PowerBase Day 1 Opening

Description

Close your eyes and imagine the world 50 years from now.

Lots of things are different, but pay close attention to the technology.

Go around and say your name, organization, preferred gender pronoun and then describe one technology that you see 50 years from now.

Overview

Entering Canvassing Results covers the basics of logging in and doing simple data entry of contacts from a convassing results page.

Objectives

The objective of this lesson is to ensure all participants are up-to-speed on the most basic PowerBase task, answer common questions about data entry, and put them in an organizing frame of mind. This lesson gets straight to the chase, allowing the participants to start “doing something” on the database as quickly as possible, with minimal presenting.

Requirements

Comfort using a keyboard, mouse and web browser.

Materials

- Exercises: a sample walk sheet
- Instructions for Groups: login and change passwords
- Instructions for Groups: create individual contact

Description

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

Demonstrate

Login and Password
Show students training database address, provide them with their user name/password, demonstrate how to login and how to change their password.

Staff Responsable
Explain that we are all working together, but the Database doesn’t know that yet, so we have to add ourselves to the Staff Group.

Have every one follow along:

Click on your link in the left sidebar under "Recent Items"

Click Groups Tab

Click Add to Group → Staff

Change Name
Update your first and last name

Add Campaign
Create a campaign called "Membership Meeting 2019". Don't follow along – just one campaign please!

Adding an individual
Demonstrate how to add a new individual contact. Explain:

- We are entering Individuals now, we will enter organizations later. This distinction is important since it allows us to create relationships between individuals and their employers (for example). More on this topic later.
- You can simply click "Contacts → New Individual" (we won't be using sub-contact types in this training)
- How to know if a field is required
- How to expand or contract field groups
- Demonstrate Entering: First name, last name, email, phone, home address, constituent type, and Staff Responsible.

Checklist
1. Added campaign?
2. Change passwords
3. Add yourself to staff responsible
4. Change name
5. Enter staff responsible when adding a new contact

Exercise
20 minutes: Hand out canvassing sheet that contains 40 made up contacts with email, phone numbers, addresses. Tell the group they have to self-

organize between them to ensure that all contacts are added to the database and everyone enters at least three contacts. Throughout the training, these will be the contacts they are responsible for.

Campaign Components

Overview

Understand how organizing steps correlate with how data is recorded in the database.

Objectives

The objective of building the components of a campaign is to ensure that everything learned in this track is contextualized in a real-world activity rather than just memorized as rote tasks. We also want to enforce the idea that we want to both record who a person is as well as each interaction we have with them.

Requirements

Participants must have basic familiarity with grassroots political campaigns.

Materials

Setup three pieces of butcher paper in the room. One says "What someone is" another says "What someone does" and the third says "Not recorded."

Ensure we have post-it notes.

Description

The lesson should take about 60 minutes.

Excercise

Start by explaining that everything learned in this track will be learned in the context of political organizing. We've already taken the first step: canvassing a neighborhood to find interested contacts.

Question for group: When we entered these contacts, did we record "What someone is" or "What someone does"? (refer to butcher paper). Answer: what someone is (because we have not yet entered the door knocking activity).

What other activities do we do when we organize?

Don't restrict to just tech related activities!

Campaign Components

Ask everyone to write each separate activity on a post-it note and when finished, put the post it note on one of the three pieces of butcher paper.

When finished, pick a few and ask the people who posted them to explain.

Demonstrate

Explain: We are going to review all the ways you can record interactions with contacts, with special focus on groups, relationships and activities.

Ask everyone to follow along on the screen, not on their own computer.

Do not review main menu items!

Pull up a single contact by entering last name, first name in quick search.

Review each tab. Explain: some tabs describe what someone is, most tabs show what they have done. Go into detail with:

- Relationships: explain concept, demonstrate adding one
- Activity: demonstrate adding a door knocking activity
- Explain concept of static group. Demonstrate adding a new group (via Contacts → Add Group). But don't search for contacts to add, just add the group, then return to your contact and add the contact to the group via the Groups tab.

Checklist

- Demonstrate relationships
- Demonstrate door knocking activity
- Demonstrate (static) groups

Excercise

Ask everyone to find their contacts (one by one via the quick search) and add a new activity for door knocking.

Researching Your Base

Overview

Researching your base will cover the basics of finding contacts in your database and understanding how to use actions.

Objectives

Provide users with the ability to find contacts they have recently entered, and to get an overview of the many other ways to search.

Requirements

Experience entering contacts so they can search for specific people to retrieve.

Materials

- Exercise: Search clues
- Instructions for Groups: basic searching

Description

This lesson takes approximately 60 minutes.

Demonstrate
Overview of searching. Explain:

There are many different and overlapping ways to search in CiviCRM, each with a different level of precision and complexity.

