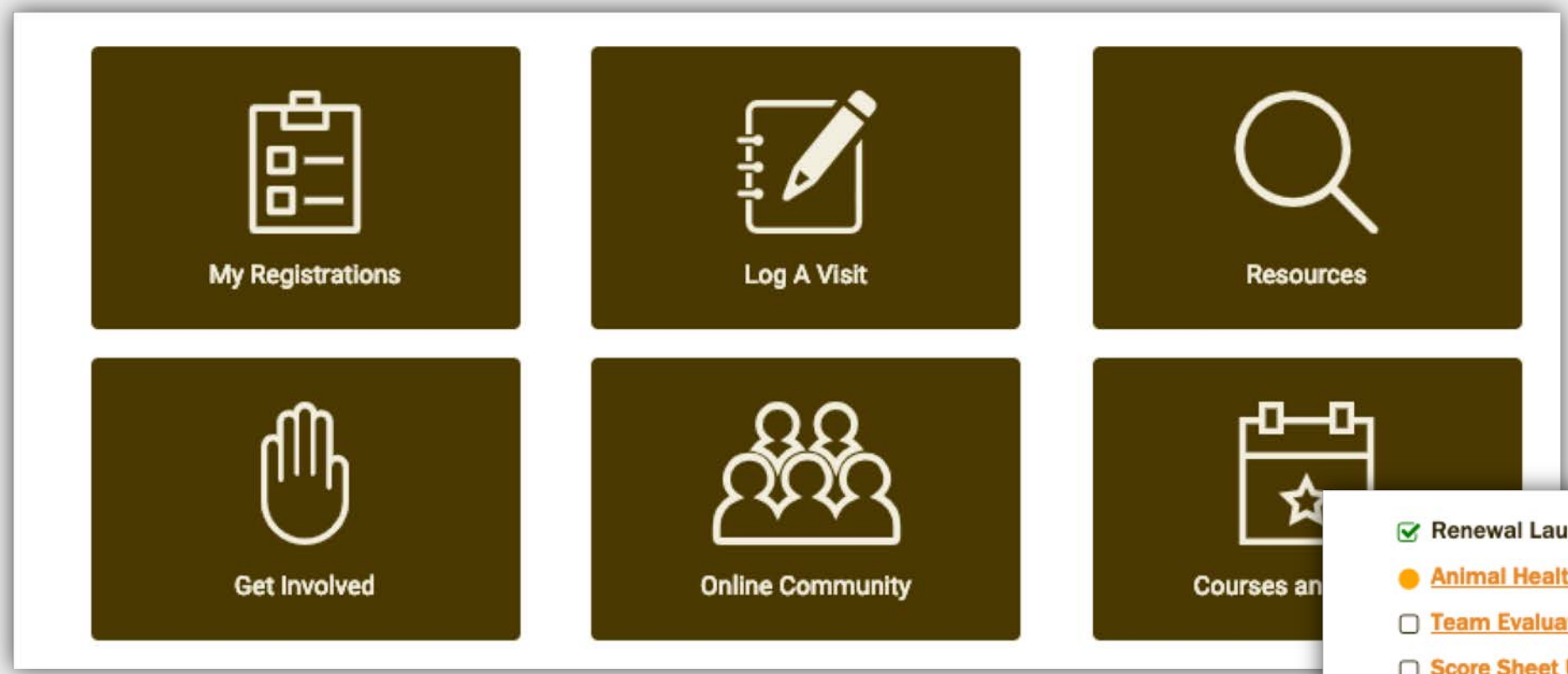
Pet Partners Website + CRM

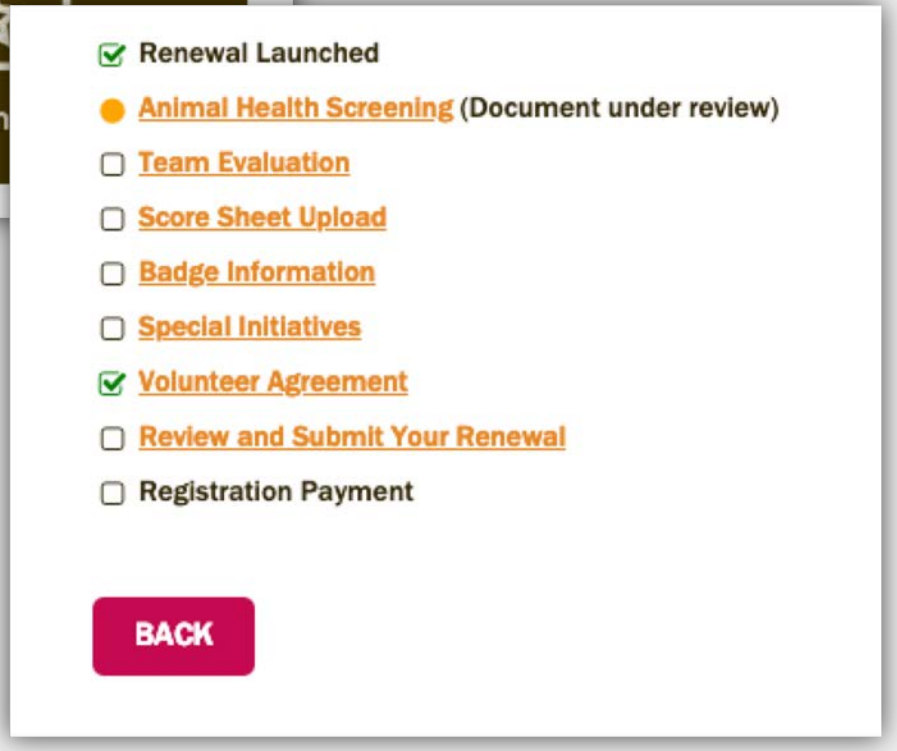
WordPress + Salesforce

Register or Log In









Volunteer Center + Status

Search and Summary

By Name:

Organization Name

SEARCH RESET

By City/State:

City State/Province

SEARCH RESET

By Zip/Postal Code:

Zip/Postal Code

Distance

10 miles 25 miles 50 miles

100 miles Other

SEARCH RESET

Visit Log Summary

March 11, 2019

This Year's Visits

- Number of visits (count): 0.0
- Hours visited (sum): 0.0
- Mileage (sum): 0.0
- People visited (sum): 0.0

Last Year's Visits

- Number of visits (count): 3.0
- Hours visited (sum): 2.0
- Mileage (sum):
- People visited (sum): 29.0

Total Logged Visits

- Number of visits (count): 3.0
- Hours visited (sum): 2.0
- Mileage (sum):
- People visited (sum): 29.0

DOWNLOAD VISIT SUMMARY LOG

Website + CRM Improvements

- Online application submission and tracking
- Content and resources based on volunteer type
- Supporters can log volunteer hours and update profiles
- Accurate and clean data

Operational Benefits

- Reporting to help demonstrate impact
- Knowledge of process abandonment
- Data hygiene
- Happier and more efficient staff
- Deduplication
- Identify (and re-engage) inactive contacts
- Segmentation

