Organization Business Process Flows

Click a business process below to view suggested changes to functions that are critical to an organization's success.

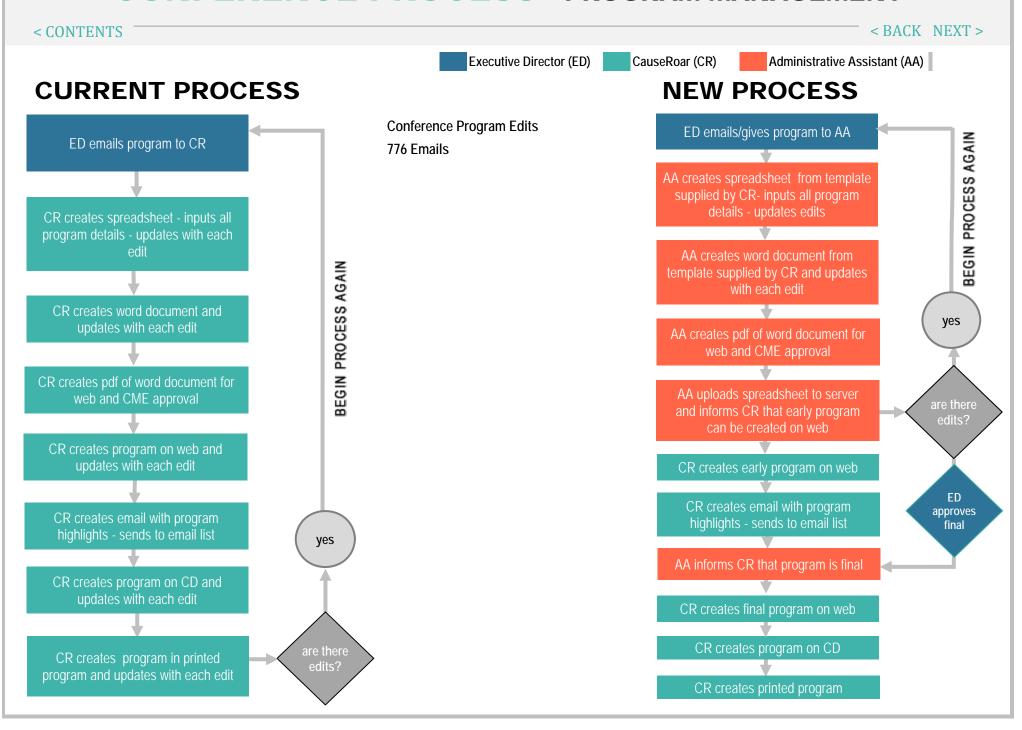


CONFERENCE PROCESS

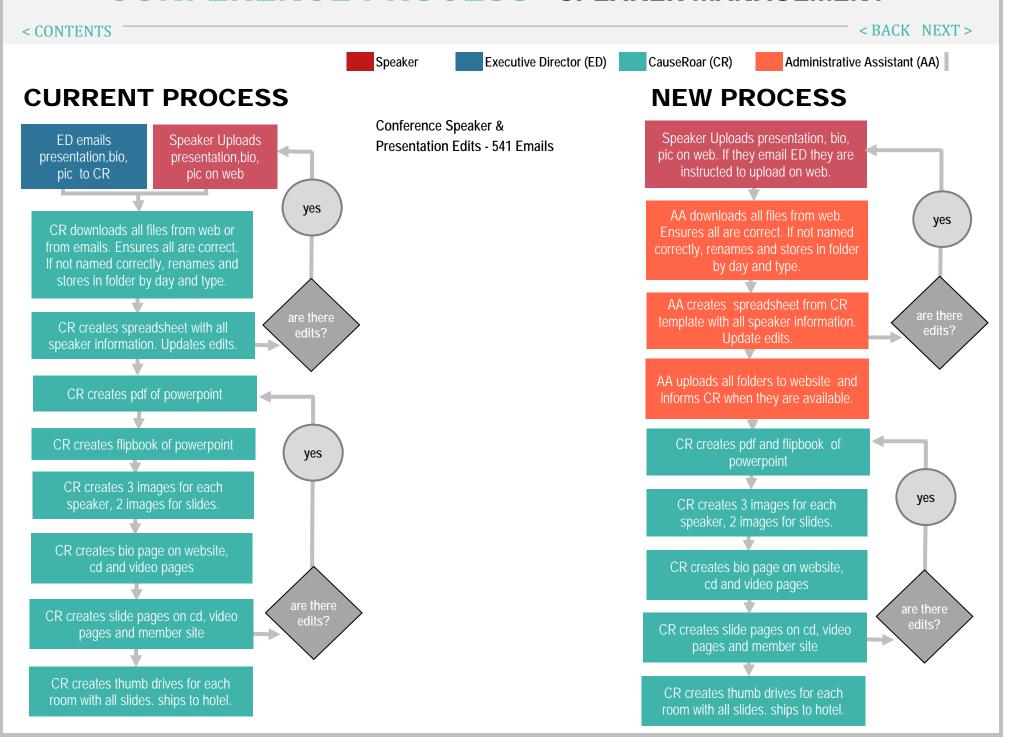
< CONTENTS < BACK NEXT >



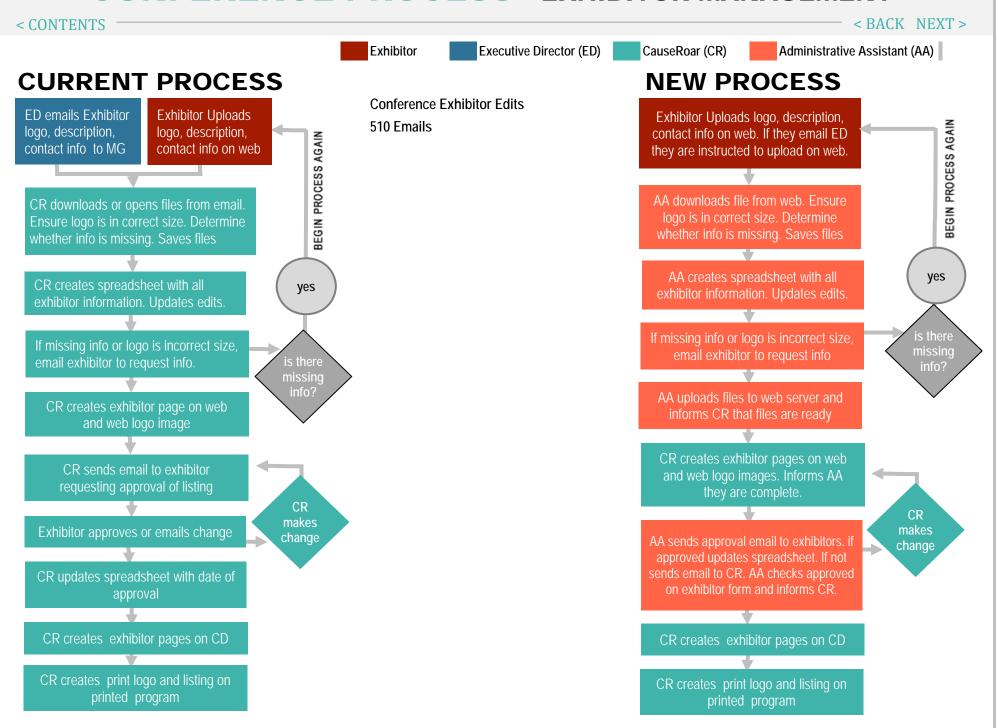
CONFERENCE PROCESS - PROGRAM MANAGEMENT



CONFERENCE PROCESS - SPEAKER MANAGEMENT



CONFERENCE PROCESS - EXHIBITOR MANAGEMENT



CONFERENCE PROCESS - PROMOTIONAL MATERIALS



CURRENT PROCESS

ED emails promotional requests to CR

Conference Promotional 202 Emails

yes

are there

edits?

CR creates spreadsheet of promotional items

CR gathers pricing for promotional items

CR contacts companies to send samples to ED. sends tracking info

ED makes decision regarding what items to purchase. Emails CR

CR creates artwork promotional item.

CR emails ED for approval of artwork

ED approves artwork or makes changes

CR uploads artwork and purchases product.

CR sends invoice and tracking info to ED

NEW PROCESS

ED emails promotional requests to AA

AA creates spreadsheet of promotional items

AA gathers pricing for promotional items

AA contacts companies to send samples to ED. sends tracking info

ED makes decision regarding what items to purchase. Emails AA

AA sends requirements to CR

CR creates artwork promotional item.

