RISE
Resources for Indispensable
Schools and Educators

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Introduction

Salesforce is the work tool that ties together all of our operations at RISE and makes those of us who remember life before Salesforce (think Excel sheets flying around the office and Post-it notes, lots of Post-it notes) very happy campers.

This RISE General Salesforce User Guide presents norms for Salesforce use by the RISE team which can all be summed up by the Golden Rule: _put into Salesforce what you hope some one would put into Salesforce for you (and in a way that you can find it)._ Consistently following these practices allows every one to know what the history of contact we've had with a constituent, how we've allotted our time, which goals we met, and many other essential tasks that continue to make RISE successful.

Please note that this is a general RISE Salesforce User Guide that also includes program specific guides for teacher functions, school functions, and fundraising. (Don't be overwhelmed! Not all sections are relevant to each team member.)

2. Keeping Our Data Clean

The Why
Clean data is everyone's dream. For those who don't like dust bunnies under the bed, it makes us feel better. For RISE, it helps us avoid sending two requests for support to the same donor, storing communication with a principal in two different records, or not being able to find a great vendor who printed our attractive brochures because they were not labeled appropriately.

Two rules of thumb:

1. One Look Now Saves Two Looks Later: Because Salesforce is being used by all members of the RISE Team – and has contacts from the last 5 years – always do a search first BEFORE entering any new information. The person, organization, etc. may already be in Salesforce.

2. Fill out what is needed: For reporting purposes, certain fields must be completed! The highlighted ones (notated with a red line next to the field) are the basis of organization-wide reports and, for data integrity, we need to make sure those fields are properly filled out.

3. Accounts and Contacts and Leads – oh my!

The Why

Quick quiz: Salesforce was originally created for what business type?

You are right – for sales! RISE's operations fit into this framework (though sometimes with a shoehorn). Below are some useful reminders and clarifications that help you to use these different data record types most effectively.

What are Accounts, Contacts, and Leads?

It's all about relationships. These are categorizations of the different types of relationships we have.

- <u>Lead</u> – A person with who there is the potential for a relationship (e.g. a teacher who might use RISE, a principal who might join RISE, a candidate for a job at RISE)
- <u>Contact</u> – People with whom RISE has an existing relationship. We know that relationship can be a broad concept, but it boils down to someone we want to keep in contact with. Contacts are always tied to an account.
- <u>Account</u> – The company or organization that houses specific Contacts (the people in them with whom we have a relationship)

For leads and contacts, each program (teacher outreach, schools, and fundraising) uses these distinctions differently, so it is important to refer to those **program specific points** later in this guide for more specific information.

Creating Accounts, Contacts, and Leads

There are different types of records for accounts, contacts, and leads that sort out by the appropriate buckets.

Account Record Types (and the fields that need to be entered for reporting purposes)

- General – Used for partners, foundations, and other general constituents.
    - Account Name (name of the organization or company)
    - Type – vendor, partner, press, etc.
    - Billing Address – need for correspondence and payment
    - Partner Type – specify if this is an organization that supports teacher or school outreach
- Donor / Household – Used for individuals and households that are potential donors.
    - Account Name – This is the name of the individual who is the donor/potential donor. Enter as Last Name, First Name.
- RISE School – Used for RISE Partner Schools (or potential partner schools).
    - Account Name – name of school

- Metro Location and Neighborhood
- School Type and Category
- Billing Address
- Description – provide general background on how RISE connected with school, any general information needed about managing relationship with this school (Principal-specific comments can be added to principal contact record.)
  - District—Used for school districts that RISE prospects or currently has relationship with.
    - Account Name—name of district
    - Type—Customer

Contact Record Types (and the fields that need to be entered for reporting purposes)
1. General Contact
   a. Name
   b. Account
   c. Relationship to RISE
   d. Newsletter
   e. As much contact information as possible
2. RISE Principal
   a. Name
   b. Account Name—name of school
   c. Description - provides general background on the existing relationship with RISE and information to help inform how we should interact with him/her.
   d. Newsletter – should be checked if this is a principal at a current RISE partner school
3. RISE Teacher – for teachers who use RISE
   a. Most of the fields (for AJS) are populated on this account through the completion of a teacher application.
4. RISE School Contact—for administrators at the school (not including principal; will also include past years' teacher leaders)

Lead Record Types (and the fields that need to be entered for reporting purposes)
There is currently only one lead type. For general leads, the important fields:
- Name
- Company (if not known, should be recorded as Unavailable)
- Lead Type

- Lead Status
- Newsletter

The Description Field – Friend or Foe?
The description field can be very helpful, but it can easily be overused. We don't want that. We want to use it to share information that everyone needs to see for context about the person or organization.

<u>Uses</u> – Here are relevant examples of information that should be included:
- Describe source of initial relationship with the person (if not otherwise readily identifiable through Relationship to RISE or other field) – e.g., friend of TK
- Provide other information that should be immediately available to RISE team member viewing record – e.g., deceased, note about how to interact with person, etc.

<u>How to enter information</u> – When you add an item to the description field, please begin with the data and your initials (10.2.09 CB - …)

<u>4. Recording Communication: Calls, Emails, and Notes</u>

The Why
Rationale – Logging the history of communication with a contact helps other team members (and you) know what we have done in the past. This has incredible power to:
  i. Provide background information on a person
  ii. Make decisions about what contact is appropriate (and not duplicating information already covered)
The goal of the call log is to give a quick, and easily browsable, summary of the substance of your communication.

Logging Calls

<u>When to use</u> – Use the Log A Call function in the Activity History list of a contact or lead record after every call with a constituent—incoming or outgoing, planned or unplanned, even when you leave a message.

The Subject line – This helps us see what the call was about at a glance. Be as descriptive as possible to highlight the main topic(s) of the call (e.g. found a job, outreach opportunities)

Messages – if you leave a message, begin the subject line with Call: LM - …(brief description of message)

Notes from the Call – Again, very important for someone to know about afterwards. These can be entered in two places:
1. *Shorter Notes:* Comments section of a Log a Call task, or
2. *Longer Notes:* create a Note in Notes & Attachments section or attach Word document in that section that contains the notes

If notes are not in call log, identify where to find those notes in the subject line (i.e. see attachment) or Comments section of the Log a Call task so we know where to find them.

Emails

Sending from Salesforce – Get into the habit of sending initial emails to a person through Salesforce. This prevents the need of the additional step of adding to Salesforce through Outlook.

Logging emails from Outlook – All substantive emails sent or received in Outlook should be added to Salesforce records (see more information in Salesforce Help & Setup).

Other Communication

For other communication (e.g. in-person conversations), notes should be added to the Salesforce record. Again,
1. *Shorter Notes:* Comments section of a Log a Call task, or
2. *Longer Notes:* create a Note in Notes & Attachments section or attach Word document in that section that contains the notes

Notes and Attachments Section

Every Account, Contact, and Lead record has a Notes and Attachments section. This is a useful place for storing notes from communication or other important information (resumes, related documents, a note about the current status of teacher, etc.).

Subject headings – Again, be as descriptive as possible so team members can see at a glance what the item is about. For Notes, make the heading as descriptive as possible and include the creator's initials and date of event. For Attachments, the subject heading is the title of the document.

5. Keeping Track of Contact Information

The Why
Keeping updated contact status is crucial for daily communication and mass outreach (newsletter, donor mailings). The protocols below help everyone know whether we still have good contact information for a person and whether we even want to.

Three Important Fields
Below are descriptions of the three relevant fields for keeping track of contact information. The scenarios later on show how these fields can be applied.

1. Communication Status field – The Communication Status field has eight options. The options fall into two groups.

For people RISE does not remain in touch with, select only one:
1. Inactive – person has left organization and we do not want to follow up
2. Deceased
3. No Contact: Opt out – individual asked for us not to contact them
4. No Contact: RISE decision - internal decision that this is someone we do not want to have further contact with

For people RISE remains in touch with, select all that apply:
5. Bad Email
6. Bad Phone
7. Email Opt Out – if chooses to opt out of receiving emails
8. Do Not Mail – if there is a bad snail mail, opt out, or other reason not to mail; there is an additional Do Not Mail Reason field that must be completed if this option is chosen. (This is used because development program may require more detailed qualification of information for mailings.)

NOTE: Inactive, Deceased, and No Contact status means either all contact info is bad or we will not use it anyway, so there is no need to supplement any of those categories with Bad Email, Bad Phone, Email Opt Out or Do Not Mail.

2. <u>Comm. Status Last Updated field</u> - This field tells the last date that some made an update to contact information (i.e. updating an email address, noting that the phone number is bad). This needs to be updated every time a change is made to Communication Status field or contact information (email, phone, address)

3. <u>Do Not Mail Reason field </u>– This field clarifies the reason for not sending snail mail and is important for donor mailings.

Using communication fields for mass communication

When you are pulling a report for people to call, email, or mail, please be sure to use the appropriate filters. For example, when we send the email, the distribution list does not include the Bad Email, Email Opt Out, Inactive, Deceased, or No Contact folks.

Scenarios (or wonderfully vivid examples of how to use the fields mentioned above)
1. Email returned as undeliverable
   a. Comm. Status = bad email
   b. Follow up as determined
2. Asked for us not to call
   a. Comm. Status = call opt out
3. Left company, but we have new contact information
   a. Account = change to new account
   b. Update phone, email, etc.
   c. Description – put note in the description that they left company
   d. Don't forget to update the date in the Comm Status Last Updated field
4. Left company, but RISE wants to stay in touch with this person
   a. Comm. Status = bad email, phone and/or do not mail (temporarily until corrected)
   b. Follow up as determined to secure correct info
   c. Description – update description field to note that person left previous organization
   d. Under Activity History related list, select Request Update to send email (if email is still correct)
5. Left company, but RISE does not want to stay in touch
   a. Comm. Status = Inactive
6. Died

   a.   Comm. Status = Deceased
   b.   Description – include note in description field
7. Fundraising: Hand deliver (instead of mailing)
   a.   Comm. Status = Do not mail
   b.   Do Not Mail Reason = Hand Deliver
8. Fundraising: Vendor
   a.   Comm. Status = Do not mail
   b.   Do Not Mail Reason = Vendor
9. Fundraising: Spouse
   a.   Comm. Status = Do not mail
   b.   Do Not Mail Reason = Spouse/Household member
10. Fundraising: Anonymous Donor
   a.   Comm. Status = Do not mail (or whatever is most appropriate)
   b.   Do Not Mail Reason = Anonymous Donor

6. Internal Organization – Schedules and Tasks

Calendaring and Scheduling

The Why
The Salesforce calendar is the RISE internal calendar. It allows us to find common meeting times and know when team members are available, in town, or sleeping.

Time zone differences - When a team member is temporarily in a time zone other than his/her usual, it can be difficult to read their calendar and schedule in a way that everyone understands.

Because Salesforce does not have an easy way to address someone being in a different time zone for a short period, submit duplicate meeting requests:
   1.   one for local colleague(s) in local time zone
   2.   one for event colleague(s) in other time zone (for their local time)

<u>Out of office events</u> – When a meeting takes place out of the office, give colleagues an accurate understanding of your availability. Two rules of thumb:

1. Include travel time in event scheduling (so colleagues know that time is also unavailable)
2. Set the Show Time As field in Salesforce as "Out of office" (red bar vs. blue bar)

<u>Meeting invitations</u> – When you receive a meeting request email, accept or decline invitation so colleagues can confirm that you will be present. If declining event, you can propose a new time.

Tasks

The Why
Salesforce tasks are a powerful tool for helping us achieve goals. We track our progress toward monthly, quarterly, and annual goals, as well as the way we are using our time. This allows us to manage workloads, reflect on time allocations, and plan effectively for future goals.

1. Enter name of coworker you are assigning task to, subject of the task and due date. Default status will be Not Started.
2. For reporting purposes, choose the corresponding Category and Balance Scorecard (auto-fill) category.
   - A more complete look at tasks and RISE is included at the end of this guide.

<u>7. Salesforce Integration with Microsoft Outlook, Microsoft Office, and Mobile Devices</u>

Microsoft Outlook
We synch outlook to Salesforce to attach emails to Salesforce contact or lead records. You can also import contacts you have in Outlook into Salesforce.

The RISE Salesforce Administrator will help you synch Outlook with Salesforce. For additional help understanding how to use the synched Outlook, see Salesforce Help & Training.
   - [Outlook Edition 2.0 Fundamentals](#) (70 minute training)
   - [Outlook Edition](#) (Help topic)

Microsoft Office
The value of integration (as told by Salesforce)

Excel - The Excel add-in securely delivers your Salesforce reports into Excel in real-time with a simple interface. You create the reports you need in Salesforce, then pull them into an Excel worksheet, and optionally use Excel's formulas, charts, and pivot tables to customize and analyze your data. As a last step, you can distribute your customized Excel worksheets via Content, allowing all users to track customized analytics in real-time.

Word - The Word add-in helps you create mail merge templates for use with Salesforce's online mail merge utility. The Word add-in allows you to quickly and easily insert Salesforce merge fields into a Word mail merge template.

How to integrate – See Salesforce Help topic (What is Office Edition?) and work with the RISE Salesforce administrator for help.

Mobile devices
For a step by step guide, see instructions in the Help & Training section.

8. Reporting in Salesforce

The Why
We love Salesforce because of its reporting capabilities. Unfortunately, sometimes we love it too much. We started creating reports for everything and everybody was making them. As you can imagine, the report folders got very messy very quickly. But time has taught us that there are some reports that are key and will be used over and over (sometimes with slight modifications)—these are the base reports. It is important to use the information below so we can keep folders organized with reports that are useable by everyone.

Report Types
There are two main types of reports.
1. Organizational – These are base reports already set up for specific purposes and used by multiple team members. They are found in the directories labeled "Base".
    **Any folder marked "Base Reports" should *not* contain a report that is revised for personal use (ie. Teacher Base Reports)
2. Personal – These are reports you need for a specific or unique purpose. These can be adaptations of base reports (e.g. for a specific geographic area) or a different report that is for your specific work. You make them from scratch or by modifying existing reports.

Modifying organizational/base reports
Existing reports can be modified for a one-time use or an on-going use.   If you want to save a modified report because you will reuse it, determine the appropriate place to store the report. You have three options:
1. <u>My Personal Custom Reports folder</u> – This is where you keep reports that are only (or primarily) used by you. This includes base reports you tailor for your needs.
2. <u>Unfiled Public Reports folder</u> – This is where you keep temporary reports that need to be used by you and other team members. Reports in this folder are used at your own risk (since they lack the official RISE stamp of approval).
3. <u>Other organizational folders</u> – Reports in this folder have been put there because they are useful organizationally. If you see a need for a report that is not there, talk with your supervisor and/or team members to be sure there is agreement. The System Administrator or other appropriate person will help create the report.

How to Create Reports
See the Salesforce Help & Training (Training - [Reporting Fundamentals](#); Help topic - [Creating a Custom Report](#)).

How do I label reports?
In the description field, provide notes about any problems or things to be aware of related to the data (e.g. the report only shows x schools because y data was missing, using teacher application date vs. date teacher is approved, etc.)

<u>9. Storing Documents in Salesforce</u>

The Why
Salesforce Content allows us to make documents available to all team members. To make sure everyone knows where to store documents and where to look to find them, we have a standard set of workspaces.

What documents should go on Salesforce?
- Documents that are relevant for other team members or should be generally accessible
- Documents to keep for knowledge management
- Meeting notes

Where do I put them?

Like my father always said: If you're not sure, ask. During a meeting Process Check, confirm if there is any question where the notes should go. See Content specific information later in this guide.

10. Campaigns

The Why
Campaigns allow you to group a subset of contacts and leads for a specific purpose (i.e. targeted emailing, annual donor ask, etc.)

How to Use a Campaign
See the Salesforce Help & Training section Managing Campaigns. The RISE Salesforce administrator can help you further.

Please note that these are important fields when setting up the campaign:
- Status – choose what is appropriate
- Start and End Date – this let's us know when a campaign is completed and can be made inactive
- Active = yes – you will not be able to use the campaign without this checked.

11. Email Templates
The Why
Email templates are templates you create for emails that you repeatedly send with the same language. You can use the template as a pre-made email and make small modifications when you need to.