User Benefits

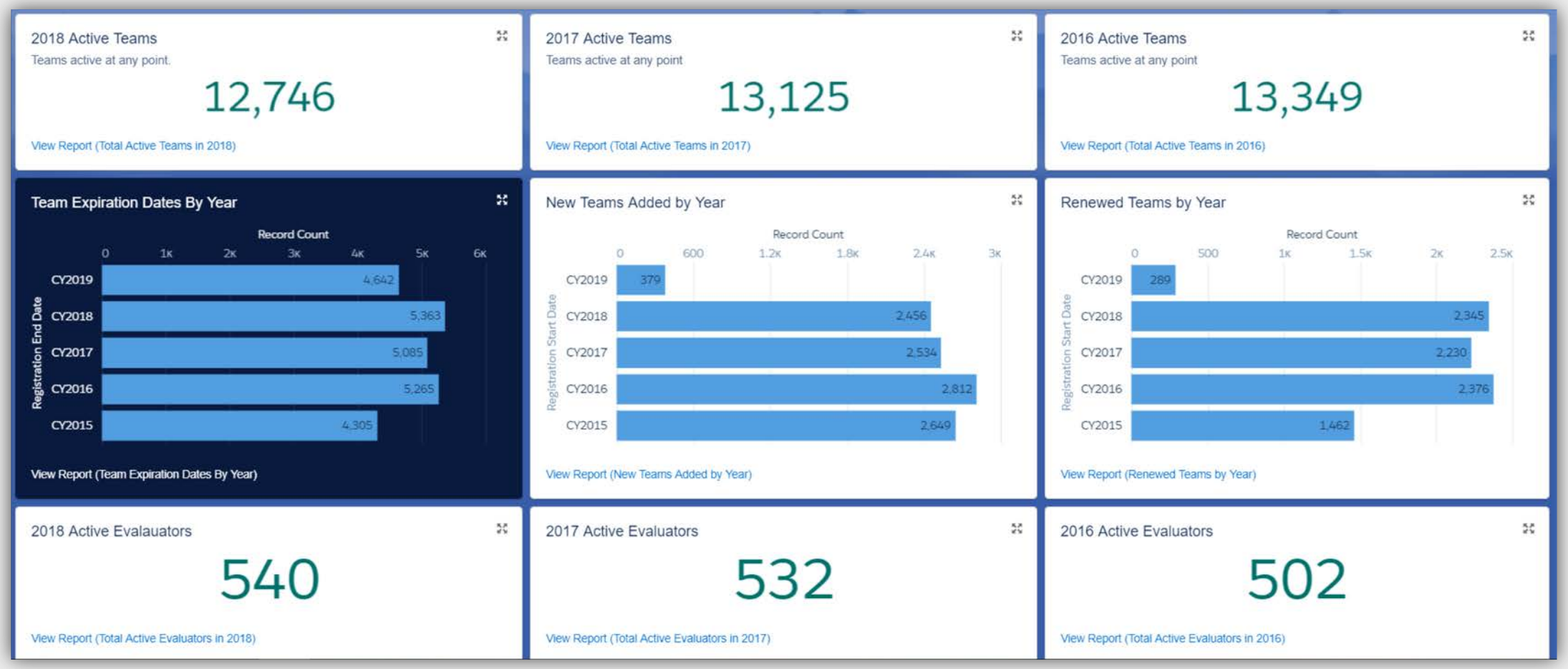
Personalized experience for registration, volunteering, account management, and updates.

Using Custom Solutions

- Resources to fix tools when necessary
- Adapting entire process when adding new features
- Training, documentation and change management

Part V: Reporting

Dashboards


2018 Active Teams
Teams active at any point.
12,746
View Report (Total Active Teams in 2018)
2017 Active Teams
Teams active at any point
13,125
View Report (Total Active Teams in 2017)
2016 Active Teams
Teams active at any point
13,349
View Report (Total Active Teams in 2016)
Team Expiration Dates By Year
Record Count
0 1K 2K 3K 4K 5K 6K
Registration End Date
CY2019 4,642
CY2018 5,363
CY2017 5,085
CY2016 5,265
CY2015 4,305
View Report (Team Expiration Dates By Year)
New Teams Added by Year
Record Count
0 600 1.2K 1.8K 2.4K 3K
Registration Start Date
CY2019 379
CY2018 2,456
CY2017 2,534
CY2016 2,812
CY2015 2,649
View Report (New Teams Added by Year)
Renewed Teams by Year
Record Count
0 500 1K 1.5K 2K 2.5K
Registration Start Date
CY2019 289
CY2018 2,345
CY2017 2,230
CY2016 2,376
CY2015 1,462
View Report (Renewed Teams by Year)
2018 Active Evalauators
540
View Report (Total Active Evaluators in 2018)
2017 Active Evaluators
532
View Report (Total Active Evaluators in 2017)
2016 Active Evaluators
502
View Report (Total Active Evaluators in 2016)