CR emails ED for approval of artwork

ED approves artwork or makes changes

CR sends artwork to AA

AA uploads artwork and purchases

AA sends invoice & ship info to ED

* Purchasing of CD and printed program will stay with CR

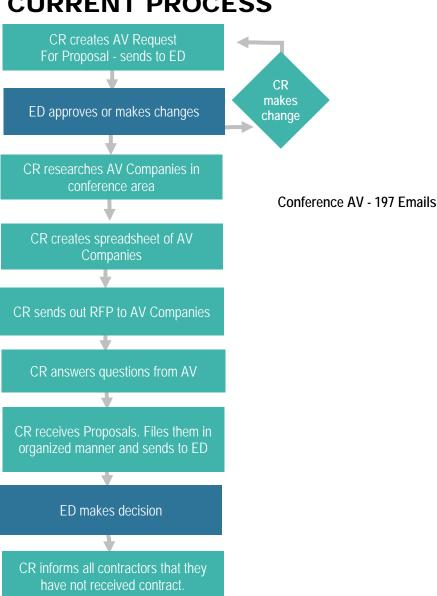
yes

are there

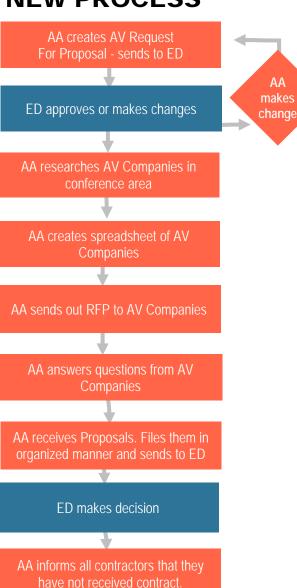
CONFERENCE PROCESS - AV REQUIREMENTS

< CONTENTS < BACK NEXT > Executive Director (ED) CauseRoar (CR) Administrative Assistant (AA)