Kinds of Templates
Like reports, there are two types of templates:
1. Organizational – These are commonly used templates already set up for specific purposes. They are found in the email template directories. The teacher outreach team has common templates used for a variety of purposes. For example:
    o Leads: Not Qualified – An HTML email to people who express interest through our website but are not qualified
    o AJS: Qualified? (low-income) – A text email confirming that a teacher who has applied has low-income teaching experience.
2. Personal – These are templates you need for a specific or unique purpose. These should be saved in your My Personal Email Templates folder. For example:
    o Bay Area AJS Deactivation message – A message used in June to determine if AJS are still looking for a job.

How to Make a Template

There are two types of templates: HTML and text. HTML emails allow to you track whether the recipient has opened the email. They also allow more formatting options (fonts, bullets, etc.) and allow you to embed hyperlinks.   Making the templates is explained in the Salesforce Help: Creating HTML Email Templates and Creating Text Email Templates. (Note: For HTML templates with stationary, use the RISE stationary.)

Using an email template
For individual (or one off) emails, when you use the Send an Email function in a Contact or Lead record the top menu bar gives you the option to Select a Template. For the mass emailing function (see below), you will be prompted to select an email template for the message.

12. Sending mass emails through Salesforce
The Why
If you are sending the same message to a large group of constituents (e.g. more than 10), sending a mass email may be a more efficient way. This allows you to send an email with customizable data from Salesforce fields – e.g. putting someone's first name in the salutation. Two examples of how we use this function are sending the RISE eNewsletter and sending mass emails to AJS to see if they are still looking for a job (**See more information about sending mass emails with a campaign later in the guide**).

Two Ways to Send
1. Contact/Leads Mass Email through Salesforce – This function is appropriate for mailings to groups of 250 or less. There is a limit to the number of mass emails that can be sent per day in Salesforce. This should not be used for large scale marketing campaigns (e.g. donor asks, newsletter sends). For the how-to see Salesforce Help & Training Sending Mass Email
2. Vertical Response (3rd Party Email-Execution Provider) – As of 10/2007, Vertical Response is the current provider of mass communication in Salesforce. Because we are a non-profit we are eligible for their free email credit program (we receive 10,000 free emails per month).

13. Making Changes to Salesforce
The Why

For data in Salesforce to be most effective, we want to have the fewest number of fields, clearly labeled and understandable, that provide the information RISE needs to function effectively.

The Change Process
Before suggesting changes (deletions, additions or modifications) to any part of Salesforce, think through these important questions:
1. Who will/should these changes affect (all programs, just teacher program, just LA program, etc.)?
2. How might these changes affect current uses or future needs?
3. Whose buy-in is needed to make these changes useful?
4. How will these changes be communicated to those who are affected?

Once you have identified the changes to be made with as much detail as possible (e.g. specific records or views that will be affect), present them to our Salesforce Administrator for approval and execution.

Appendix A: RISE Base Reports

These are a sampling of the standard reports available for organizational use.

- Teachers Base Reports
  - Apps
    - All Application Data – All data submitted in teacher application (from contact and lead record) with Haberman scores
    - All Applications by Source - sorted by source with accept/reject status
    - Haberman scores – all currently completed applications w/Haberman scores
  - AJS
    - Current AJS – sorted by RISE Rating; provides job seeking preferences
    - Deactivators – tracks teachers who have deactivated
    - Reactivators - # of teachers who have reactivated
  - Partial Applications (Partial App:)
    - Partial Apps: Haberman Incomplete – Teachers who have not completed Haberman
    - Partial Apps Current – Shows partial apps from current year. Limit by Last Application Date.
  - Marketing
    - Outreach Sources - Partner Type=Teacher Outreach
    - Teacher Campaigns by Dates - Teacher Outreach Campaign with date limits in criteria.
- Schools
  - Matching
    - Active Schools – Schools in that have contacted teachers. Limit by Created Date.
    - Active Teachers - All teachers who have sent emails to principals in each metro. Sorted by contact date
    - School Job Opportunities – Tracks School Job Opportunity History. Sort by Close Date. 2006 is misrepresented because the SFDC integration put together 2004,2005 and 2006 opportunities
  - Survey
    - Survey Averages – Averages for 5 domain scores (by Metro)
  - Membership
    - Flash Report – School reporting for Flash Report
- RISE Rewards – for knowledge management maintain existing reports
- Newsletter Distribution Lists

- o   Newsletter Subscriber List
- Volunteers
  - o   Regional volunteer reports
- Vendors – administrative function reports
- Unfiled Public Reports
  - o   Team PTO Report

Appendix B: Teacher Application Processing

INITIAL SCREENING	

1. Review for minimum qualifications
   a. At least 1 year of full time teaching in low-income setting
     i. Resume may be needed to confirm this
     ii. Use GreatSchools.net to find free and reduced price lunch info for schools
   b. Credential is or will be complete by September 1st of the program year..
   c. Haberman 3rd quartile or above (Note: This may change based on internal discussion.)
   d. References are valid (e.g. senior capacity)
2. Review for other flags
   a. More than 10 years of total experience
   b. Has not been out of teaching for more than 3 years
   c. Low income teaching experience more than 3 years old
   d. Teacher's essay
     i. Significant spelling and or grammar errors
     ii. Statement that seem inappropriate or objectionable (e.g. not all students can learn, significant negativity about last teaching experience)
   e. Inconsistency between resume and application (e.g. work experience, credentials held)
   f. (end of year) Are positions available for teacher?
	1. Finding Teacher Applications - views on the Teacher Applications tab in Salesforce sort out teachers that are currently in process:
	   a. Submitted – new applications
	   b. Internal Review – new applications that have an eligibility flag checked (convicted of a crime, dismissed from a school, under contract); other teachers that have been moved by staff into Internal Review
	   c. Other categories correspond to the status assigned in #3 on the left
	2. Finding the information on Teacher Applications - the teacher application is split into two parts in Salesforce
	   a. Contact record – information that should not change year to year
	     i. Contact Info (name, address, email, phone)
	     ii. Demographics (gender, ethnicity)
	     iii. Current Resume
	     iv. Credentials
	     v. Education (undergraduate and graduate)
	     vi. Haberman scores
	     vii. How the teacher heard about RISE
	   b. Teacher application record – information that will change each year
	     i. Years of teaching experience

3. Assign the appropriate status (each will be explained further below):
   a. <u>Internal Review</u>: teacher meets minimum qualifications but there is a flag about the teacher that needs to be reviewed by RISE staff
   b. <u>Interview Required:</u> teacher meets minimum qualifications, has at least one senior reference, and is ready to move forward
   c. <u>Waiting for Ref – New</u>: teacher meets minimum qualifications, completed application within 2 days of reviewing it, and we are just waiting for the reference to come in
   d. <u>Waiting for Ref – Bad Info</u>: teacher meets qualifications but senior ref bounced back with bad email
   e. <u>Waiting for Reference</u>: teacher meets minimum qualifications, completed application more than 2 days ago, and we are just waiting for the reference to come in
   f. <u>Reject</u>: does not meet minimum qualifications or has other significant issue (Notes should be made about other issues.)
   g. <u>First Reject</u>: Used when others are doing screening who need to have their recommendation to reject reviewed by another staff member or if decision to reject comes same day application is submitted. (Notes should be made in Application Notes section.)
   h. <u>Other</u> – teacher does not complete the RISE processing or there are no positions available and candidate is not high needs (for end of year only)

   ii. Job seeking preferences (geography, subject, grade)
   iii. Eligibility to be hired (e.g. under contract, convicted of a crime, dismissed from a school)
   iv. Reflection statement
   v. Senior references
   vi. Completed references (these are found in a related list on the Teacher Application record)
   c. *Generally information regarding an application should be kept on the application record, with the exception of correspondence with the teacher.*

VIDEO: Overview of teacher application parts in Salesforce (http://www.screencast.com/users/RISETechSupport/folders/Jing/media/85e57bf2-0ddf-447c-948f-5367bde94085**)**

3. Make any notes regarding the application in the Application Notes section
4. The Application Status is set and changed in the field on the Teacher Application. The status will roll up to the Application Status field on the Contact record so it is visible there are well.
5. An App Status Exit Date is automatically set for 28 days out from the date of submission of the application. This is a guideline for RISE staff and also triggers automatic emails and actions based on this date. The date can be manually overridden at any time.

POSSIBLE IMPROVEMENT
- Checkboxes for each minimum requirement to confirm it has been reviewed and verified. Validation rules can be created in Salesforce so application cannot move to certain statuses (Interview Required, Accepted) without all boxes being checked.

RESUME CLEANING

The resumes of applicants who are qualified to move on in the process need to have contact information removed (everything except the teacher's name). This prevents principals from finding teachers on

Cleaning the resume:
1. Open the resume and save a local copy on your desktop with the contact information removed. (For document name, use

RISE and then initiating contact with them outside of the RISE Network. The email sent through the Network is our record of the principal's interest in a candidate.	the teacher's FirstNameLastName – e.g. MichaelJames.doc) 2. Use the link on the Teacher Contact record to go into their portal record. 3. On the documents tab of the portal record, upload the cleaned resume. 4. Once uploaded, right click on the link to the document in the portal record and select Copy Link Location. 5. Replace the current resume URL on the teacher's contact record with the new URL by pasting the copied link in the Current Resume field. **See Video: How to Clean Resume in Salesforce** (http://www.screencast.com/users/RISETechSupport/folders/Jing/media/6e05474c-d7b8-46de-ab06-2e61af1a15aa)
REFERENCE MANAGEMENT	
At least one senior reference who has observed the applicant teach is required before a teacher can move on to the activation call. Preference is for teachers. (An administrator, department chair, lead teacher are best; mentors, university professors may be acceptable.)	Teachers are required to provide at least one senior reference in their application (with phone and email address). Upon submission of the application, reference requests are sent by email to each reference provided asking them to complete the brief reference form. Completed reference forms are found in a related list on the Teacher Application record.

1. **Waiting for Reference categories**: If an application meets all of the minimum criteria and the only step before the activation call scheduling is waiting for a reference, the candidate is moved into one of three categories:
   a. Waiting for Reference – New:
 	
      i. For teachers who meet minimum qualifications, completed application within 2 days of the review.
 	
   b. Waiting for Reference – Bad Info:
 	
      i. For teachers who meet minimum qualifications
	1. **Waiting for Reference categories: workflow**
	   a. Waiting for Reference – New
	
	      iii. Workflow Rule: *Waiting for References – New app*
	
	      iv. This will hold the teacher for 2 days in this category and then move them into Waiting for Reference status to receive the series of email requests that are triggered by that status. This gives references at least two days to respond to the request before we contact the candidate asking them to follow up.
	
	   b. Waiting for Reference – Bad Info
	      i. **POSSIBLE IMPROVEMENTS:**

and for whom one or more of their senior reference request emails bounced back.

    ii.   This status should be used in a conjunction with the Bounced Reference Request procedure below.

c. Waiting for References

    i.   For teachers who meet the minimum qualifications and completed application more than 2 days ago.

    ii.   Upon moving to this status, the staff member should also re-send the reference requests using the appropriate links on the teacher application. (See section below: Resending Reference Requests.)

    iii.   Moving a teacher to this status triggers a series of 4 follow up emails over two weeks requesting them first to follow up with the references and later to provide alternate references that might be contacted. After two weeks, it sends the candidate a rejection email and changes their status appropriately.

    iv.   In some cases, reference requests get caught in spam filters. For high needs candidates, requests may be sent through a RISE staff member's personal email with a Word document version of the request as an attachment. The reference may also be called directly.

    v.   **PROCESS QUESTION: How many follow ups to do with references? Should there be one for each**

        1.   Set workflow rule to send email reminder that have not received good reference __ days before App Exit Date.
        2.   Reject automatically on App Exit Date.

c. Waiting for Reference

    ii.   Workflow Rule: *Waiting for References: Automatic Email Response*

    iii.   Launches a series of four time based emails while candidate is in the Waiting for Reference status:

        1.   After 1 hour: email template: *Reference: Update - Waiting on Refs* (requests them to follow up with the reference to ensure completion)
        2.   After 4 days: email template: *Reference: 2nd request* (gives opportunity to submit another reference)
        3.   After 9 days: email template: *Reference: Final Request* (indicates three attempts to contact reference; gives final opportunity to submit another reference)
        4.   After 14 days: email template: *Reject: 2009 no references (*removes application from consideration because no response)

    iv.   **POSSIBLE IMPROVEMENT:** Another workflow rule that automatically rejects candidate (tied to Application object.

d. Waiting for Reference – Responded

    i.   **POSSIBLE IMPROVEMENTS:**

        1.   Set workflow rule to send email reminder that have not still have not received a response from the reference __ days before App Exit Date.
        2.   Reject automatically on App Exit Date with

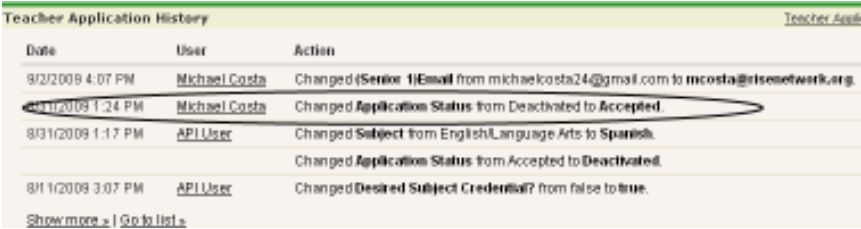|	

email that goes out. If so should reminder be provided to TAQ via workflow tasks?
 	
d. Waiting for References – Responded
 	
    i. For teachers who meet minimum qualifications and have responded to notification that we are waiting for reference responses (e.g. said they will contact their reference or are looking for another reference/other contact information). This pulls them out of the email stream tied to the Waiting for References category.
 	
    ii. When a teacher is moved into this category, an App Exit Date should be set (generally 10 days out.) This will be their deadline for follow up before the application is removed from consideration.
	appropriate email.

2. Bounced Reference Requests
  a. When a request sent to a reference bounces, the email comes to info@risenetwork.org.
  b. A TAQ staff member should go into the teacher's Application record and check Reference Email Bounced box for the appropriate reference (SR1 or SR2).
  c. Upon checking the box, an email will automatically be sent to the candidate notifying them that the reference bounced and asking them to provide an updated email address or another reference.
  d. If a teacher provides corrected information, TAQ staff should update it in the Application record, uncheck the Reference Bounced checkbox, and re-send the reference request using the link on the teacher application.
	2. Bounced Reference Requests
	  a. Workflow Rules: *Senior Ref 1 Bounced; Senior Ref 2 Bounced*
	  b. Sends an email to teacher with the reference's information requesting them to update or replace the reference. Email templates: Reference: *Senior Ref 1 Email Bounced; Reference: Senior Ref 2 Email Bounced*

3. Resending Reference Request	3. Resending Reference Requests

If a reference does not respond to the initial request, it will be necessary to reach out again. There are three ways to do this:
   a. Re-send the request through the application
   b. Send the request as a Word document attachment through personal email (may avoid problem of request getting caught in spam filters)
   c. Call the references.
	VIDEO: Re-send reference requests
	(http://www.screencast.com/users/RISETechSupport/folders/Jing/media/d6e586e5-418e-4e38-8dd2-94f0a20dc53a)

4. Reference Comes In
   a. Salesforce will send an email when a reference comes in for a teacher in any of the Waiting for Reference categories. Review the reference and update the status appropriately.
	4. Reference Comes In
	   a. Workflow Rule: *Reference came in*
	   b. When a reference form is completed for a teacher who is in any of the Waiting for Reference stages, an email is sent to TAQ staff. (**NOTE:** Need to define who receives the email among TAQ staff in the workflow.)

5. Manually Adding a Reference
If a RISE staff member completes a reference check by phone or other means, the reference can be added to the teacher's record in one of two ways:
   a. If it is an existing reference provided by the applicant, use the Resend Senior Reference 1/2 Email link to get the reference link to the appropriate reference form.
   b. Manually create a reference by using the New Teacher Reference button on the Teacher Application record. (see the video how-to)
	5. Manually Adding a Reference
	   a. **VIDEO: Adding a reference -**
	http://www.screencast.com/users/RISETechSupport/folders/Jing/media/d562d710-a4d3-4554-924f-16fa1248dc77

ACTIVATION CALLS	
1. Purpose - The activation call serves two purposes: a final screening tool and a way of engaging the teacher in RISE through a relationship to encourage activity on the Network.	