Dashboards

Active Teams By Species

Animal Species ↑	Record Count
Bird	8
Cat	188
Dog	9272
Equine	340
Guinea Pig	25
Llama / Alpaca	26
Pig	5
Rabbit	116
Rat	4
	9984

Reg "Complete," Reg End Date greater than TODAY
View Report (Active Registrations By Species)

Use Cases

ACCOUNT SETTINGS

Push

Signup | Verify Email | Login | Update Account | Confirm

Personal Information

First Name *
Colleen

Last Name *
Firefly

Email *
teamfirefly2+2@gmail.com

Phone (Optional)

Gender *

Military Service

Status *

Select one

- Select one
- Veteran
- Active Duty
- Guard
- Reserve
- Civilian

Sort by Category: Select one

Sort by Date: Select date range

Show Recurring: Yes No

SHOW ALL / CLEAR FILTERS

Mar 13 2019
Axe Throwing League
Oregon City, OR
Final League Playoffs are Wednesday March 13th @ 6:30 pmThe top 12 from each night will be competing in a double elimination tournament. We have...
Recurring | View Details >

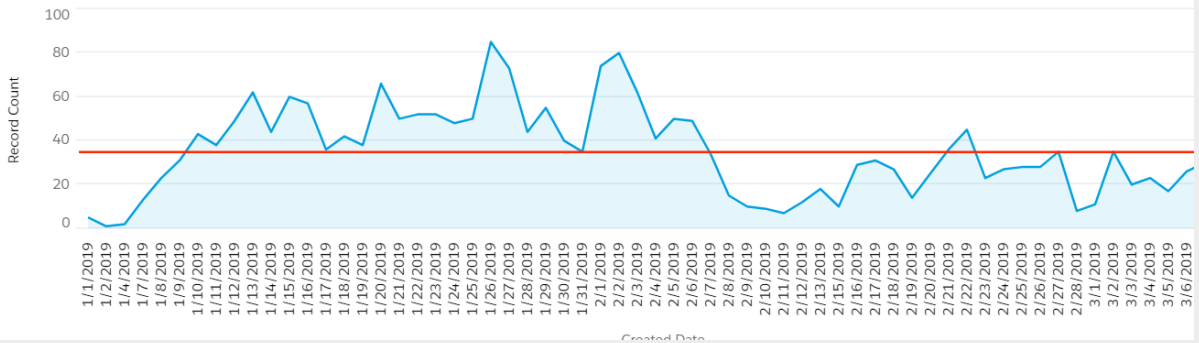
Mar 14 2019
Axe Throwing League - Open Throw!
Oregon City, OR
Cost is $10 to throw. Come on out and try it- it's a blast! This location is family friendly.
Recurring | View Details >

Mar
Post Shamrock Race Brunch
Portland, OR
March 17 come and join your Portland and Salem fellow Ea... amrock Race Brunch or just a cup of coffee.Where: Suki's Bar...
View Details >

Pull Events

REPORT: CONTACTS & ACCOUNTS
Media Source Report

Total Records
2,282



Backend Reporting

TEAM RWB

active minds | about us | our programs | about mental health | get involved | donate | shop | hello, colleen

Join Active Minds

Let's create a world where no one struggles alone

Pull information to display on website

Create an Account

Your current role with the chapter

President | Vice President | Funding Chair | Member | Advisor

What semester do you anticipate graduating?

Select one

What year do you anticipate graduating?

Select one

Are you affiliated with any of these other groups?

