PowerBase Introducing Scenarios

Overview

The group will be presented with 3 organizing scenarios. They will be split into smaller groups and asked to develop and organizing strategy for their scenario.

Objectives

Our objective is to provide a base level lesson on organizing strategy. In addition, this lesson provides a context for all later exercises. Rather than learning how accomplish tasks in a vacuum, the scenarios provide a real organizing context to consider the pro's and con's of each PowerBase feature.

Requirements

Some experience organizing a strategy. It does not have to be an "organizing" strategy in a strict sense – it can be any strategy, such as a communications plan, plan for collecting back membership dues, or a plan to build out an individual donors program.

Materials

- Hand describing each scenario – all scenarios on one page, so everyone can see everyone else's scenario.
- Butcher paper or white board for instructors to write down key strategies. One section for strategies we will cover, and one section for strategies we won't cover.

Description

The lesson should take about 60 minutes, with 15 minutes of instruction and 25 minutes of small groups, and 20 minutes of report back.

Explain

Explain that we will break into small groups and each group will take on scenario.

Each group should come up with a 5 – 10 bullet point strategy for handling the scenario. Do not going into detail! Just the basic outline of your plan.

Suggest that people pick scenarios closest to their actual work – but that is not a requirement.

Small Group
Instructor should circulate and ensure there is an appropriate amount of detail.

Report Back
Report back one group at a time. For each strategy bullet point, assess whether it is something we will be covering in the training and put in the appropriate place.

We are looking for:

- Assess who are strongest leaders are in a given area
- Contact people matching a certain criteria/segment the database
- Import data from another source
- Collect data via online forms
- Email or do turn out

Overview

Measuring engagement challenges participants to think about organizing strategy and how to move people along an engagement ladder. It also provides training on useful tools for measuring this engagement in powerbase.

Objectives

All participants should finish this lesson with a solid grasp of how find the individuals in their database with the most activities, specifically how to use the Engagement Search and Event Count search.

Requirements

Familiarity with how PowerBase records activities – events, donations, etc.

Materials

- Exercises: Worksheet asking for counts based on Engagement and Event Count searches.

Description

The lesson should take about 45 minutes. All students should be using the training database for this lesson.

Discuss

Putting aside the scenarios… what are the objective indicators that a person in your organization is active? Attend meetings? Fill out petitions? Give donations? On board? Encourage people that may not be doing data entry that they can be using information such as messages. Email messages. Or people can consider what they would like to start doing even if they are not collecting data now. Start where they are.

Can you find these people in your database? Are you ever surprised by the results?

Demonstrate

Review how all events and contributions show up under activities.

Show Mary Tarver record:
https://training.ourpowerbase.net/civicrm/contact/view?reset=1&cid=2569

Show membership tab and event tab and then show activity tab

Add a new activity and put in an engagement level.

Review: you cannot set an engagement level for events or contributions – only activities added via activities tab directly.

Event Count search: Demonstrate a search for everyone who has attended 5 events since January 1, 2011. Demonstrate making it a smart group.

Limitations: only events. What if you track other forms of engagement? What if you use the engagement index?

Engagement Search: Demonstrate search for everyone with at least 3 activities of the type meeting or contribution since January 1, 2012.

Exercise

20 minutes: Hand out exercise and ask everyone to fill it out. When everyone is done, ask for the results and see if they are the same.

Conclusion: How are we going to use this on a day-to-day basis?

PowerBase Segmenting your Database

Overview

Segmenting your database is about more than advanced searching techniques – it involves thinking through who you constituents are and developing strategies for how to reach them effectively.

Objectives

All participants should finish this lesson with an idea of how they think of their organization's constituents as well as practical tips on how to unusual searches.

Requirements

Strong familiarity with advanced search.

Materials

- Making smart groups with good and bad mailing addresses (https://network.progressivetech.org/node/1094)
- Case Study: Purging useless records (https://network.progressivetech.org/node/1103)
- Tips for creating donor groups (https://network.progressivetech.org/system/files/Fundraisers%20Cheat%20Sheet%20for%20Creating%20Donor%20Smart%20Groups_0.pdf)
- Tips on Advanced search (https://network.progressivetech.org/system/files/Tips%20on%20Advanced%20Search.pdf)

Description

The lesson should take about 45 minutes. All students should be using the training database for this lesson.