2. Assigning the caller
   a. The caller is assigned based on two criteria: Geographic Preference and Haberman Quartile
   b. In 2009, all 1st and 2nd quartile teachers were called by the Executive Director in their Desired Metro Location. All 3rd	

quartile teachers were called by RISE National TAQ staff. **PROCESS NOTE:** This division of labor will be revised for the 2010 program season.	

3. Scheduling
 	
    a. Schedules were maintained on Google Doc spreadsheets. RISE staff set their schedules for the following week (e.g. which days/times would be available) the Wednesday before.
 	
    b. When a teacher was moved to Interview Required status, an email was automatically sent asking them to schedule a time for the activation call. The email was based on their Haberman Quartile and Geography and gave them a link to the appropriate Google Document.
 	
    c. RISE TAQ staff would check documents at the end of each day to do three things:
 	
        i. Schedule an event in Salesforce for the Activation call assigned the appropriate RISE staff member who would make the call.
 	
        ii. Move the teacher's Application Status to Interview Scheduled
 	
        iii. Close off all remaining open time slots for the following day (so teachers do not schedule activation calls day of).
 	
    d. Unscheduled Interviews: No formal process is in place but generally teachers have received one reminder.
	3. Scheduling
	
	    a. Google Doc Spreadsheet call schedule example: (Chicago) http://spreadsheets.google.com/ccc?key=ppZLtfOIfE2kkxXFXYCMIEA
	
	    b. Workflow Rules (5 rules in place – one for each metro Executive Director and one for RISE National TAQ): e.g., *Activation Call Scheduling: Bay Area ED.* Sends an email to teacher – e.g: *Activation Call Scheduling: Bay Area ED*
	
	    c. **POSSIBLE IMPROVEMENT:** Unscheduled Interviews – Workflow – Send a reminder email to the teacher __ days before the App Exit Date reminding him/her to schedule the interview if teacher is still in Interview Required stage.

4. Calls
 	
    a. Script – A script was use for calls. See three related documents in Salesforce Content:
 	
        i. Activation Call Overview
 	
        ii. Activation Call Script and Notes
 	
        iii. Activation Call FAQ
 	
    b. Recording notes – Notes were record in a Salesforce Note	

on the teacher's Contact record. **PROCESS QUESTION:** Should notes be kept on the Teacher Application instead (since it is related to a specific year's application)?	
5. Post-Call Activity - The caller determines whether the applicant should be accepted and makes any notes needed in the Application Notes section. S/he then changes the applicant's status appropriately: a. Accepted b. First Reject (with Reason for Rejection) – a note should be made in the Application Notes as to the reason. The applicant will be rejected within a business day when the First Rejects are cleared. c. Internal Review – if there are additional questions to be discussed	
INTERNAL REVIEW	
Applications are automatically placed in Internal Review if they are submitted with an eligibility flag (i.e. convicted of a crime, dismissed from a school, or under contract). Staff can also place a candidate there if a concern or flag that needs to be resolved internally before a final decision can be made on the applicant.	**POTENTIAL IMPROVEMENT:** Set a workflow rule to task a TAQ staff member (e.g. owner of the Contact record) to reject applicant when App Exit Date is reached.
FINAL DECISION	
1. Once a final decision is made, the Application should be assigned to one of these statuses: a. Accepted b. First Reject – status used when the reviewer does not have authority to reject a teacher (someone else will have to do a daily review of first rejects). It is also used when a teacher has just submitted an application and they are to be rejected but RISE wants to delay it 1-2 days so the rejection does not happen the day the application is submitted or the day an activation call is done. c. Rejected – also put a value in the Reason for Rejection fields to explain why	1. Final Application Statuses a. Accepted – Workflow Rule: *Acceptance Email*. Acceptance email is automatically sent to the teacher. Currently using email template *2009 Accept: End of Season*. **NOTE:** Need to change email template attached to this workflow rule. b. First Reject, Rejected, Other – need to set Reason for Reject and manually send appropriate rejection email from the teacher's contact record. 2. Updating Acceptance email messages a. This message is maintained in a Acceptance email template in the TAQ: Applicant Emails folder. 3. Application Status tracking

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     d. <u>Other</u> – for teachers who do not complete RISE processing (e.g. never get a valid reference, don't schedule an interview).

2. Updating Acceptance email messages based on time of year – At various points in the season different message should be used in the acceptance email:

     a. Beginning of season – schools are signing up now; you will be one of the first teachers they see; check back weekly for new openings

     b. Mid-April – Schools hiring now; sign on and check frequently for new positions; be active

     c. End of May/early June – school year ending; principal have competing demands; be proactive in following up

     d. July – schools finishing hiring, RISE tries to keep job posting accurate but realize there may be some delay in them being taken off the Network when filled; principals on vacation; be active in following up and

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     a. At the bottom of the Teacher Application record is the Teacher Application History list. This will show the history of when the Application Status was changed and by whom. This can be useful for tracking issues later on. (See below.)

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Summary of non-automated Application Review Processes:
- Initial Review
- Resume Cleaning – for candidates who will move on in the process after initial review
- First Reject review – recurring review (at least three times/week to clean out first rejects)
- Internal Review – review of teachers in the internal review bucket
- Activation Calls – performing calls; take notes; make final decision; accept or reject
- Reference Re-sends – when reference does not respond after initial contact
- Acceptance/Rejection – there is the potential to set automatic reject for candidates who remain in certain status by App Exit Date

Process that will/may change in 2010
- Activation call scheduling
- Reference follow up – decide how many times will reach out to references and how to schedule as such
- Activation calls – questions about teaching pedagogy and what teacher is looking for should be revisited if they are not being used by RISE in any substantive way

Rough Estimates of Time for Teacher Selection Processes

Estimated TS Process Times	Minutes	per	Instances per 100 Apps (%)	Notes
Initial Review	6	Applicant	100	
Resume Cleaning	2	Resume	50	
First Reject Review	5	Applicant	15	
Internal Review	10	Applicant	4	
Activation Call (prep)	3	Applicant	60	
Activation Call (execution)	12	Applicant	60	
Reference Re-Sends	1	Re-send	40	Includes multiple attempts with same candidate.
Interview Scheduling (weekly schedule)	10	Calendar		Setting up weekly calendar (for each metro)
Interview Scheduling (daily schedule)	3	Applicant	60	Scheduling in Salesforce. Updating Application Status to Interview Scheduled.
Missing Info follow up	3	Applicant	25	Includes multiple communications with same candidate.

Appendix C – Entering Individual Donations
Welcome to the "How to Enter Individual Donations" Guide!

Entering New Donor Prospects
If you are entering an individual donor, create a new **Donor/Household Account (last name, first name).** Once created, add the individual as a contact under the Account. Fill in as much information as possible. This is the record that will be used to send the donor their prospecting letter. If they have an alternative salutation, enter it here. If they use a formal greeting, click the appropriate check box. Select their Relationship to RISE as **Prospect** since they have not yet donated. Enter a quick description in the description field box—how do you know them? If the address you have entered is their work address, enter the company name right above it and check the "Use Company Name in mailing?" box. Click save!

If you are entering a couple, enter only one person as the Account contact (see von Metzsch, Roland). Enter the spouse or partner under Contacts.

For the donor information you can enter Spouse name for each contact and marital status. Under communication status (only for the spouses record), please mark **"Do not mail (provide reason)."** Right below, for the Do Not Mail Reason: select **"Spouse or Household Member."** This will allow the office manager to pull the correct list when running reports for the end of year mailings.

Creating Individual Donation Opportunities

<mark>*Always enter New Opportunities starting from the individual's Contact Record!*</mark>

Fill in the following fields in the Individual Donation Opportunity Record:
- Opportunity Name: "First Name Last Name" 200_ Gift (ex. [Peter Brimm 2008 Gift](#))
- Account Name: Link to the proper account (this is a lookup field-should already be populated with the correct Account name)
- Close Date: 12/31/2008 (this should always be set for the last day of the year that you are prospecting in)
- Stage:
  - Prospecting
  - Interest Established
  - Value Proposition
  - Ask Made
  - Verbal Commitment
  - Closed Won
  - Closed Lost
- Probability: (filled in automatically when you select a stage)
- Amount: **$0.00 (Please fill in zero for every donor. Once a gift is rec'd, CB will update this field. If no gift is rec'd, then reports will accurately reflect that no money came in.)**
- Target Amount: this is the amount that you are asking for from the donor this year.
- Primary Campaign Source: Every donation should be linked back to your individual regional campaigns (this is a lookup field)

Hit save!

After you have entered in this information, the Office Manager will update the following fields if/when a donation is received:

- Type
- Check/Payment Date
- Check Number
- 1st Time Donor
- Online Donation (if applicable)
- Description (if applicable)
- Matching Gift? (if applicable)
- Matching Source (if applicable)
- Stage
- Amount
- Honor/Memorial? (if applicable)

- Anonymous? (if applicable)
- Stock Information (if applicable)

Thank you Letters

When a donation is received, the national office will mark the opportunity as Closed Won. A task is automatically set for the Office Manager to create a Thank You Letter. The OM creates a pdf of the RISE Thank You with the IRS information on it and sends to the ED. They will print out on RISE letterhead (specific for these small thank you notes) and send. Once they have done so, it is up to them to note that they have done so in the description section of the opportunity (ex. "TT sent thank you 11/6/08.")

Appendix D –Operations Guide: Development

Welcome to the Operations Guide—Development Edition!

This guide will take you through the process of entering new foundations, foundation contacts and grant opportunities.

Entering New Donors

Before entering a new donor into the Salesforce database, make sure you search first in order to prevent duplicates. If you are entering an individual donor, create a new **Donor/Household Account (last name, first name).**

- Once created, add the individual as a contact under the Account. Fill in as much information as possible. This is the record that will be used to send the donor their prospecting letter.
  - If they have an alternative salutation, enter it here.
  - If they use a formal greeting, click the appropriate check box.
  - Select their Relationship to RISE as **Prospect** since they have not yet donated.
  - Enter a quick description in the description field box—how do you know them?
  - If the address you have entered is their work address, enter the company name right above it and check the "Use Company Name in mailing?" box.
  - Click save.

If you are entering a couple, enter only one person as the Account contact (see von Metzsch, Roland).

- Enter the spouse or partner under Contacts.
  - In each contact record, enter Spouse name for each and note the marital status.
  - Under communication status (only for the spouses record), please mark **"Do not mail (provide reason)."**
    - Right below, for the Do Not Mail Reason, select **"Spouse or Household Member."** This will allow the office manager to pull the correct list when running reports for the end of year mailings.
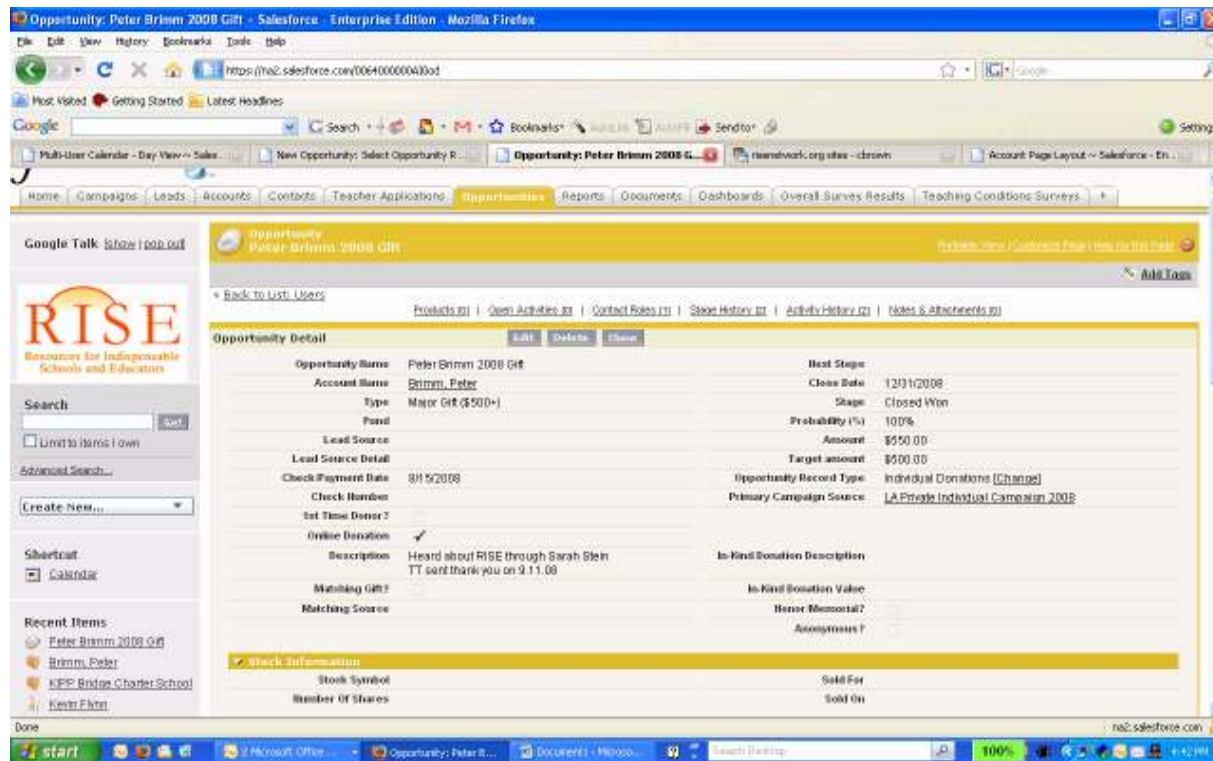
Creating Individual Donation Opportunities

<mark>*Always enter Individual Donation Opportunities starting from the individual's Contact Record*</mark>*! This will ensure that the opportunity is associated with both the Account and the Contact records.*

Fill in the following fields in the Individual Donation Opportunity Record:
- Opportunity Name: "First Name Last Name 200_ Gift" (ex. Peter Brimm 2008 Gift)
- Account Name: Link to the proper account (this is a lookup field and should already be populated with the correct Account name)
- Close Date: 12/31/200_ (this should always be set for the last day of the year that you are prospecting in)
- Stage:
   - Prospecting
   - Interest Established
   - Value Proposition
   - Ask Made
   - Verbal Commitment
   - Closed Won
   - Closed Lost
- Probability: (filled in automatically when you select a stage)
- Amount: **$0.00 (Please fill in zero for every donor. Once a gift is rec'd, OM will update this field. If no gift is rec'd, then reports will accurately reflect that no money came in.)**
- Target Amount: this is the amount that you are asking from the donor this year.
- Primary Campaign Source: Every donation should be linked back to your individual regional campaigns (this is a lookup field)
- Hit Save.

After you have entered in this information, the Office Manager will update the following fields if/when a donation is received:
- Type
- Check/Payment Date
- Check Number
- 1st Time Donor
- Online Donation (if applicable)
- Description (if applicable)
- Matching Gift? (if applicable)
- Matching Source (if applicable)
- Stage
- Amount
- Honor/Memorial? (if applicable)

- Anonymous? (if applicable)
- Stock Information (if applicable)

Thank you Letters

When a donation is received, the national office will mark the opportunity as Closed Won. A task is automatically set for the Office Manager to create a Thank You Letter.

There are two systems in place for ED's: both are detailed below.

System 1:

- The OM creates a word document of the RISE Thank You with the IRS information on it and sends to the ED. They print out on RISE letterhead (specific for these small thank you notes) and send. Once they have done so, it is up to them to note that they have done so in the description section of the opportunity (ex. "AK sent thank you 11/6/08.")