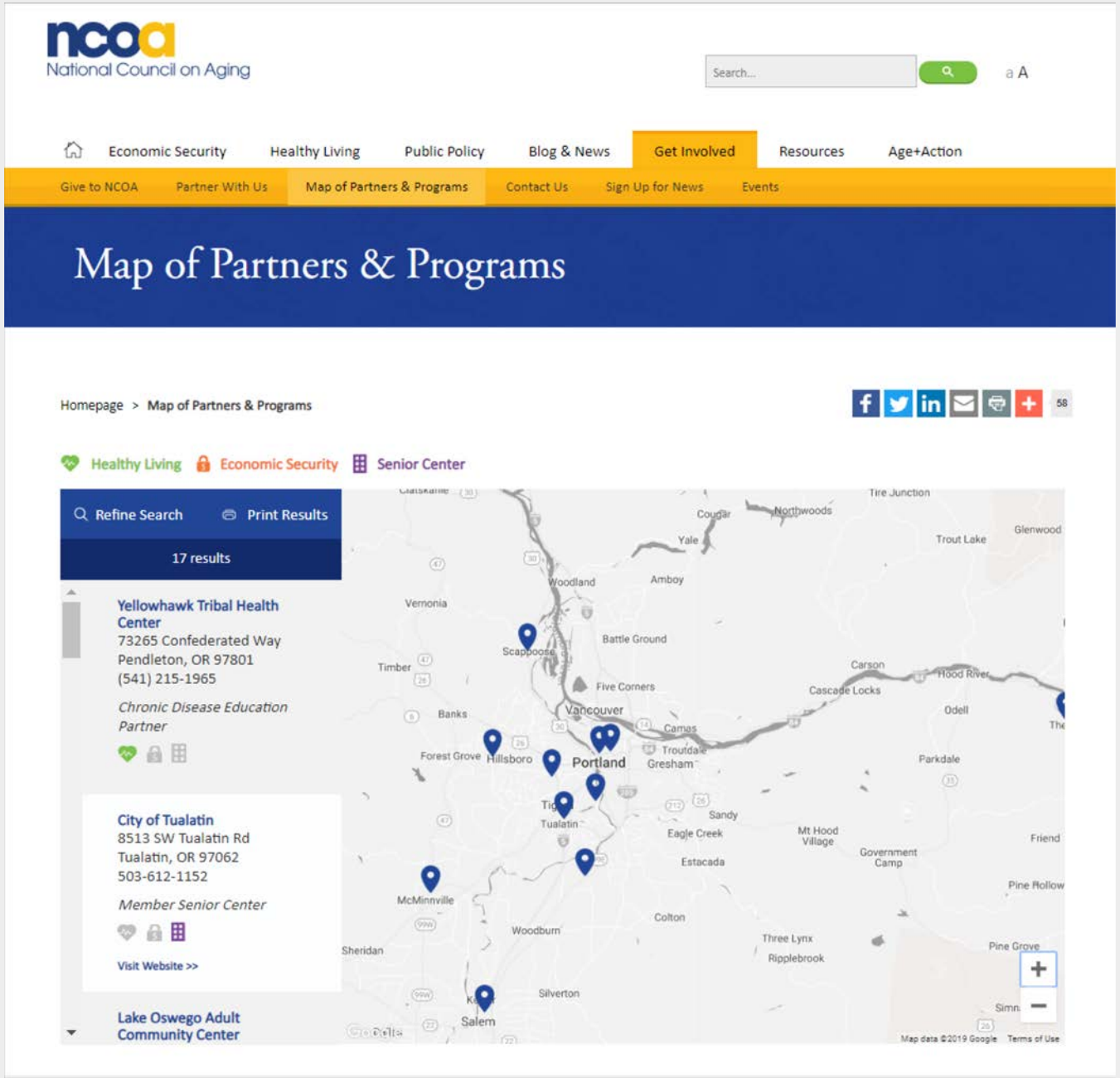
NSCS | Tau Delt | Student Government | Student Athlete | Veteran | Greek Life

upcoming tour stops

March 19	University of Mississippi	Oxford, MS
March 25	Arizona State University	Tempe, AZ
March 28	University of Texas at Arlington	Arlington, TX
April 2	Merced College	Merced, CA
April 3	California State University Stanislaus	Stanislaus, CA
April 4	Modesto Junior College	Modesto, CA

Push information to CRM

activeminds



Pull Data for search and filter, display on interactive map.

ncoa
National Council on Aging

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Questions?

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Remember to complete session survey feedback on app or website.

https://www.surveymonkey.com/r/19ntcsessions?c=130

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Thank You!

Link for collaboration notes:
http://po.st/front2back-19NTC

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www.petpartners.org | @petpartners