CURRENT PROCESS

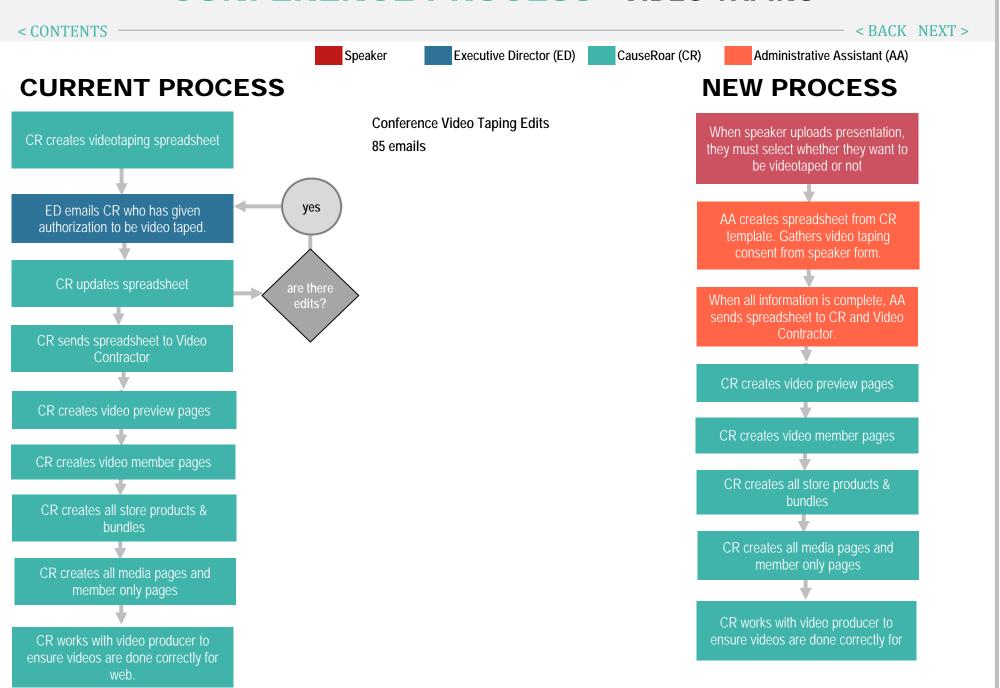


NEW PROCESS



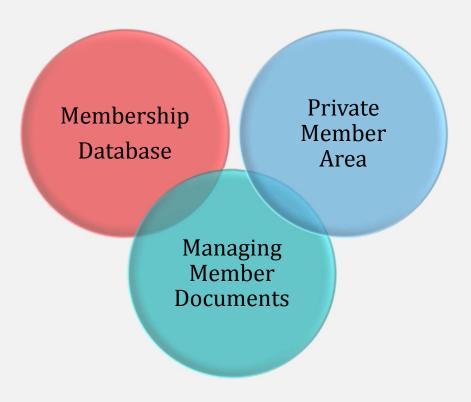
AA

CONFERENCE PROCESS - VIDEO TAPING



MEMBERSHIP

< CONTENTS — < BACK NEXT >



MEMBERSHIP - MEMBER DATABASE

Member

Membership Administrator

CauseRoar (CR)

Administrative Assistant (AA)

CURRENT PROCESS

Member applies for membership and data goes into database

1

MA receives email automatically when user applies

MA goes into database and approves member.

CR receives email automatically that user is approved.

CR goes into database and retrieves user info

CR logs in to Member Private Area and creates account so that member can access private area.

Member receives email with user name and password.

CR answers questions about member database

CR responsible for troubleshooting member database and custom development

NEW PROCESS

Member applies for membership and data goes into database

MA receives email automatically when user applies

MA goes into database and approves member.

AA receives email automatically that user is approved.

AA goes into database and retrieves user info

AA logs in to Member Private Area and creates account so that member can access private area.

Member receives email with user name and password.

AA answers questions about member database

CR responsible for troubleshooting member database and custom development

MEMBERSHIP - PRIVATE MEMBER AREA

< CONTENTS

< BACK NEXT >

CauseRoar (CR)

Administrative Assistant (AA)

CURRENT PROCESS

CR acts as Member Area administrator, which entails:

Answering questions from members on how to do certain things on the site.

User has forgotten their password and ask for help getting it. Send directions on how to access password

When member uploads anything on site that needs approval before posting - CR views upload and approves or disapproves.

CR creates video tutorials

CR creates new functionality when requested

CR updates officers, directors and conference slides

CR troubleshoots all issues with software.

NEW PROCESS

AA acts as Member Area administrator, which entails:

Answering questions from members on how to do certain things on the site.

User has forgotten their password and ask for help getting it. Send directions on how to access password

When member uploads anything on site that needs approval before posting - AA views upload and approves or disapproves.

AA is person ED goes to for all issues except for new functionality

CR creates video tutorials

CR creates new functionality when requested

CR updates officers, directors and conference slides

CR troubleshoots all issues with software.

AA should play the role of Online Community
Manager and should take a much more active role in
Member Private Area to encourage members to participate. Answer questions, make friends, send messages, comment on member profiles, start groups.

MEMBERSHIP - MANAGE MEMBER DOCUMENTS

Executive Director (ED)

CauseRoar (CR)

Administrative Assistant (AA)

CURRENT PROCESS

ED emails documents she wants posted in the member site

CR posts documents on member site

ED emails CR with member requests to post documents on site

CR posts documents on site

CR is responsible for all posting on site.

NEW PROCESS

ED emails documents she wants posted in the member site

AA posts documents on member site

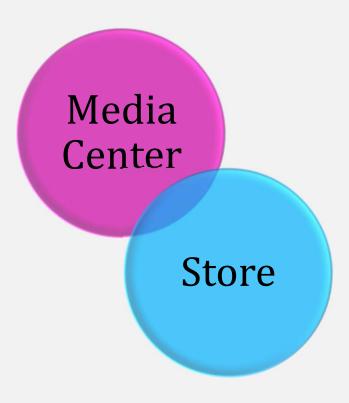
ED emails AA with member requests to post documents on site

AA posts documents on site

AA is responsible for all posting on site.

Media Center and Store

< CONTENTS — < BACK NEXT >



CauseRoar (CR)

Administrative Assistant (AA)

CURRENT PROCESS

CR manages all Media Processes and user interaction which entails:

CR answers users questions regading the links they purchased.
This can entail:

Resend user video links

Review payment questions in paypal

Comments and questions about videos

CR develops all video pages, video products, user data, password protrect areas, member videos, payment setup, new function development.