System 2:

- Using Internet Explorer browser only (Firefox won't work)
- Go to Closed Won opportunity
- Scroll to Activity History related list and click on **Mail Merge** button
- From the list of Mail Merge options, choose "Donor Thank You—Individual (Memo)", which will generate a small, memo stationery thank you letter
- Click **Generate** button
- On the actual Thank you Letter make sure the donor's name, donation date and amount are correct. Save and Print this document on memo stationery. Select manual feed.
- Save doc as "First Last Name 200_ Gift_Today's Date" so it should look like this: Stewart Barry 2008 Gift 11.17.08 (by putting today's date, rather than the gift date, you can compare it to the date that the mail merge took place).
- The Log a Call page will pop up as well. Click **Save**.
- On the next screen, scroll back down to Open Activities and click **Cls**. Click **Save** again.
- Prepare the envelopes with addresses, by searching for the contact.

Entering New Foundations

Before entering a new foundation into the Salesforce database, make sure you search first in order to prevent duplicates. To enter a new foundation, select new account and choose General record type.

- Once created, fill in as much of the following information as possible:
  - Account Name
  - Type (select Foundation)
  - Phone

- o Fax
- o Website
- o Description (short explanation of what they do)
- Under Foundation Application Process
  - o Application Deadline 1 and 2 (these are important fields when it comes time to run reports)
  - o Award Date 1 and 2 (these are important fields when it comes time to run reports)
  - o Grant Application Website (link to more information)
- Foundation Giving Parameters
  - o Will Give To (select all that apply) – also an important field when it comes to reporting
  - o Will Not Give To (select all that apply) – also an important field when it comes to reporting

Entering Foundation Contacts
Foundation Contacts are entered as general contacts under the associated foundation account. The most important field distinction is
Relationship to RISE = Foundation Contact.

Entering Grant Opportunities
When entering a new grant opportunity, you may or may not want to associate contact(s) with the opportunity—that is up to the Executive Director's discretion. If you would like to do so, you should create the new opportunity starting from the respective contacts record. The record type you will select for this will be Grant.
Once created, fill in as much of the following information as possible:
- Opportunity Name: "Foundation Name 200_ Grant" (ex. Green Foundation 2008 Grant)
- Account Name: Link to the proper account (this is a lookup field and should already be populated with the correct Account name)
- Target Amount—the amount the ED is asking from the foundation
- Stage
  - o Prospecting
  - o Letter of Interest
  - o Grant Proposal
  - o Negotiation/Review
  - o Closed Won
  - o Closed Lost
- Type = Grant Proposal
- Primary Campaign Source (grant should be linked to a campaign for reporting and tracking purposes) (ex. 2008 Foundation Fundraising Campaign)
- Description
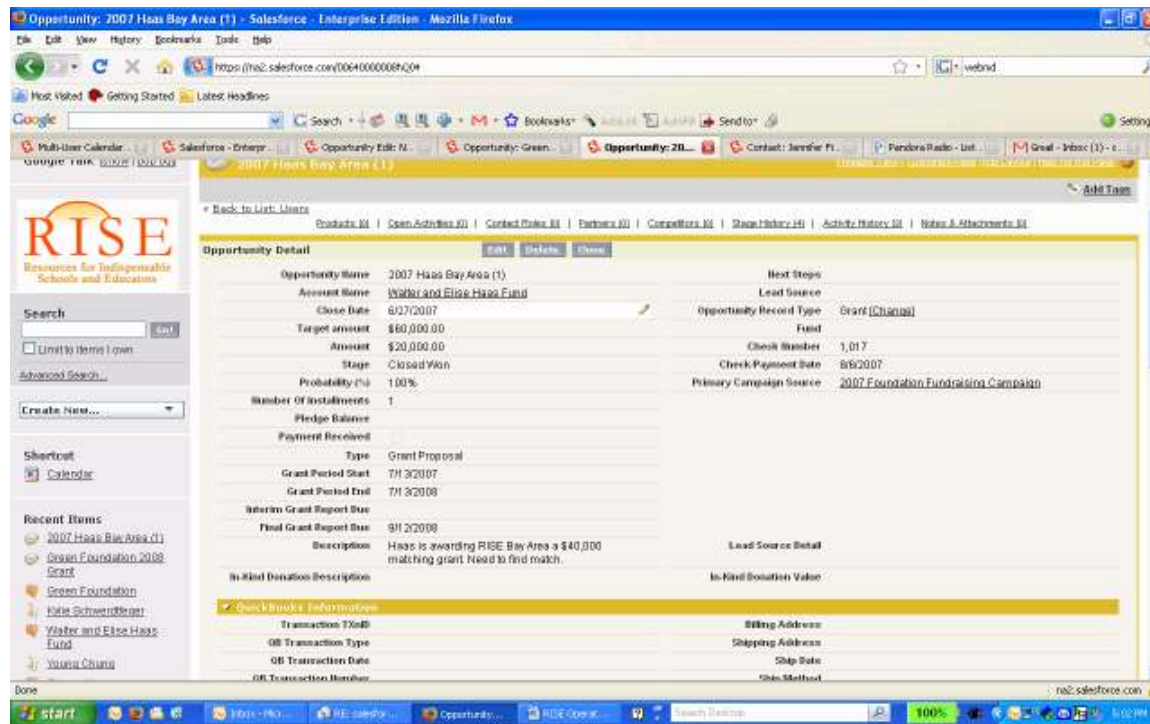
The following fields should be completed as the grant moves through the decision process:

- Close Date—date the grant is Closed Won
- Amount—final amount that is Closed Won
- Stage should be updated throughout the process
- Payment Received (to be completed by OM once check is received)
- Check Number (to be completed by OM once check is received)
- Check/Payment Date (to be completed by OM once check is received)
- Grant Period Start—should be noted on letter from foundation
- Grant Period End—should be noted on letter from foundation
- Interim Grant Report Due—should be noted on letter from foundation (important for reporting and task purpose)
    - Once this date is known a task should be assigned to the appropriate person 3 weeks in advance of the deadline.
- Final Grant Report Due—should be noted on letter from foundation (important for reporting and task purpose)
    - Once this date is known a task should be assigned to the appropriate person 3 weeks in advance of the deadline.

==**All relevant documentation should be posted to Salesforce as well (LOI, grant proposal, emails, etc.).**==

Appendix E—Salesforce Guide for RISE Management Team
Welcome to the Salesforce Guide for RISE Management Team!

Contents
1. Introduction
2. Tracking School Membership
   a. **School Membership Opportunities (SMO)**
3. Tracking Survey Implementation
   a. **School Teaching Conditions Surveys Objects (TCSO)**
4. Tracking Match Making
   a. **RISE Job Opportunities (RJO)**
5. Reports
6. Tracking Principal Feedback on AJS
7. Matches/Invoice Procedure

1. Introduction
This guide is to track relationship management for schools during the sign up/renewal process, survey implementation and match making seasons. Individual customized reports can be made to track your own daily/weekly management of these processes.

2. Tracking School Membership

The Why
We each have a lot to manage during the process of signing up schools between outreach and cultivation. The main tool we have to help keep track of all of it – especially when you are talking upwards of cultivating 75 schools to potentially yield 50 schools – is Salesforce (no surprise!) and especially **Salesforce Accounts and Opportunities**.

More specifically, the values for these fields illustrate their importance:

Metro Location (9/25 Note: These will be revised to reflect new outreach strategy.)
- San Francisco Bay Area
- Chicago

- Los Angeles
- New York

School Type
- Charter
- Small Autonomous District
- Traditional District
- Autonomous District
- Other

School Category
- Elementary
- Middle
- High
- Other

Next, create **School Membership Opportunity (SMO)** and start treating like a contact.

Example of School Membership Opportunity
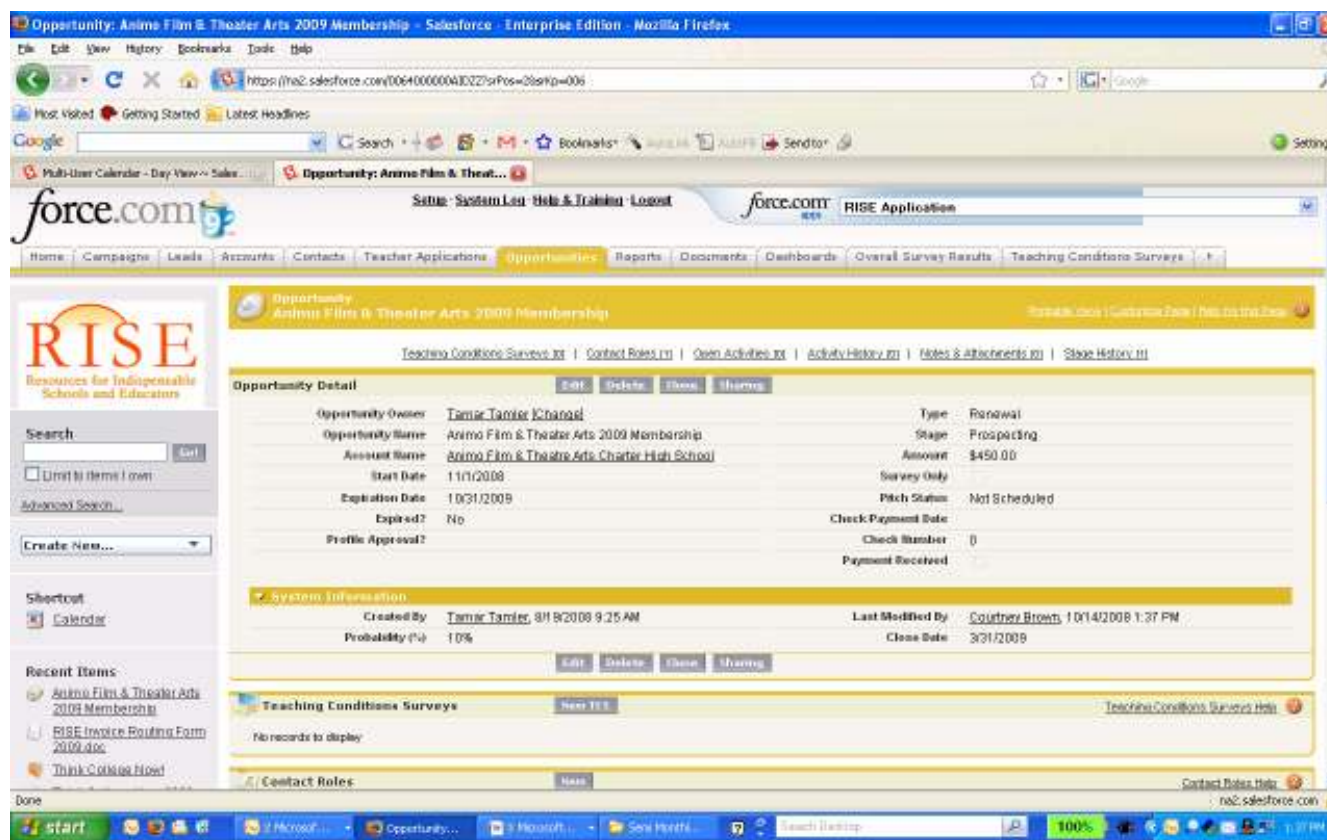
Renewals: Outreach to Sign Up

Because renewal schools are already in Salesforce as an **Account** and principals have **Contact Records**, the process of tracking outreach to sign up is done from the beginning through a **School Membership Opportunity (SMO).** Trust us. Using the opportunities is great because you can easily see where you are in the sign up process with any group of schools at any given time. It makes it super easy to track against your goals as well.

Create an **SMO** for each school that was a member in 2009 (new opportunity type = **RISE Membership**).

For consistency, please complete the following fields.

- **Opportunity Name**: "School Name" 200_ Membership
- **Close Date:** for consistency, please use **3/31/2010** (this is the close date because we want all schools to administer the survey at least in April, if not November. It's unlikely that if a school hasn't signed up by this date that they will be able to administer the TCS)
- **Start Date**: 11/1/2009 (We will start accepting teacher applications in November and will start administering the survey then as well.)
- **Expiration Date**: 10/31/2010
- **Amount:** $750 (Whatever the membership fee is, in cases where you have discounted the membership fee for some reason, indicate the fee and then write a note in the notes section that explains why it was discounted…e.g. "$225 – promotional membership fee for signing up in August"). Having the amount information in the opportunity record is helpful when pulling reports for accounting and billing.
- **Stage:** this is a very important field that you change according to where you are in the process of signing up a school. They should be pretty self explanatory.
  - ○ Prospecting
  - ○ Rejected—select this if the management team decides (with the President's approval), that we are not going to extend membership to the school. RISE does not want to pursue membership with them (ie. because they bounced a check, etc.). This stage will not be common.
  - ○ Accepted—the school has verbally said they want to partner with RISE and we want to partner with them, but do not have their contract in hand. The management team will notify them that it is necessary to update their portal profile and it will be open at this stage.
  - ○ Contract Received—we have the contract in hand. Portal is also open at this point.
  - ○ Lost: If a principal clearly says that he/she will not renew membership.
- **Contact Role * (**this step is important because it will allow you to run more robust reports, trust me).
  - ○ Search for the **RISE Principal**
  - ○ Mark as **Primary**
  - ○ Role Type = **School Principal**

Please note: All school principals should have a Contact record type of "RISE Principal.'' Any other non-teaching staff members (ie. Assistant Principal, Counselor, etc) should have a Contact record type of "RISE School Contact."

Once the TCS threshold has been reached by a school they will be able to update their profile on the portal. Once this has been completed on the portal by the RISE principal, a task is automatically sent out through Salesforce to the appropriate staff member asking them to review the school profile. The staff member then goes back to SMO and (from the dropdown list) selects Yes or No from **Profile Approval? The schools portal profile is not active until this step is taken by the RISE staff member.**

The principal will receive an email saying their profile is active. The system will work much as it did last year—the staff member will be able to modify the stock email in the system if necessary (more details to come).

Other: Schools that have signed up w/ RISE in the past but not technically renewals
This third category needed to be created because although these schools are not renewals for 2010 (i.e. they were not School Partners in 2009, but partnered with us at some point in 2007 or before), they have in the past created RISE School Profiles, so they exist as an **Account** and **Contact** in Salesforce. Just follow the renewal procedure above.

3. **Tracking Survey Implementation**

The Why
To make sure we are keeping the process clear as well, we use a **Teaching Conditions Survey Object (TCSO) that we now relate back to the school account and to the yearly school membership opportunity.**
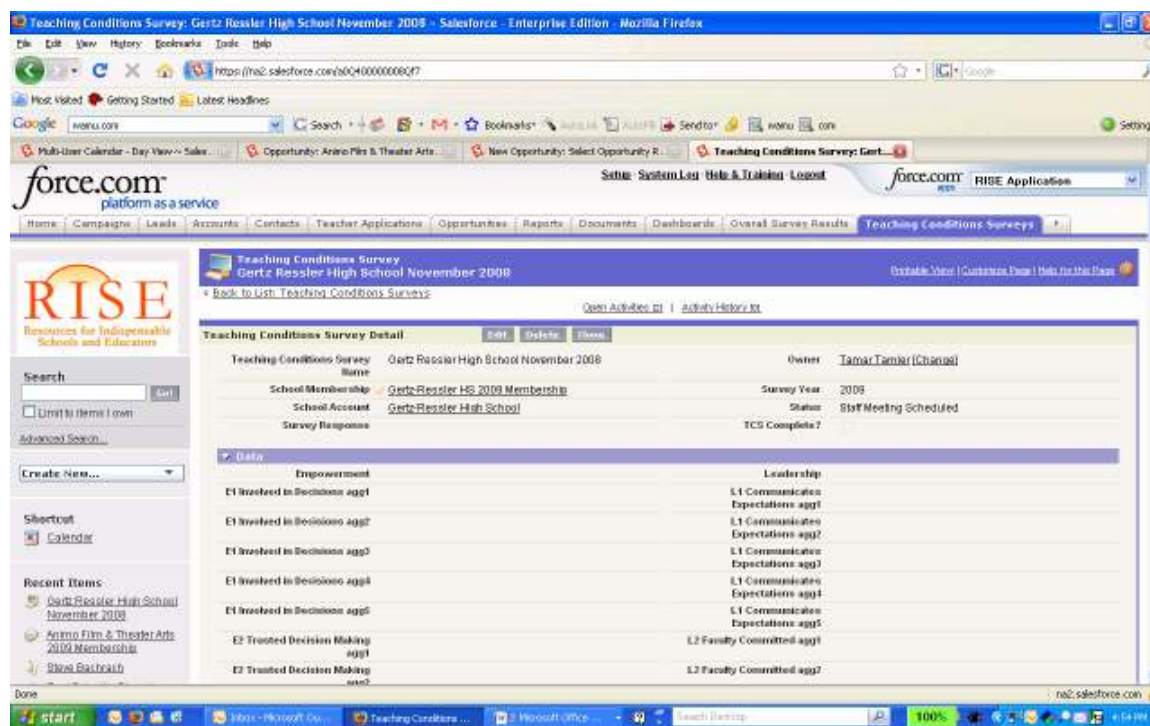
Using this object
At the point where the membership opportunity is accepted, staff member should create a **TCSO**. The TCS is now its own object on Salesforce and it has its own tab (see screen shot above).