We will cover the following:

- Quick Search: Demonstrate with:
    - Name/Email: McClelland (explain what happens if you have no matches)
    - Name/Email: fred (explain partial first or last name matches)
    - Email: example.net (explain that everyone has this domain)
    - Actions: Explain that no matter how you search, you always get a set of actions to carry out on the result set.
        - Demonstrate how to select all records, or just a few
        - Demonstrate Print PDFs for contact

- Find Contacts: simple way to find contacts by group
  - Contact type (to restrict to individuals or organizations)
  - Demonstrate searching on a (static) group – Search for everyone in the Board of Directors group and show the individual contact you added in the previous lesson.
  - Briefly cover tag: similar to adding someone to a group – we generally recommend against using tags
- Advanced Search
  - The main interface for searching
  - Explain how to expand/collapse sections
  - Explain that you can use the percent signs.
  - Search on name: fred – demonstrate 4 records returned, then explain how to return to the criteria, and change display results as contributions. Now there are 15 records.
  - Show visual feedback on search terms
  - Demonstrate how to modify search terms: First search for everyone who has contributed more than $100. Woops too many. Then add “Last90 days” and it is less.
  - Explain importance of Reset button

Exercise
Find number of contacts returned by each of the exercise searches

Review answers from exercise, questions and answers

Organizing your base into groups

Overview

This lesson will teach participants the various ways you use searches to further categorize your base through the use of static and smart groups.

Objectives

- Understand the difference between static and smart groups
- Understand how to remove people from groups and impact on smart group

Requirements

Participants must have a basic familiarity with searching.

Materials

None

Description

This lesson should take approximately 30 minutes.

Demonstrate

Do an advanced search by the “Person Responsible” field. Ask everyone to follow along, but choose themselves as the Person responsible.

Under Actions, select New Smart Group and create a smart group for your people. Use the prefix: FUN and explain the naming convention.

Next, do a search for your smart group.

Explain: because it is a smart group, every time a new contact is added with you as the responsible person, it will show up automatically in your group.

Summarize: smart groups are like saved searches. Group naming conventions are critically important!

Exercise

Use the smart group you created to find your contacts. We have to make a follow up call to the people you canvassed to invite them to the membership meeting. We have to record the phone conversation as an activity, with notes on how the call went. Find everyone in your smart group. Then, one-by-one, add a new phone call activity. You can make up notes, whether you contacted them, etc.

Extra credit: If you did searches in the last lesson on your organizational database that returned useful information, create smart groups based on it.

Events

Overview

Introduction to creating Events.

Objectives

Understand when to track a meeting using activities and when to use CiviEvent, understand the meaning of all most CiviEvent options.

Requirements

Basic familiarity with searching.

Materials

- Creating a CiviCRM Event from the CiviCRM Book

Description

30 minutes

Explain

Activity Vs Event (5 minutes)

If you only want to track that someone was at an event, using an activity is the way to go – far simpler.

You only need to use Events if you require:

- Handle online and offline registration
- Track who actually came to the event
- Limit to a given capacity and have a wait list
- Have a public web page with the event details with social media links and a map
- Setup and collect fees
- Send Reminder Email
- Allow people to tell a friend

Events

Demonstrations: Don't follow along on your computers: Watch, then everyone will have a chance to create their own.

Demonstrate creating Event

Create an Event for a regular membership meeting.

Page 1 (Info and Settings)

Importance of filling out End date (will mess up searching)

Public Event: controls whether it is available via the web. It's useful if you are sending outreach emails or twitter posts, etc that advertise the event – you can just add a link to the event and not have to repeat all the data. Make it a public event.

Page 2 (Event Location)

Choose from existing locations. This info will be displayed on public page and used to create map. For address, enter an address near where people are canvassing:

2400 Wallingford Rd, Winston Salem, NC 27101

Page 3 (Fees)

Payment processor: Should be setup by your Admin. We don't need a payment processor because the meeting is free.

Page 4 (Online registration)

Demonstrate choosing from existing profiles (explain that profile manipulation is covered in advanced).

Page 5 (Schedule Reminders)

Skip – advanced topic

Page 6 (Tell a friend)

Skip – advanced topic

Page 7 (Personal campaign pages)

Skip – advanced topic

Exercise

Create your own event! Please don't name it "Membership Meeting"!

Contribution Pages

Overview

Introduction to creating contribution pages.

Objectives

Demonstrate basics of how to enable users to make donations to your campaigns.

Requirements

Basic knowledge of how to navigate in Powerbase.

Materials

- Online Contributions - step-by-step

Description

30 minutes

Theme: But wait a minute…

A volunteer hears about the membership meeting. They can't come but want to write a check to support the meeting.

Wait a minute! How can we record this check??

Demonstrate offline contribution.