Discuss

Pick the most developed of the scenario groups and ask them what their main communications will be. Try to elicit:

- Fundraising email
- Fundraising phone calls
- Email to fill out petition online
- Call to leadership meeting/strategy session

Next, try to name the groups that this communication will go to. Try to elicit:

- Universe
  - Universe with mailing address
  - Universe without vendors
- Active participants
  - Active participants for target zip code
- Leaders
- Donors

Demonstrate

Search Builder
Find everyone with a non-empty city, state and zip code.

Teach: Contacts vs Individual, Location Type (choose primary), what different criteria mean, And/Or search

Put in a smart group called: Everyone with a mailing address

Teach: Naming convention (develop one) and mailing list checkbox (don't check it unless you really want to send them email).

Include/Exclude
First find everyone with mailing address. Then add exclude group and see total go down by 2 (our two vendors)

Lookup Vendor smart group: how do you learn what criteria was used to create it?

Unsubscribe and mailing group strategy
Unsubscribe vs Opt out: one removes you from the smart group (choice of smart groups to be removed from) and one opts you out of all mailings. If you

send an email to dozens of groups, they will all be listed when someone clicks the unsubscribe link (don't create group called "morons who have been ignoring us"). Also, try to send to only one group, not many groups. Create a group of groups if necessary.

Removing people from a smart group doesn't remove them from the smart group. Say what? CiviCRM funkiness. The remove option is only used with mailings. If someone is removed from a smart group they won't get a mailing sent to the smart group, but they will turn up in search for people in that group.

Tips

- Create generic and re-usable groups for common mailings. If you send a newsletter, create a newsletter group and always send to this group.
- Educate everyone in your organization on the meaning of each group and when to use them
- Don't make a group a mailing group unless you intend to send it email. You can always edit the group later to make it a mailing group
- Don't nest smart groups unless you have to

Exercise

Review all materials. Does any of it apply to your scenario or your organization?

Importing Data into PB

Overview

Collecting information in spreadsheets and then moving them into PowerBase can be efficient, and we will learn how to do that for Contacts and Event Participants.

Objectives

Understand how information needs to be structured in order to be able to import successfully.

Requirements

Comfort with spreadsheet software, good understanding of how PowerBase creates contact records and event participant records.

Materials

- CiviCRM manual importing
- Spreadsheet functions tips sheet
- Sample CSV file to import (download)

Description

45 minutes total

20 minutes - Importing Contacts

10 minutes - questions

Everyone has a spreadsheet to import. Let's open it up.

Dedupe
Poll for familiarity. Cover de-dupe rules as strategy.

Filter the spreadsheet

First thing i do is filter, so i can see what kinds of answers we are dealing with. Items going into PB drop down fields have to be in PB so that the import works. If it is not there, that row does not get imported.

This is not an excel tutorial session, but it is useful to know how to do some things in excel. Google is your friend, but we have put together an excel resource sheet to help the people who are importing.

We need to be able to add custom fields and options for the multiple choice fields.

Let's look at the field **Local School District**. In the spreadsheet it has what values? Does it exist in PowerBase? The row will not be imported if the value for an options field is not already in PowerBase.

Now let's go to the import screen for Contacts.

Choose Data Source (step 1 or 4)
Import Data File - Choose file. If we have headers, check the box.

Contact Type - What type of contact are we importing?

For Duplicate Contacts - Almost always we start with **Skip**. If PowerBase identifies duplicates, we will get a spreadsheet of them and we can decide what we want to do with that list.

Dedupe rule - Leave it alone and you will use the Default rule. We have another lesson on this topic specifically. Our suggestion is to have a good default rule in place.

Import Field Separator - Almost always a comma. In europe CSV files are separated by a semi-colon (even though it is a COMMA separated file), but in the US it is a comma.

Date format - if you have columns with dates, they all need to use the same format. If you are not importing dates, you do not have to worry about this. If you get it wrong, PowerBase will let you know.

Lookup mapping info - If you are importing more than 100 records, please do not check this box.

Load Saved Field Mapping - Let's get to the second screen in order to explain what a Field Mapping is. The first time you do this, there will not be a field mapping for your data.

Match Fields (step 2 of 4)
For each field in your spreadsheet (on the left hand side) you need to identify the field in PowerBase that will hold the data.