For consistency, please complete the following fields.

- **Teaching Conditions Survey Name**: "School Name" Winter (or Spring) 200_ (if the school is implementing 2 surveys, staff member should create both TCSO at the same time; since you are able to clone it will be faster)
- **School Membership:** select the associated school membership opportunity
- **School Account**
- **Survey Year: 2010**
- **Status:** this is a very important field that you change according to where you are in the process of signing up a school. They should be pretty self explanatory.

- o Scheduled
- o Not yet reached threshold %
- o Complete

On the portal, the system pulls up the TCS data in the Salesforce TCS object when the **Ready to Publish? (*)** box is checked. Procedurally, this means that the staff member and the Director of Operations must work together on this process.

- Until the TCS data is loaded into the record from the raw data Excel, the ready to publish checkbox should not be checked. The Director of Operations will load the data once the raw data has been compiled for the scheduled presentation.
- After the staff member finishes the data meeting, the staff member should then go back into the TCS object and check the **Ready to Publish?** box. Information on the TCS tab will not be loaded on the portal until this checkbox is selected.

Finally, the **Survey Response** field is a text box for staff members to make notes regarding any details they find important in relation that the TCSO (ie. notes that used to go in the "description" field in the old WCS Opportunity could now go in this field.)

Tracking Match Making

The Why
This is the bread and butter of RISE! Our goal as regional directors is to help schools attract and retain experienced, effective teachers. The **RISE Job** opportunity type **(RJO)** is used to track teachers who are hired by RISE schools.

RISE Job Opportunities (RJO) are created in Salesforce when a principal adds a job through the portal. The integration automatically creates the opportunity. The DirOps can add a job for a principal by logging in to the portal on their behalf. This is only necessary when you hear about a Match Made and that opportunity was never in Salesforce.

When you hear about a match, either from the teacher or principal, search in Salesforce for that **RJO** to update. It will be attached to the school Salesforce **Account**.

If the job opportunity does not exist—because the principal didn't enter it into the RISE Portal—you will need to create a new one.

For consistency, please complete the following fields.

- **Opportunity Name**: "School Name" – "Subject" – "Grade" (ex. Animo Jackie Robinson Charter High School – English/Language Arts -12)
- **Amount:** $1,200 (or other amount)
- **Close Date:** complete when the position is filled
- **Expiration Date:** 10/31/2010
- **Stage:**
    - Match Made – change the opportunity stage to this when the match is made **
    - Failed Match
        - This field is if you find out a match has been made, but then it falls through for some reason. It is important for us to keep overall numbers over the course of the year.
    - Closed – SL (closed by school leader)
        - If you find out that the principal hired a teacher who is on the RISE Network, add a **contact role**
            - Search for **Teacher**
                - Role Type = **Soft Match**
    - Closed – RISE
    - Open

- **Match Information**
  - Under this related list—search for the name of the matched teacher and add any pertinent notes in the description field
- **Close Out Survey**
  - Check the "Closed by School" box if appropriate
  - Select the appropriate "Reason Closed" from the drop down
- **Contact Role * (**this step is important because it will allow you to run more robust reports, trust me). You will be creating **2 contact roles** when a **match is made**.
  - Search for the **Teacher**
    - Role Type = **RISE Match**
  - Search for the Principal
    - Role Type = Principal
    - Mark as **Primary**

** As of 4.21.09 there is a glitch in Salesforce that does not allow you to edit an RJO that has been changed to status "Match Made" by API User (through the portal). This means that in order to update "Amount", "Match Information", etc. you will need to edit the RJO status from Match Made to Closed-RISE, hit Save, then edit again back to Match Made and make any additional changes.

Protocol for Tracking Matches

(As of 5.29.09, the following protocol is in place to track matches on the RISE Network.)

- Director of Ops will track deactivation attempts through a Salesforce report
- When a match is suspected, OM to send message to both teacher and principal (to find out what position was filled) for confirmation.
    - If necessary, a team member will be asked to help with confirmation.
- Once confirmed on both ends, OM will update Salesforce to reflect the match.
- DirOps is able to track matches via report in Salesforce.

Reports

During the program year, it is necessary to track all of the above information. The folder, Flash Reports, in the Report tab of Salesforce will guide the management team through the needed information.

Active Teachers (Matching) – this report gives you a breakdown of active teachers by Desired Metro Area.

Active Schools (Matching) – this report gives you a breakdown of active principals on the network by Metro Location.

School Survey: Status – this report is broken down by Metro Location and gives a summary of all current year partners and where they are in the TCS process. Filter should reflect current survey season (ie. Winter 2010).

School Membership Stages – this report is broken down by Metro Location, Stage and Category. Use this to get a snapshot of current prospecting progress.

School Membership – this report is broken down by Metro Location, Type Category. Use this report to breakdown numbers for new and renewal schools.

Internal Review Breakdown – this report shows only applications under internal review broken down by status.

Total # of Current Apps – this report is broken down by Metro Location and App Status General. Use it to get a snapshot of total application numbers across metros.

Subject Reports – this report is broken down by Metro Location and Application Status General and filtered by subject.

Tracking Principal Feedback on AJS

The Why
We want to make our selection process is the best it can be. The feedback from principals about candidates is incredibly valuable, yet we need to balance the fact that principals have different ideas of quality. While RISE National takes the lead on using this feedback to guide program decisions, it is a Regional Director who hears it. Hence, the need for the feedback loop detailed below!

Generally, a teacher needs two strikes against him/her for RISE to "investigate" further if it's a quality issue. If it's a misrepresentation question, the issue is investigated immediately. The details of that process are in the National guidelines.

Documenting Feedback
- Create a **note** in the teacher's contact page with:
  - Subject: Red Flag from *Principal's Name – Date*
  - Include feedback in the body of the note documenting what the principal said or wrote about the teacher
  - Example: Red Flag from Brian Greenberg- 5/11/2007
- Send the Dir Ops an email with the link to the Red Flag Note

Matches / Invoice Procedure

Regional Director Responsibility:
When a match is made (and confirmed by both sides), the Job Opportunity Status should reflect the **Match Made** change (as this should be delivered through the portal). If it is not yet changed, go ahead and change the status to **Match Made**. If it does not yet exist, create a new opportunity per notes above. <mark>Make sure the **Amount, Match Information** and **Contact Roles** are properly updated.</mark>

Director of Operations:
Prior to the Invoicing run, a Salesforce Report of Job Opportunities with status "Match Made" should be run (since the last date of invoicing).

Invoices for placements are sent in the same form (e-mail or paper) as the contract invoice. After sending the invoice, create a task in Salesforce, attached to that Job Opportunity with Subject: Invoice Sent.

Once an invoice has been paid, the box Payment Received should be checked," the Check/Payment Date should be completed, and the Check Number entered.

Any additional follow up done to make sure payment is received should be tracked in SF as emails, tasks, calls, etc attached to that Job Opportunity.

Appendix F—Using Salesforce for Goal Reporting
Using Salesforce for Goal Reporting

The Why
Our goal in 2009 is to streamline our various reporting measures for To Do Meetings, Monthly Meetings and end-of-year reviews. By using SF tasks, we will document activity and goals in one central place!

Tasks
Salesforce tasks are a powerful tool for helping us achieve goals. We track our progress towards monthly goals, as well as the way we are using our time. This allows us to manage workloads, reflect on time allocation, and plan effectively for future goals.

Rationale for 4 levels of tasks

Year ⟶ Quarter ⟶ Month ⟶ Week
(2009)   (Q1,2,3,4)   (Goals/Subtasks)   (Tasks)

There should be various levels of tasks driving our goals starting in January. Setting our yearly goals drive our quarterly goals which help set our monthly goals and lead us to our weekly tasks. Our year end reviews will be driven off of our yearly goal set from January which will be captured from a report and posted in Salesforce.

The Goal Reporting Process-Full Year
Step 1: In January, supervisor and staff member are responsible for setting yearly, quarterly and Q1 monthly breakout goals.
Step 2: Yearly goals should be entered by every staff member. Those goals are to be reviewed once more and then signed off on by both individuals. Report will be kept on file in Salesforce.
Step 3: Q1 and January goals are to be entered in Salesforce before first monthly meeting of the year by creating new tasks.
Step 4: At the beginning of every quarter, staff members are required to enter their quarter goals in Salesforce.
Step 5: At the end of the year, supervisor and staff member will use yearly goals as the basis for end of year review rubric.

Using Tasks for Yearly Goals
The 1st level of tasks we are going to use is for yearly goals. Our year end review process will be driven by the goals that are set at the beginning of the year. In order to capture these goals we need to enter them into Salesforce as tasks, pull a report and then post in Salesforce Content. You will review the goals with your supervisor and both parties will sign off on them. Follow the steps below to begin:
Step 1: From your Salesforce Home Tab, create a new task.
Step 2: Fill in the following fields:
- Subject: **2009 (or appropriate year)**
- Status: (by marking yearly tasks as complete they will not appear on your home page, but will still be available for reporting purposes)
  - Not yet started
  - In process
  - **Completed**
  - Waiting on someone else
  - Deferred
  - Missed
- Category: **(Choose the category that fits the overall yearly goal)**
  - TAQ: Teacher Acquisition (includes design & implementation)
  - TS: Teacher Selection
  - SM: School Membership (anything that refers to school outreach and matching)
  - MATCH: Matching Activities
  - SUR: Survey (includes design & implementation)
  - MISC (CUST)
  - TECH: technology (Salesforce, Backend, Website)

- o MKT: *Temp's category (market growth and strategy)*
- o BRD: Board
- o DEV: Fundraising and Development
- o ASMNT: Assessment
- o HR: includes new hires, inductions and internal team policies
- o ACCT: Accounting
- o MISC (FIN)
- o PD: Professional Development/Learning and Growth
- o MISC (L&G)
- o STRAT: Strategy
- o COM: Communications
- o MISC: Miscellaneous, but only use this one if you cannot fit the task into one of the categories above
- Balance Scorecard: **This is an auto fill field**
  - o If category = TAQ, SA, SUR, MATCH, MISC (CUST)
    - Balanced Scorecard = Customer Development
  - o If category = PD, MISC (L&G)
    - Balanced Scorecard = Learning and Growth
  - o If category = TECH, MKT, BRD, ASMNT, HR, STRAT, MISC
    - Balanced Scorecard = Key Business Processes: Processing, Stakeholder Communications
  - o If category = DEV, ACCT, MISC (FIN)
    - Balanced Scorecard = Finance
- Goal: **Type in a description of your yearly goal here**
- Report: Goal Type: **Yearly**
- Save and repeat for next yearly goal.

Step 3: Once all goals are entered in as tasks, go to the Report tab.
- From the To Do Meeting Reports folder, select the Yearly/Quarterly Goal Report.
- To pull your yearly goal report, make sure the filter **Report: Goal Type** equals **Yearly**
- Select Printable View and export to excel.
  - o Save the file as "Your initials Year Yearly Goals" (ex. CB 2009 Yearly Goals)
- If you would like to save the report, please **Save As** and keep in your personal report folder.
- In Salesforce Content, post the excel file to the **Goal** Workspace.

Using Tasks for Quarterly Goals

Just as we use tasks for yearly goals, we want to use them to document our 2nd level of tasks or quarterly goals. We can use the same process as we did for our yearly goal entry.

Step 1: From your Salesforce Home Tab, create a new task.

Step 2: Fill in the following fields:

- Subject: **Q1 (or appropriate quarter: Q2, Q3, or Q4)**
- Status: (by marking quarterly tasks as complete they will not appear on your home page, but will still be available for reporting purposes)
    - Not yet started
    - In process
    - **Completed**
    - Waiting on someone else
    - Deferred
    - Missed
- Category: **(Choose the category that fits the overall quarterly goal)**
- Balance Scorecard: **This is an auto fill field**
- Goal: **Type in a description of your quarterly goal here**
- Report: Goal Type: **Quarterly**
- Save and repeat for next quarterly goal.

Step 3: Once all goals are entered in as tasks, go to the Report tab.

- From the To Do Meeting Reports folder, select the Yearly/Quarterly Goal Report.
- To pull your quarterly goal report, make sure the filter **Report: Goal Type** equals **Quarterly**
- Select Printable View and export to excel.
    - Save the file as "Your initials Year Quarter Goals" (ex. CB 2009 Q1 Goals)
- If you would like to save the report, please **Save As** and keep in your personal report folder.
- In Salesforce Content, post the excel file to the **Goal** Workspace.
- *It is also possible to pull your yearly and quarterly goals into one report. To do this, go to the Yearly/Quarterly Goal Report and make sure the filter **Report: Goal Type** equals **Yearly, Quarterly**.

Using Tasks for Monthly Goals

The 3rd level of tasks is used for monthly goals. These tasks should be entered at the beginning of every month and monitored as you make progress throughout the month using the status function. Again, the process is similar to the yearly and quarterly task entry.

Step 1: From your Salesforce Home Tab, create a new task.

Step 2: Fill in the following fields:

- Subject: **January (or appropriate month)**

- Due Date: **End of the month** or more specific date depending on where it falls in your project plan (ex. If entering January goals, 1/31/2009)
  - *This field helps you project manage! It can break down the month into manageable chunks, plus it helps us see if our monthly projects are aligned with others' monthly projects in regards to timing and expectations.*
- Status: (To document your progress on the task, you should change the status throughout the month and make a final update for the end of month report. If the goal is **Missed**, you should mark it as such and then you can **Save & New Task**. This will allow you to carry the goal over to the next month)
  - **Not yet started**
  - In process
  - Completed
  - Waiting on someone else
  - Deferred
  - Missed
- Category: **(Choose the category that fits the monthly goal)**
- Balance Scorecard: **This is an auto fill field**
- Goal: **Use this field to type in a description of your monthly goal**
- Monthly SubTask: Use this field to document subtasks related to the overall monthly goal (some monthly goals may not have subtasks related to it)
- Report: Goal Type: **Monthly**
- Save and repeat for next monthly goal.

Step 3: Once all goals are entered in as tasks, go to the Report tab.

- From the To Do Meeting Reports folder, select the Monthly Goal Report.
- To pull your monthly goal report, make sure the filter **Report: Goal Type** equals **Monthly**
- Select Printable View and export to excel.
  - Save the file as "Your initials Month Year Goals" (ex. CB Jan 2009 Goals)
- If you would like to save the report, please **Save As** and keep in your personal report folder.
- In Salesforce Content, post the excel file to the **Goal** Workspace.

Please adhere to the following color system when reporting back to the team during the monthly meetings. Simply highlight _only_ the status field on the excel sheet according to the colors below:

In Progress

| In Progress | 1/30/2009 | January |

Completed

Completed 1/30/2009   January

Missed
Missed   1/30/2009   January

Waiting on Someone Else
Waiting on Someone Else   1/30/2009   January

Deferred (also Blue)

Please do not highlight goals in grey as this is too similar to the coloring of the printable view. Any goals that you would like to discuss during the meeting can be noted in column in F with a checkmark (or other symbol).

Appendix G—To Do Reporting using Salesforce

Individual Responsibilities:
Your To Do tasks should be associated with the subtasks and monthly projects that are part of your monthly goals.

To keep track of the To Do items, complete the following fields for **tasks and events.**

Task Information
1. **Subject**:
2. **Due Date**: when you are planning to complete it – *this will help us figure out if we are aligned in our deadlines and set expectations of people's time*
3. **Status**: default is Not Started – you can change this as you make progress
4. **Assigned From:** Fill in this field if you have assigned a task to someone. It will help the moderator (as well as the person to whom the task was assigned) know who is involved in the task.