1. Lookup contact
2. Click Contributions tab
3. Click New Contribution
4. Explain financial types

But wait a minute! What if he is a normal human being and doesn't carry his checkbook around? How can we accept a credit card donation?

Contribution Pages

Explain Payment processors

1. Show payment processor work flow
2. Discuss authorize.net vs stripe. Don't use Pay pal, don't use iATS
3. Setup dummy payment processors: include both live and test
4. Demonstrate contribution with credit card

But wait a minute! What if we want people to do this over the Internet?

Show existing contribution page

1. Go to Manage Contribution page
2. Review settings of existing Contribution page, explain how to fill in the intro message and footer
3. Skip sections that are not set
4. Show link to view live and testing page

Exercise:

Everyone create a contribution page: competition to see who has the most compelling one.

Communicating with your Base

Overview

Introduction to send mass mailings and printing mailing labels.

Objectives

Ensure participants are familiar with the basic steps of sending an email using CiviMail and printing labels using the Print Label Action menu from the search results page.

Requirements

Participants must be familiar with running searches and creating groups.

Materials

Presentation: Chapter from CiviCRM Book on sending mail

Description

60 Minutes total

Demonstrate

Overview (5 Minutes)
Explain that we are now going to send post cards and email people reminders about the event.

Mailing Labels Demo (10 Minutes)
Printing mailing labels. Ask a volunteer to take us through the steps of finding everyone in our target zip code. Next, select Mailing Labels and then the size.

Using simple mail vs CiviMail
Demonstrate way to send single mail to one or more contacts (via activities or via search).

Explain: limited to just 50 contacts, no click throughs or tracking. Only useful for one offs

CiviCRM Mail Demo (25 Minutes)

Go to first page of CiviMail and show how you need a group to send the message to. Ask: What group should we use? Elicit answer: everyone! But – what about people without email addresses?

Go to: Contacts → Manage Groups and show them the existing group: Every person with Email. Demonstrate how that group was created (% is wild card).

Mailing Tab:

Naming conventions: name of mailing and subject line can be different! The name only shows up to PowerBase users. Pick a good name.

Template: Demonstrate our template. Explain that PowerBase users can request one with their logo from support. Warn: selecting template obliterates our existing content. Use with care!

Recipients: Include/Exclude: explain. After you have added our first mailing, you will also be able to include/exclude from previous mailings

Demonstrate how to add text and add a link.

Header and Footer tab:

Header and Footer: If you use our template, you don't need a footer. If you don't use our template, please use the PowerBase footer (can spam act, etc)

Tracking

Explain all options – and how Click throughs are more reliable than opens. Advise against Track Replies (replies may get missed). Mailing visibility: If you are sending the agenda to your Board meeting, might want to not make it public.

Return to Mailing tab

Value of testing: You must test in many email clients, on phone, etc.

Schedule

Immediately doesn't mean immediately.

Exercise

Everyone must create their own mass mailing to their contacts.

Reporting

Overview

Provide an overview of PowerBase reports and how you can use them to understand your base.

Objectives

Understand the different between a report and a report template; know when to use a report and when to do a search.

Requirements

Basic familiarity with CiviCRM.

Materials

- Instructions for groups: Contribution Report Templates Overivew
- Instructions for Groups: Creating Reports – Basics
- Instructions for Groups: PB tip – Add Dashlet to Homepage

Description

Time: 60 minutes

Explain: Your ED has asked you to report on who attended. They also want to know how many people said yes compared with those attended. They want the report on their desk.

Ask: should we do a search or run a report?

Demonstrate

What's the difference between a search and a report?

- Searching is generally intended to show results on a screen, reports are designed to be printed
- Searches return a list of results, reports can optionally be designed to provide totals and other statistics

- Searches always have a list of actions you can run on the results, Reports can only have the results added to a group.
- Both reports and searches can be saved. Saved Reports are called “Instances” of a report and you can save them as a menu item. Saved searches are called “Smart Groups” and will be available wherever groups are used.
- Reports can be added as “dashlets” to your dashboard.

Turn Out Report.
Go to Reports → Event Reports

Go to Event Participant List.

Explain: This is a generic report that doesn't show the turn out effort fields.

Display fields: Invitation Response, Second Call Response, and Reminder Response.

In addition, it doesn't limit the results – so all events are included. Limit to just our event.

Demonstrate printing the report.

Then: you know that your ED is going to ask for this next week before the board meeting, so save yourself the pain and create a menu item so the ED can access the report whenever they want.

And... For next time, you can create a dashlet that shows up on your dashboard. That way you can monitor the turn out as you are organizing the event.

One more example
Go to Reports → Campaign Reports → Database Health Report last 12 months

Show results. Ask the participants who is the one with the most modifications.

Exercise
Using your own database, explore the reports and find one that is particularly useful for your purposes. At the end of the session, we'll ask people to explain which reports they chose.