CR handles all software troubleshooting

CR manages all LiveStreaming

NEW PROCESS

AA manages all Media user interaction which entails:

AA answers users questions regading the links they purchased. This can entail:

Resend user video links

Review payment questions in paypal

Comments and questions about videos

CR develops all video pages, video products, user data, password protrect areas, member videos, payment setup, new function development.

CR handles all software troubleshooting

CR manages all LiveStreaming

User

Executive Director (ED)



Administrative Assistant (AA)

CURRENT PROCESS

User orders product:

ED receives email that product has been ordered

ED confrims in paypal that payment has been made

ED packages product

ED creates shipping document

ED delivers package to shipper

ED answers emails and phone calls about products purchased

CR creates new products in store.
Creates images and description

CR creates all web pages and develops new functionality

NEW PROCESS

User orders product:

AA receives email that product has been ordered

AA confrims in paypal that payment has been made

AA packages product

AA creates shipping document

AA delivers package to shipper

AA answers emails and phone calls about products purchased

CR creates new products in store. Creates images and description

CR creates all web pages and develops new functionality

Executive Director (ED)

CauseRoar (CR)

Administrative Assistant (AA)

CURRENT PROCESS

ED receives news items from members

ED sends news item to CR

CR gathers image from article or on istock

CR creates web image

CR posts article in wordpress with image

CR informs ED that new item has been posted

CR handles all web page development and software troubleshooting

NEW PROCESS

ED receives news items from members

ED sends news item to AA

AA gathers image from article or on istock

AA creates web image

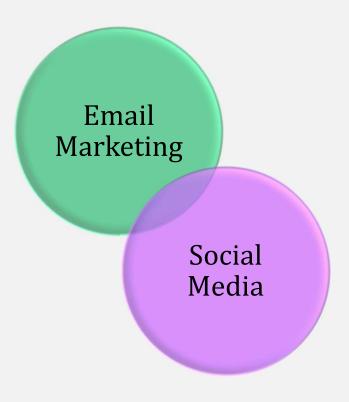
AA posts article in wordpress with image

AA informs ED that new item has been posted

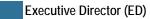
CR handles all web page development and software troubleshooting

MARKETING

< CONTENTS — < BACK NEXT >



MARKETING - EMAIL MARKETING







CURRENT PROCESS

ED emails CR with newsletter or request to send out email blast

CR gathers all images and content for email or downloads newsletter content

CR goes into contact form database and downloads new email addresses

CR uploads new email addresses into email campaign software

CR does html coding for emails and newsletter

yes

are there edits?

CR creates email campaign and uploads html.

CR sends test email to ED

CR sends out email to user email list

CR answers emails from users. removes email addresses and updates addresses when user has requested

NEW PROCESS

Process stays the same - Process below is added

AA is responsible for gathering Advocate email list and managing it and keeping it up to date

AA periodically sends email list to CR so that CR can update email database in campaign software.

CR uploads new email addresses into email campaign software

MARKETING - SOCIAL MEDIA

< CONTENTS

< BACK NEXT >

Executive Director (ED)



Administrative Assistant (AA)

CURRENT PROCESS

CR posts to Twitter when something is happening of note

CR created YouTube channel and posts new video previews.

Very little is being done in this arena.

This is a marketing function that should be addressed to increase conference & video sales.



NEW PROCESS

AA responsible for Tweeting on an ongoing basis

AA responsible for posting to Facebook

AA uploads video previews to YouTube

CR Creates Social Media Strategy Plan that indicates how organization will go forward in getting their message out across social media platofrms. May include:

Create Flickr account with all conference photos. Create Lyme disease Flickr group

Submit conference announcements, key articles to social news sites like stumble upon, digq

AA researches and manages activist blog list and comments, posts about organization conferences, news AA manages social media strategy and creates opportunities to promote organization such as:

Add conferences to facebook fan page;

Ask questions and participate in coversation, hosting contests,

Use tools to connect with top tweeters to spread the word,

Reply, retweet and join discussions on twitter to get more followers,

Promote event on twitter with hash tags,

Create fundraising campaigns.

Create contest where a person with can get a free ticket to the conference

* Read Social_Media_Guide.pdf to understand why this is so important to your organization.