Other Information
1. **Category:** See list at the bottom of this sheet to know how to assign tasks
2. **Balanced Scorecard:** Fill it out (there will be only 1 choice / *I am trying to figure out how to get it to auto fill, but that will be To Do 2.0*
3. **Report: To Do: KEY FIELD that drives all reports**
   - Personal
   - Common (if you want the task to appear on common To Do)

Description Information
1. **Comments:** This section will be used to report our Big Picture Priorities and Last Week's Achievements.
   - Subject of Task = **Big Picture Priorities** *(do not associate with a category)*
     - Due Date = Set as the Monday of the To Do Week
     - *Tip: Mark the Status as **Completed** so that it does not appear on your list of current tasks on your Home page*
     - Report: To Do = Common
     - List as 1) 2) 3) in the Comments section
   - Subject of Task = **Last Week's Achievements** *(do not associate with a category)*
     - Due Date = Set as the Monday of the To Do Week
     - *Tip: Mark the Status as **Completed** so that it does not appear on your list of current tasks on your Home page*
     - Report: To Do = Common
     - List as 1) 2) 3) in the Comments section
     - Please try to limit the number of achievements to **3** per week.

Categories
- **Category**:
  - **Customer Development**
    - TAQ: Teacher Acquisition (includes design and outreach implementation)
    - TS: Teacher Selection
    - SM: School Membership (anything that refers to school outreach)
    - MATCH: Matching Activities
    - SUR: Survey (includes design & implementation)
  - **Learning and Growth**
    - PD: Professional Development/Learning and Growth
  - **Key Business Processes**
    - TECH: technology (Salesforce, Backend, Website)
    - COM: communications
    - ASMNT: Assessment
    - BRD: Board
    - HR: includes new hires, inductions, internal team policies, ED check-in
    - MISC: Miscellaneous, but only use this one if you cannot fit the task into one of the categories above
    - MKT: *Temp's category (market growth and strategy)*
    - STRAT: Strategy

- PTO
  - **Finance**
    - DEV: Fundraising and Development, Follow-ups/Research, Handwritten Thank you
    - ACCT: Accounting

- *Upcoming Events and Trips (not an official category)*
  - If you have an EVENT or TRIP that you want the team to be aware of, click the **Report: To Do Field** and select "**Common**" when creating the event.
  - If you are going to be out of the office (i.e.. traveling for a few days), you should create an All Day Event (i.e.. Subject "Temp in NYC") and mark it for the Common To Do.
  - PTO should also be marked as common so that the team is aware of out of office time

RISE Facilitator's Role

All common tasks should be in Salesforce no later than **8:30 a.m. PST** Monday morning. It is the responsibility of the Facilitator to pull the Common To Do Report. The rotation schedule is located in the Description Information of the To Do event.

- Go to the Reports Tab in Salesforce
- Select the To Do Meeting Reports Folder
- Click on the Common To Do
- Change the date parameters (Start Date and End Date) to the current week and hit Run Report
- Save the report and then hit Printable View
- Add Last Weeks Value to the top of the Report and then choose This Weeks Value (our values are located in the HR Workspace in Content)
- Save the report as Common To Do "Date" in Salesforce Content
  - Please save in the Meetings Workspace
  - The name of the file is "Common To Do"
  - Click on the file name—this will take you to the Content tab. Once there, click Edit and select **Upload New Version.** Browse to the file on your computer and in the text field that asks for the Reason for Change enter "Week of Date" (ex. Week of 3.3.09) and hit Save.

Exporting the Report to Excel
- Choose Printable View from the Report Screen

- o If you're only options in the "Opening Report" Window are Firefox and Other, you will need to perform the following steps in order to open the file in Excel.
- Select Other
  - o Go to My Computer
  - o Local Disk (C:)
  - o Program Files
  - o Microsoft Office
  - o Office10
  - o EXCEL (Double Click)
  - o Hit Okay
  - o Report will now open in Excel

Using the tasks for time management
At the end of the week, go through your To Do report and indicate if the task has been completed, missed, deferred, etc.

If it was missed, chances are it needs to go on the next week's To Do.

- Easy to do – **Save and New Task**

Or, if you think of something that needs to be done next week, just create the task and put the due date to next week, click To Do and you will have started the list

Appendix H: Salesforce Content Guide

What is Salesforce Content?
Salesforce Content will help us organize, share, search, and manage content within RISE and across key areas of the Salesforce application. Content can include all file types, from traditional business documents like PowerPoint presentations to video files, Web pages, and Google docs.

It simplifies content management by incorporating user-friendly features into the following tasks:

Organizing
Rather than keep files in folders that make content difficult to find, Salesforce Content stores files in fully searchable file repositories known as workspaces. Administrators can create multiple workspaces based on any classification, such as department name, job function, or team, and then configure user permissions within the workspace to balance content access with security. At RISE, we have configured the workspaces to mirror our balanced scorecard categories. Authors assign descriptive labels called tags to help classify and

organize content across workspaces. You can view a list of all content that belongs to a particular tag or filter search results based on a tag or tags.

Searching

The powerful Salesforce Content search engine scans the *entire body* of the document as well as content properties such as the title, description, tags, categorization data, and author name. You can filter searches by featured content, file format, author, tags, workspaces, or custom fields and then view the results with various levels of detail, providing an easy way to find relevant content quickly. The "smart bar" graphic for downloads, comments, ratings, and subscribers allows you to compare documents within a search result set. Our additional search criteria include:

- Audience
  - Internal Use Only
  - External-Draft
  - External-approved
- Review Date
  - If document should be updated at a later date, include date here.
- Category
- Balance Scorecard
- Year Created
  - To help with archiving

Subscribing

Once a file is located, subscribing to it ensures that you receive an email notification when new versions are published or changes are made to the file's properties. You can also subscribe to authors, tags, and workspaces, thus reducing the time spent searching for new or updated content. Notification emails will arrive real-time or once daily, depending on your preferences.

Previewing

In Salesforce Content you do not need to download a large document to determine if its content is relevant to you. The preview function provides document details at a glance, including document title, author, description, tags, workspaces, comments, votes, versions, subscribers, and downloads.

Contributing

Uploading new or revised files in Salesforce Content is fast and easy. During the upload process you choose a workspace and content type for your file or Web link, write a description, assign one or more tags, and fill out any customized fields that help categorize and define your content. Version management does not require checking files in and out, rather, you simply upload a new version of the file and Salesforce Content maintains a version list accessible from the content details page. You can download past versions of a file and read all reason-for-change comments that an author may have included with a new version.

Reviewing Usage and Providing Feedback

Salesforce Content provides several methods for determining whether content is valuable to readers. Featuring a piece of content increases its visibility in search results. Voting thumbs up or thumbs down on a file, Web link, or Google doc and adding comments allow you to participate directly in content improvement. You can also see who has subscribed to a file, link, or doc and how many times files have been downloaded.

Sharing Content in Salesforce

Salesforce Content is also integrated with leads, accounts, contacts, opportunities, cases, products, and custom objects. Because Salesforce Content functionality is enabled on the Opportunity tab, for example, Salesforce Content uses the fields on the opportunity detail page to search for files that may be relevant to that opportunity. You can drill down in the search results as needed or run your own search and then attach one or more files to the opportunity. The most current version of the file will be available on the detail page for the life of the opportunity.

Content Tabs

Salesforce Content is a group of two tabs. Both of the tabs are related and work together.

1. **Content**

Clicking the Content tab displays files and Web links published in Salesforce Content workspaces. The top twenty most recently modified items are listed by default. You can filter the list using the Filter Your Results sidebar.

To search for specific content:

1. From the Search drop-down list, restrict your search to a specific workspace or choose to search in all workspaces.
2. Enter your search term(s) and click **Go!**. Salesforce Content performs a full-text search of all documents in your workspace(s).
3. Optionally, in the Filter Your Results sidebar, filter your search results by file format, featured content, author, tag, workspaces, content type, language, or a RISE custom field. The number in parentheses next to each filter type shows you how many matching files, Web links, and Google docs are in the search results.
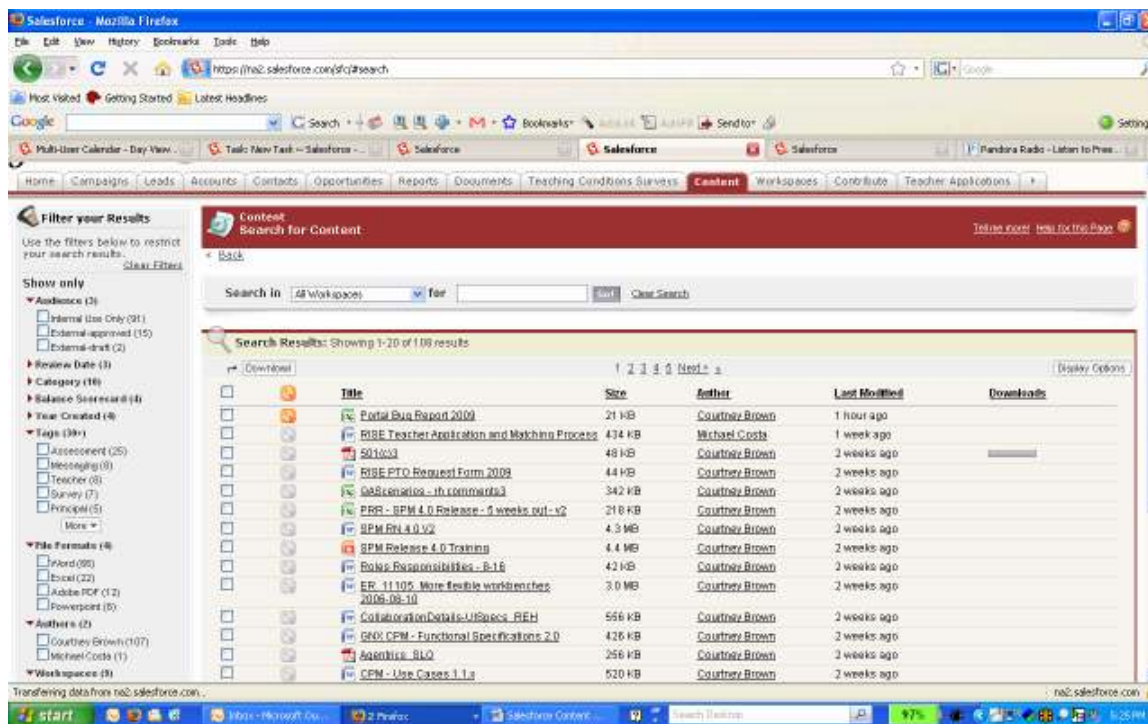
Clicking a file name on the Workspaces, Content, or Subscriptions tabs opens the content details page, which is a central access point for information about a particular file, Web link or content pack in Salesforce CRM Content.

The following options are available on the content details page depending on the type of content you are viewing, your workspace permissions, and whether the content is in a public or private workspace:

- Click the thumbs up or thumbs down icon to vote for the file, Web link and content pack. To change your vote, click the opposite icon. After you cast a vote, the Recent Activity list on the Workspaces tab indicates whether you like or dislike the content.
- For Web links, click the **Open** button to open the Web page in a separate window. For files, click the **Download** button to open or save the file.
- Click **Subscribed** or **Not Subscribed** to toggle your subscription on or off.
- For content packs or presentations, click **Clone & Customize** to create a new pack or presentation by adding or removing files and slides. Salesforce CRM Content saves or publishes your customized pack or presentation as new content, not a version of the pack or presentation you copied.
- Click **Edit | Edit Details** to modify standard and custom fields.

- Click **Edit | Modify Presentation** to [create a new version of a presentation](#) by adding or removing slides. Click **Edit | Modify Content Pack** to [create a new version of a content pack](#) by adding or removing files.
- For files, click **Edit | Upload New Version** to [replace the file](#) with a new version. The version option is not available for Web links or content packs.

2. **Workspaces**

Clicking the Workspaces tab opens the workspaces home page. On the home page you can access your personal workspace, create new workspaces in Salesforce CRM Content, choose a specific workspace to view or edit, and analyze workspace usage and activity. The workspaces home page has two tabs: Shared Content and My Personal Content.

The workspaces home page contains the following sections:
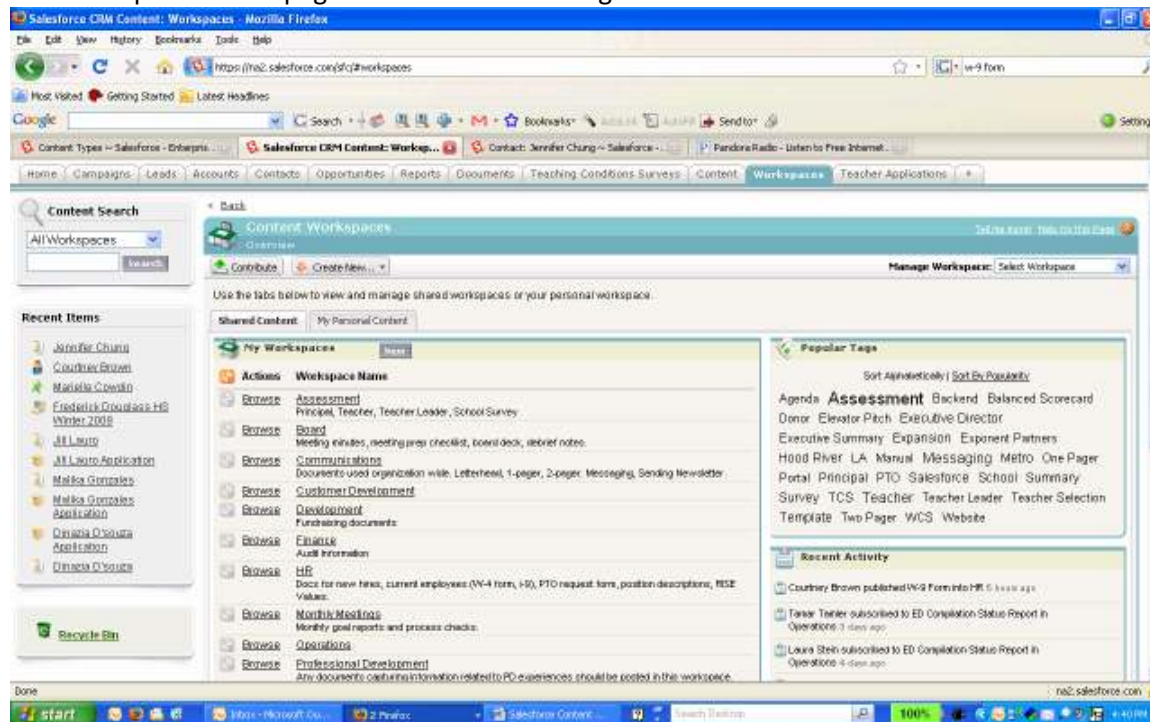
My Workspaces

This section lists all the workspaces to which you have access. Click a workspace name to view details about that workspace or click **Browse** to view a list of all the content in the workspace. Click the **New** button to create new workspaces, add users to a workspace, or assign workspace permissions to users.

Featured Content

This section lists the five pieces of content in your workspaces most recently designed as "featured." Featured content receives a higher priority than similar content in search results; for example, if 100 files contain the search criteria term sales asset, any featured files with that term will appear at the top of the search results list. To see all featured content, click **Show All**. To toggle a piece of content's feature status on or off, go to its content details page.

Top Content

This section includes lists that summarize content activity across all your workspaces. Each list sorts content according to specific criteria. Within a list, click a file icon to download content or click a title to open the associated content details page. In the Top Content section you can choose from the following categories:

- **Publication Date**—This content is sorted in descending order according to the most recent publication date. Choose the number of records you want to view from the accompanying drop-down list, or click the **Show All** button to list all the published files, and Web links.
- **Num Downloads**—This content is sorted in descending order according to the highest number of downloads. The bar graphic indicates how one record compares to another. Choose the number of records you want to view from the accompanying drop-down list, or click the **Show All** button to list all the downloaded content.
- **Rating**—This content is sorted in descending order according to the highest number of thumbs-up votes. Green and red in the bar graphic represent positive and negative votes, respectively. Choose the number of records you want to view from the accompanying drop-down list, or click the **Show All** button to list all the content with votes.
- **Num Comments**—This content is sorted in descending order according to the highest number of viewer comments. The bar graphic indicates how one record compares to another. Choose the number of records you want to view from the accompanying drop-down list, or click the **Show All** button to list all the content with associated comments.