Once you map every field, you can choose to Save the mapping. You mostly want to do this because if you made a mistake, or forgot to add an option (or many other things that can happen), and you find yourself importing this sheet again (or another one with the same fields) you will want to be able to not have to do this tedious work again. If you save it here, it will be available in Step 1, at the bottom.

Look at the phone options. You can even import Relationships. Check out Employer...

Preview (step 3 of 4)
Are we ready to import? Verify the total number. Does it match how many records you have in your spreadsheet?

Are there any errors in our data? Did we forget an option? Are we trying to import an invalid email address?

If there are errors, PowerBase will have a spreadsheet listing the error with each row. You can download that spreadsheet, open it and fix the errors on the main spreadsheet and start back at Step 1. Or you can finish the import and deal with the spreadsheet of mistakes afterwards.

ALWAYS create a new group for this import. If for some reason you totally screwed it up, you will have an easy way to undo: delete all the contacts in the new group you created!

You can also add these to an existing group, or more than one group, along with the new one that you are always creating.

Summary (step 4 of 4)
The final screen reports the successful imports along with Duplicate Contacts and Errors. If you have set the import to add all contacts to a Group or Tag, you can click through to see your imported contact records.

Duplicates will not be imported but you will have a spreadsheet available to download so you can continue working with those records.

Options for duplicates
Open the duplicates' spreadsheet, delete the first two columns, save and then import them with the Step 1 option set to **Update** or **Fill**. **Update** replaces data in PB with data in the spreadsheet. If the first name is different in the

spreadsheet than it is in PB, if you choose **Update** it will change the first name. If you choose **Fill**, it will only import information into fields that are blank.

There is another kind of error, where PowerBase sees missing Related data. If you are importing Employer names, for example, any record that does not have an Employer will show up in this error spreadsheet.

Importing participants, activities

Don’t do it. Instead, import contacts then assign.

Online Organizing

Overview

Interacting with people through the Internet is also something that Powerbase can support. We will look at the different ways that happens.

Objectives

Familiarize ourselves with the various ways to collect data online: Web forms, contribution pages; Event pages, membership pages; petitions, Social Media integration into PowerBase. We will also talk about what people need in this regard. Bring people back to your forms. Using profiles.

Requirements

Familiarity with social media, online forms

Materials

Computers; slides/screen

Description

30 minutes total

10 minutes: Start with a conversation – What is online organizing? What data is useful to capture when doing any of these things?

10 minutes: What does PowerBase currently offer? Demonstrate examples of existing integrations: CVH, VOCAL, Texas Environment. Stress the concept of mobile-friendly themes and forms in the examples

"Help spread the word" feature – Let's create a Contribution page (or Event or Petition)

- Facebook and Twitter:
    - Using posts or tweets to draw people to your campaign pages
    - Using strategically-timed posts to engage people to help meet your goals

Online Organizing

- Email drip concepts –
  - Web sign-ups: when a person gives you their email address via your website, have them automatically get a welcome email, that gets sent x days after they signed up.
  - Email campaign: manually segment out the recipients that took action as a result of the initial email and then send a follow up at a specified time. We can then also segment out those who have not responded and send them a different email.
  - Mass emailing click thrus – When you send a mass email, if your email has links and someone clicks on a link, that information gets saved in PowerBase. You could then tailor outreach to people who have shown interest in a particular area.

10 minutes: What would be useful?

Overview

How to use PowerBase to mobilize people to take action in campaign.

Objectives

Be able to use PowerBase to mobilize constituents to take action.

Requirements

Basic familiarity with searching.

Materials

- Step by step event turn out process (not created yet)

Description

60 minutes

Demonstrate
Explain: We are now going to use PowerBase to . This process facilitates phone calls for meeting attendance – allowing to make and track multiple calls for turn out.

Write out the following steps on big paper and explain each of them.

Create a group. These are the people you are going to try to turn out (this step is done: we'll use your “Responsible staff”)

Add your people to the event. PowerBase allows you to create a relationship between a person and an event. We start out with setting their relationship to “interested.” If they attend, we change it to “attended.”

Find your people (again), run batch update. There are certain things you do when your showing contacts (such as add to an event). There are different things you can do if you list them as event participants. We need to list them as event participants in order to update their participation status.

Now – demonstrate each step via the projector.

Exercise

Should run through this process with their own group and the REAL event (so we can see reporting, etc), record phone calls. Remind people: next, we will be doing reporting to see how your calls went!