Popular Tags

This section, commonly referred to as a "tag cloud," shows you how the content in your workspaces has been labeled. Tags are descriptive terms assigned during upload or revision that help classify and organize content. Click a tag name to view search results containing all the files and Web links with that tag. The tag names increase in size within the tag cloud according to popularity, meaning that the largest tags have been assigned to the most content. You can choose to sort the tags alphabetically or by popularity. The tag cloud contains the *30 most popular tags*.

Recent Activity

This section is a snapshot of activity within your workspaces. It shows the most recent files and Web links to receive comments, votes, or subscriptions. Featured content and newly published content are also included, but new versions of existing content, archived

content, and deleted content do not appear in the Recent Activity section. Use the **Older** and **Newer** buttons to scroll through records. The Recent Activity section   contains a maximum of 100 records.

Most Active Contributors

 This section shows the authors who have published content into your workspaces most frequently. The names increase in size according to activity, so the largest names are the authors who have contributed the most content.

My Personal Content
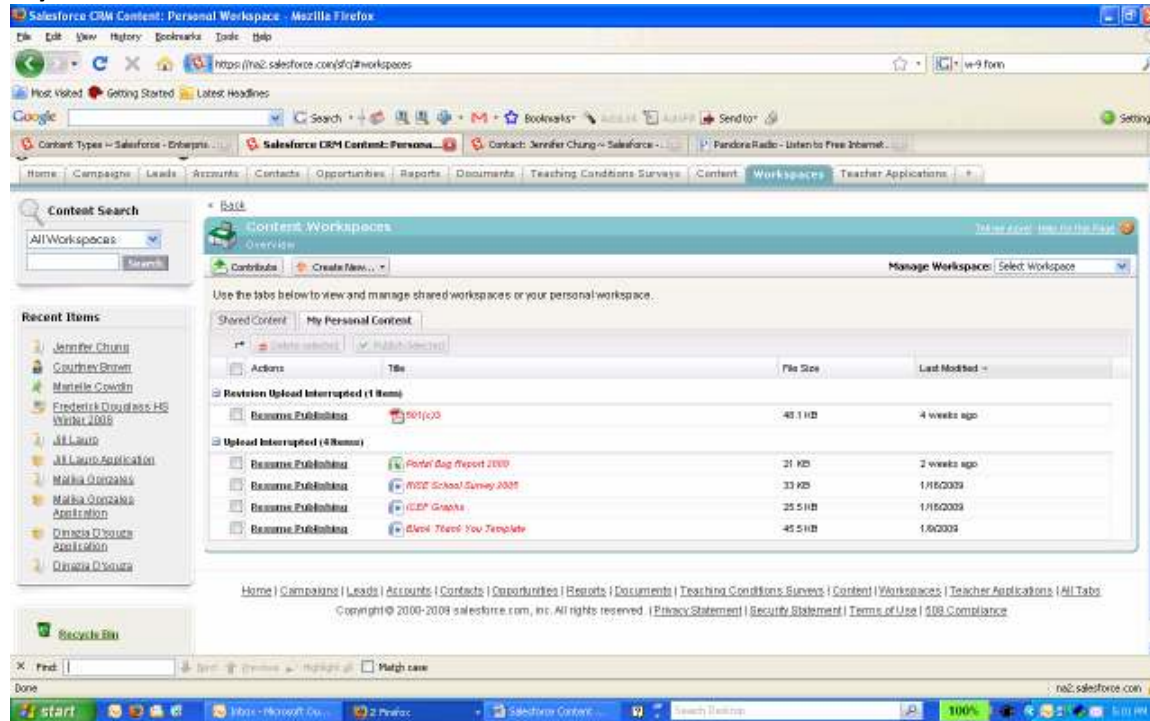
The My Personal Content tab on the workspaces home page is your private workspace. When you upload or create content and do not select a public workspace, your content is stored in your private workspace. You can publish content to a public workspace at any time or leave content in your private workspace indefinitely. Content in your private workspace can be assembled in content packs and custom presentations. It can also be sent to leads and contacts outside your organization using the content delivery feature.

The My Personal Content tab has the following sections:

Personal Workspace

If you choose the Save to my personal workspace option when publishing a file, Web   link, or content pack, your content is saved here. You can publish or delete files from   this list or click the file's name to view its content details page. The following options   that are available on the content details page for shared content are not available for   personal-workspace content: tagging, rating, subscribing, tracking downloads, tracking   subscriptions, or using custom fields. If you publish a file from the Personal Workspace list and click Cancel during the publishing process, your file is deleted.

Upload Interrupted

If an error occurs when you are uploading a new file, for example your browser crashes or your session times out, the file you were uploading is saved here. Click Publish to   publish the file to a public workspace or save it to your personal workspace. If you click Cancel on the Save or Publish Content dialog, your file will be deleted.

Revision Upload Interrupted

If an error occurs when you are uploading a new version of a file, the file you were   uploading is saved here. Users can continue to access the original version. Click Publish   to publish the file to a public workspace or save it to your personal workspace. If you   click Cancel on the Save or Publish Content dialog, your file will be deleted.

The Workspaces tab has several publishing-related options at the top of the page that let you upload, classify, and publish files, content packs and Web links in Salesforce CRM Content.

Contributing Content

To publish a file in Salesforce CRM Content:

1. Click the **Workspaces** tab.
2. To publish a new file, click **Contribute**. To publish a file that is already in your personal workspace, click the **My Personal Content** tab, locate the file, and then click **Publish**.
3. Assign a title and description to your file.
4. Choose a workspace. This becomes the managing (home) workspace, meaning that the content can be shared with another workspace but only revised by a user with author permissions in the managing workspace. If you do not want the content to be visible to other users in your organization, for example if your work is still in progress, choose **Save in my personal workspace**.
5. To publish the content on behalf of another author, choose that author from the drop-down list.
6. Tag your content. Your tagging permission depends on the [tagging rule](#) assigned to the workspace:
   - If the workspace does not have a tagging rule or if your administrator assigned the open tagging rule, you can enter tags in the Tags field. As you type a tag, Salesforce CRM Content auto suggests tags based on your My Recent Tags list and the Popular Tags section on the Workspaces tab. The My Recent Tags list on the Contribute window shows the 20 tags you have used most recently. Click a tag to add it to the Tags field automatically.
   - If your administrator assigned the guided tagging rule, you can choose from the list of suggested tags or enter a new tag. Click a suggested tag to add it to the Tags field automatically.

- If your administrator assigned the restricted tagging rule, you must choose from the list of suggested tags. When you select a tag it turns green.

7. After completing the custom fields, click **Publish** or **Save**.

*Note: To publish multiple pieces of content at once, select two or more checkboxes in the My Personal Content tab and click **Publish Selected**. All selected content displays in a tab set within the Save or Publish Content dialog. Complete the following steps for each tab in the Save or Publish Content dialog.*

Contributing Web Links to Content

To classify and publish a Web link in Salesforce CRM Content:

1. Click the Workspaces tab.
2. To add a new link, click Contribute | Do you want to link to a website instead?, then enter the URL, and click Contribute. To publish a link that is already in your personal workspace, click the My Personal Content tab, locate the link, and click Publish.
3. Assign a title and description to your Web link.
4. Choose a workspace. This becomes the managing (home) workspace, meaning that the Web link can be shared with another workspace but its content details page can only be edited by a user with relevant permissions in the managing workspace. If you do not want the link to be visible to other users in your organization, choose **Save in my personal workspace**.
5. To publish the content on behalf of another author, choose that author from the drop-down list.
6.   Tag your content.
7. After completing the custom fields, click **Publish** or **Save**.

Note: To publish multiple pieces of content at once, select two or more checkboxes in the My Personal Content tab and click Publish Selected. All selected content displays in a tab set within the Save or Publish Content dialog. Complete the following steps for each tab in the Save or Publish Content dialog.

Creating Content Packs

A *content pack* is a collection of related documents or files that are stored as a group in Salesforce CRM Content. For example, you may want to create a content pack with school collateral and send to a particular customer. Using email or instant messaging, you can distribute the content pack to colleagues or leads and contacts outside our organization. The recipient of a *content delivery* can click a single URL to open a preview player with which he or she can preview and download the content. You can then view tracking information to see how often the content pack was viewed and which documents were downloaded.
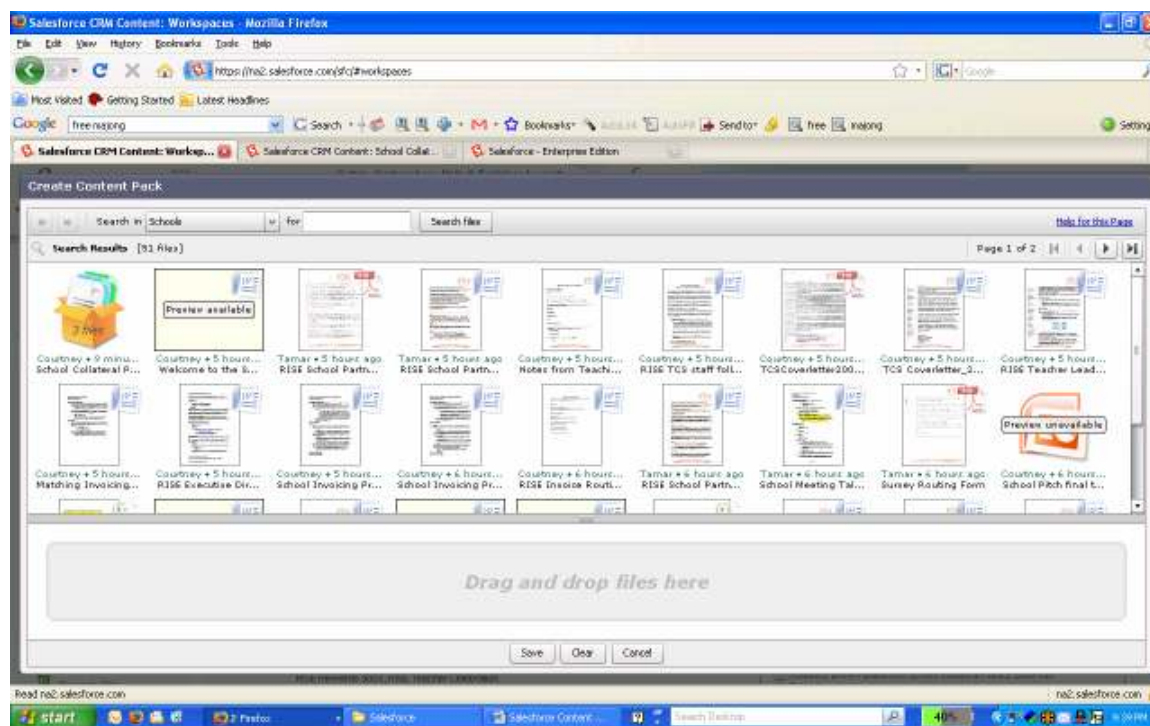
1. Depending on whether you want to create, customize, or modify a content pack, use one of the following options:

- To create a new content pack, click the **Workspaces** tab and then choose **Create New | Content Pack**.
- To create a new content pack by copying an existing pack and adding, removing, or reordering files, open the content details page for the pack and click **Clone & Customize**.
- To update a content pack and publish a new version, open the content details page for the pack and click **Edit | Modify Content Pack**.

2. Click **Search files** to display all the content in your workspaces. To refine your results, select a specific workspace to search or enter a search term in the text box.

In addition to files and documents, search results also list content packs.

3. Drag the desired content from the search results into the assembly section in the lower half of the window. The following options help you assemble your content pack:

- In the search results, click a document to preview it in the lower half of the window. Choose **Add to Content Pack** or **Hide preview** as needed.
- In the search results, hover over a document and click the folder icon (🗀) to view the content packs that use the document.
- In the search results, hover over a content pack and click the folder icon (🗀) to view all the documents in the pack.
- In the assembly section, hover over a document and click the garbage can icon (🗑) to remove that document from the pack you are assembling.
- Click **Clear** at any time to revert your changes; click **Cancel** to return to the Workspaces tab.

4. When you are done assembling or modifying your content pack, click **Save** and assign or change the content pack's name.
5. In the Save or Publish Content dialog:

- Select a workspace. If you do not want the content pack to be visible to other users in your organization, for example if your work is still in progress, choose **Save in my personal workspace**.
- Optionally, add or modify the content pack's description.
- If you are modifying the content pack, complete the Reason for Change field.
- To publish the content on behalf of another author, choose that author from the drop-down list.
- Tag your content. Your tagging permission depends on the tagging rule assigned to the workspace:
    - If the workspace does not have a tagging rule or if your administrator assigned the open tagging rule, you can enter tags in the Tags field. As you type a tag, Salesforce CRM Content autosuggests tags based on your My Recent Tags list and the Popular Tags section on the Workspaces tab. The My Recent Tags list on the Contribute window shows the 20 tags you have used most recently. Click a tag to add it to the Tags field automatically.
    - If your administrator assigned the guided tagging rule, you can choose from the list of suggested tags or enter a new tag. Click a suggested tag to add it to the Tags field automatically.
    - If your administrator assigned the restricted tagging rule, you must choose from the list of suggested tags. When you select a tag it turns green.
- Click **Publish**. You can then view the content details page, return to the Workspaces tab, or publish another file.

Take Advantage of Salesforce Content Functionality!

There is a related list titled **Related Content** on detail pages for Leads, Accounts, Contacts, Opportunities and custom objects (Teaching Conditions Surveys and Teacher Applications). The **Related Content** related list allows you to search for files, content packs and Web links and attach them to the record. When you attach a file, the latest version will be available for the *life* of the record unless the file is removed.

- Click the content's title to view the content details page where you can perform several tasks, such as commenting and voting on content, downloading files, opening Web pages and Google docs, and subscribing to content, authors, tags, or workspaces.
- Click **Del** next to a piece of content to remove it from the record. This does not delete the content from the Salesforce CRM Content workspace.
- Search for related content:

1. Click **Find Content** or **Search All**. In both cases, Salesforce CRM Content searches within the workspaces that you have access to. If you click **Search All**, the search results display all the content in your workspaces. For the Find Content search, your search results contain content that is relevant to the record; Salesforce CRM Content searches for content with text or attributes that match the following fields:
   o   On an opportunity, the Opportunity Name, Account Name, and all competitors and products.
   o   On an account, the Account Name and Industry.
   o   On a lead, the Name, Company, Industry, and Title.
   o   On the search results page, filter your results as needed by entering search terms or selecting filter criteria from the sidebar.
   o   Click **Attach** for any file that you want to attach to the record.
   o   Click the **Back** link to return to the detail page.

Note: On a custom object, clicking **Find Content** returns search results that contain the full custom object name in the document's text or attributes. If no content meets this criterion, the search results will be empty and a Search All search should be used instead.

Appendix I: How to Send a Mass Email
Step 1: From the Contacts Tab in Salesforce, scroll to the bottom of the screen and select **Mass Email Contacts**.
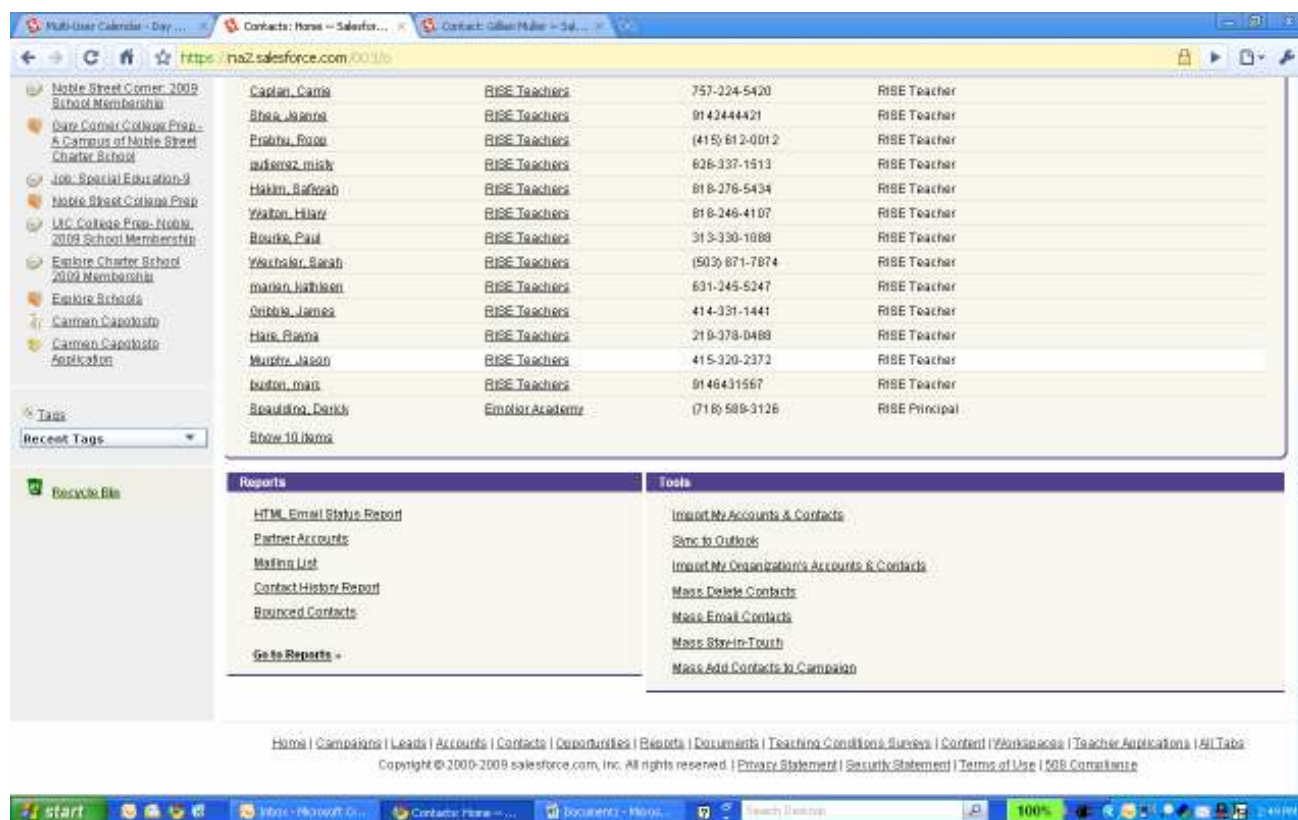
Step 2: On the next screen, select **Create a New View** (unless you have already created a view that you would like to use again, ie. Chicago Principals 2009).

- Create a View Name
- Specify Filter Criteria
  - o Make sure "All Contacts" is selected (this is always a good default to use unless you are absolutely sure that the contacts you will be emailing are ALL under your ownership)
    - ▪ You can either filter using a campaign that you have created
      - • If you choose this, search for the campaign by name.
    - ▪ You can also create a view using the filters provided on this screen.
- Select Fields to Display

- o Default is usually Name, Email and Account Name
- Restrict Visibility
  - o If you make the view visible only to you, no other team members will be able to access it. A good default is always, "**Visible to All Users**."
- Hit Save.

Step 3: You will now see a list of contacts that meet your filter criteria. If there is anyone on the list that should not receive the email, simply uncheck the box next to their name. Once you have reviewed the list, select Next.

Step 4: Select an email template. Using the drop down folder list, navigate to the email template that you would like to use and select the radio button next to it. Hit **Next**.
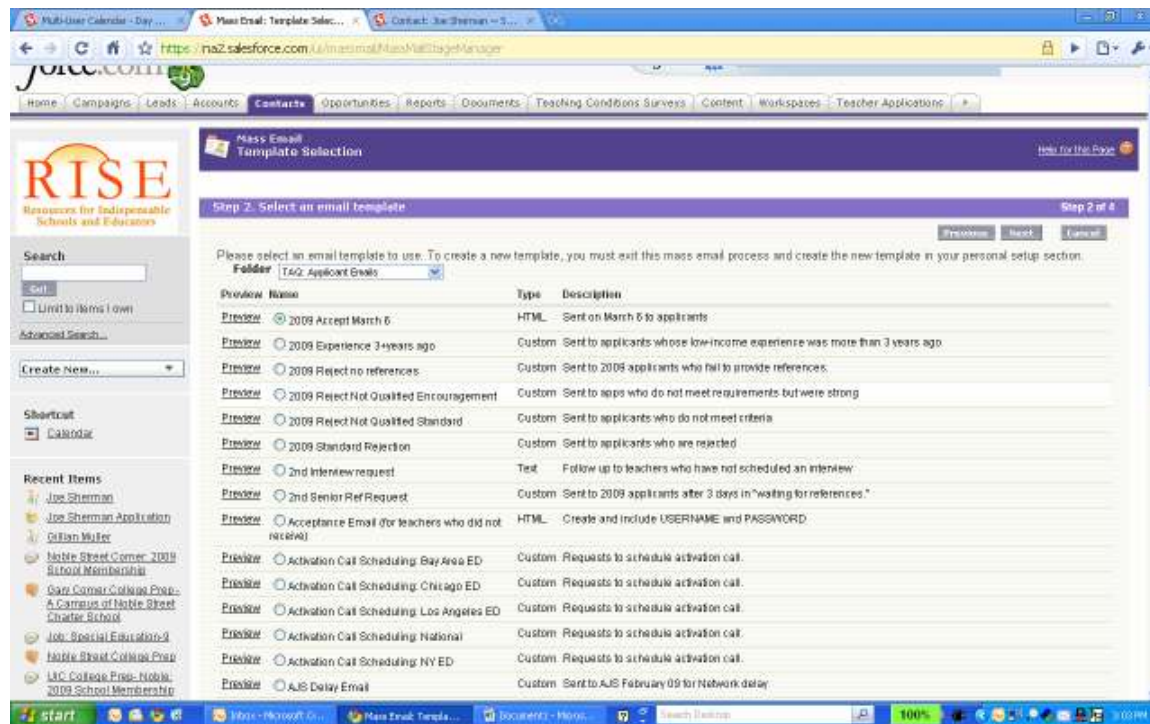
Step 5: Give the mass email a name (this is the name that you will see stored under the contacts Activity History in their record). Select a time to send the message and hit **Send**!

Appendix J: How to Send Mass Email with Campaign
How to send a mass-email and attach to a campaign
This is a four step process: Email Template → Campaign → Report → Mass Email Contacts
1. Create an Email Template for your mass email:
- Setup → Create or edit an email template → New Template
- IMPORTANT: After creating your email template send it to yourself and other RISE staff to make sure the formatting is correct. You do not want to send a poorly crafted email to 300 people.
2. Create a Campaign
- Campaign → New → Fill in all the relevant information for your Campaign (Type, Name, Start/End Date, Description)
- Make sure you check "Active"
3. Create a Report or find an existing report that captures all the contacts you wish to email.
- After it's built select "Add to Campaign" in the toolbar → select the Campaign you created
4. Create Mass Email Contacts
- Contacts → Mass Email Contacts (located at the bottom of the page) →Create New View
- In "Create New View"
  - Fill in "View Name"
  - Go to Filter by Campaign" → Select your Campaign (Note: since its already linked to a report you do not have to "Filter Any Additional Fields")
  - Select fields to display
  - Click "visible to all users"
  - Save
- Click "Next" → Select the email template you created in Step 1. → Next
- Click "BCC me on one message" only
- IMPORTANT: Stop! Unfortunately, there is no way to send out a test email. So make sure you have carefully read your email template and have captured all the relevant recipients in your report. Again, you don't want to send a flawed email to 300 people.
- Now click "Send" → CONGRATULATIONS!

Appendix K: RISE Intern Guide
WEBSITES WITH SCHOOL NAMES AND INFORMATION

- http://www.urbanassembly.org/ourschools.html
- http://www.nycchartercenter.org/schools.asp
- http://schools.nyc.gov/default.htm ("Find a School" search in middle of home page)

SALESFORCE GENERAL INFO
- Log-in
  - Username: lstein@risenetwork.org
  - Password: l28st49n
- "Search" field
- "Create New…" pull down menu

CREATING SCHOOL ACCOUNTS
- First, search for the school by entering the school name in the "Search" field on the left hand tool bar on Salesforce. We don't want duplicate accounts in Salesforce!!
  - There are 9 Urban Assembly schools currently in Salesforce.
  - There are at least 30 charter schools that are already in Salesforce.

If an account already exists….
- Click on the school name
- Account Owner: Should be "Laura Stein." If not, click on "Change". Enter "Laura Stein". Click on all check boxes *except* "Send Notification Email."
- Account Name: Edit the name if it is not spelled out completely.
- Parent Account:
  - For the Urban Assembly schools, enter "Urban Assembly, Inc."
  - For charter schools, list the "Institutional Partner" given on the Charter Center website. If none is listed, leave this field blank.
    - Click on the search icon next to "Parent Account" and search by the name of the "Institutional Partner". If the name appears in the search, click on the name and it will automatically populate the field.

- If the "Institutional Partner" listed on the website is not yet an account in Salesforce, we will have to create an account for that organization as well.
  - Google the name of the organization to get the website URL, address and phone number for the organization.
  - Open Salesforce in another window and create a new account for the Institutional Partner
    - Record Type = General
    - Account Name = "[Name of Organization]"
    - Type = "Other"
    - Phone = "[xxx-xxx-xxxx]"
    - Website = "[URL]"
    - Billing Street = "[Address of Organization]" (Copy billing address to shipping address)
    - Partner Type = "School Outreach"
  - Go back to the School Account page and type the name of the Parent Account. now that you have created an account for that organization, you will be able to save the record.
- Type: from the drop down menu…
  - For Urban Assembly, select "Small Autonomous District"
  - For charter schools, select "Charter"
- Category:
  - K-5 or K-6 = Elementary
  - 5-8 or 6-8 = Middle
  - 9-12 = High
  - 6-12 or K-8 = Combination
  - K-12 = Other
- Date Founded: the websites should list the date founded. If not, leave this field blank.
- Metro Location: "New York:"
- Neighborhood: Select the borough in which the school is located
- Part of District/Larger Organization: If there is a Parent Account, click on the checkbox.
- CMO Program Name: Type the "Parent Account" name if this field, if there is one. If not, leave it blank.
- Phone: Double-click on the field and then click on another field. The phone # format doesn't look right from the original record. This will make the format look better.
- Fax: If a fax number is listed on the website, add it to the school record. If not, don't worry about it.

- Website: If the school has its own website, put the URL here. If not, put the URL to the website available at schools.nyc.gov
- Beginning grade: This should be listed on the websites. The Urban Assembly and Charter Center websites are both more up to date that schools.nyc.gov.
- Ending grade: This should be listed on the websites. The Urban Assembly and Charter Center websites are both more up to date that schools.nyc.gov.
    - o For the beginning and ending grades, put the *actual current* grades, not the expected grades. A lot of these schools will grow to be 6-12, 6-8, etc. but only have one or two grades. Also, the data that's in the older records is often 2 years old, so these fields will have to be updated.
- # of students, breakdown, etc.: don't worry about inputting the data here.
- Billing Address:
    - o Update "Billing Street". Sometimes the capital vs. lowercase is funky.
    - o Update Billing State = "NY"
- MAKE SURE YOU HIT "SAVE" AFTER EVERY EDIT YOU MAKE TO AN OLD ACCOUNT

Exercise #1: Modify an existing Urban Assembly account

If an account does not already exist…
- Create New Account
- Account Type = "RISE School"
- Account Name = "School Name"
- Parent Account:
    - o For Urban Assembly schools, put "Urban Assembly" in this field.
    - o For new charter schools, listed at http://www.nycchartercenter.org/schools.asp, an institutional partner will be listed.
        - ▪ Click on the search icon next to "Parent Account" and search by the name of the "Institutional Partner". If the name appears in the search, click on the name and it will automatically populate the field.
        - ▪ If the "Institutional Partner" listed on the website is not yet an account in Salesforce, we will have to create an account for that organization as well.
            - • Google the name of the organization to get the website URL, address and phone number for the organization.
            - • Open Salesforce in another window and create a new account for the Institutional Partner
                - o Record Type = General

- o Account Name = "[Name of Organization]"
- o Type = "Other"
- o Phone = "[xxx-xxx-xxxx]"
- o Website = "[URL]"
- o Billing Street = "[Address of Organization]" (Copy billing address to shipping address)
- o Partner Type = "School Outreach"
  - o Go back to the School Account page and type the name of the Parent Account. now that you have created an account for that organization, you will be able to save the record.
- Type: from the drop down menu…
  - o For Urban Assembly, select "Small Autonomous District"
  - o For charter schools, select "Charter"
- Category:
  - o K-5 or K-6 = Elementary
  - o 5-8 or 6-8 = Middle
  - o 9-12 = High
  - o 6-12 or K-8 = Combination
  - o K-12 = Other
- Date Founded: the websites should list the date founded. If not, leave this field blank.
- Metro Location = New York
- Neighborhood: Select the borough in which the school is located
- Part of District/Larger Organization: If there is a Parent Account, click on the checkbox.
- CMO Program Name: Type the "Parent Account" name if this field, if there is one. If not, leave it blank.
- Phone: Phone = "[xxx-xxx-xxxx]"
- Fax: If a fax number is listed on the website, add it to the school record. If not, don't worry about it.
- Website: If the school has its own website, put the URL here. If not, put the URL to the website available at schools.nyc.gov
- Beginning grade: This should be listed on the websites. The Urban Assembly and Charter Center websites are both more up to date that schools.nyc.gov.
- Ending grade: This should be listed on the websites. The Urban Assembly and Charter Center websites are both more up to date that schools.nyc.gov.

- o For the beginning and ending grades, put the *actual current* grades, not the expected grades. A lot of these schools will grow to be 6-12, 6-8, etc. but only have one or two grades. Also, the data that's in the older records is often 2 years old, so these fields will have to be updated.
- # of students, breakdown, etc.: don't worry about inputting the data here.
- Billing Address:
  - o Update "Billing Street". Sometimes the capital vs. lowercase is funky.
  - o Update Billing State = "NY"

Exercise #2: Create a new account for Bronx Academy of Promise Charter School

ENTERING SCHOOL CONTACTS

For all of the schools you'll be working on, we will need to enter information about the Principal of the school. Some schools may have multiple school leaders (i.e. a Director of Instruction and a Director of Operations).
- Click on "New Contact" at the top of the school account page.
- Choose "RISE Principal" for the Principal, and "RISE School Contact" for all other school-based staff.
- First Name & Last Name: self-explanatory
- Title: Should be "Principal" or whatever the title is (i.e. "Co-Director)
- Email: Self-explanatory
- Description: If there is a bio on the website, copy and paste it into the "description" field.
- Click "Save"

Exercise #3: Create a new principal contact for Bronx Academy of Promise Charter School

ENTERING NEW SCHOOL MEMEBERSHIP OPPORTUNITIES
- Click on "New Opportunity" on the school account
- Opportunity Name: "School Name" 200_ Membership
- Close Date: for consistency, please use 3/31/2009 (this is the close date because we want all schools to administer the survey at least in April, if not November. It's unlikely that if a school hasn't signed up by this date that they will be able to administer the TCS)

- Start Date: 11/1/2008 (We will start accepting teacher applications in November and will start administering the survey then as well.)
- Expiration Date: 10/31/2009
- Amount: $450 (Whatever the membership fee is, in cases where you have discounted the membership fee for some reason, indicate the fee and then write a note in the notes section that explains why it was discounted…e.g. "$225 – promotional membership fee for signing up in August")
- Stage:. Prospecting
- Pitch Status: "None"
- SAVE THE OPPORTUNITY
- Contact Role * (this step is important because it will allow you to run more robust reports, trust me).   On the opportunity record, scroll down to "Contact Roles." If the principal name is not listed automatically, click on "New.
  - Search for the RISE Principal and click on their name
  - Mark as Primary
  - Role Type = School Principal

Exercise #4: Create a new contact role for Bronx Academy of Promise Charter School