

AGSES Colleague Conversation Notes

How to Make the Most of Personify	
07.28.2010	2:00 pm Eastern Time
Teleconference	
Facilitator	Camile Berry, Information Technology Director, GS Colonial Coast
Notes Of Interest	<ul style="list-style-type: none"> • Tech Conference Items are on Pearl. • The Volunteer Module will be rolling out the end of August-early September 2010 • The Fund Development Module is currently in pilot and expected to be released in January-February of 2011.
Question/Topic	What does the upcoming Volunteer Module in Personify do for you?
Comments	<p>It takes you from multiple spreadsheets throughout the council to a single entry system where the process of creating the 'customer' is the same as membership. It provides one location for information such as:</p> <ul style="list-style-type: none"> • The process of if an application has been received. • Where the application is in the process. • If they've passed background check - through Data Analyzer queries you would also be able to pull reports for when background renewals are due. • It has the ability to set multiple security settings for different levels of accessibility. • Fixes to the customer record • Has an alert code (a small "v") next to the name so no matter what department looks at the record, they'll see the customers involvement.
Question/Topic	How did you integrate all of your various systems to streamline the membership processes with Personify?
Comments	<p>With some councils, the first thing was to set the membership process up (the ability to generate batch postings everyday moves numbers).</p> <ul style="list-style-type: none"> • Important to use the correct language (i.e. customer) • Needed to sell the membership product • Volunteers see very little change
Question/Topic	What were the challenges you experienced integrating Personify?
Comments	<p>The business process is an every evolving one. When you bring multiple councils together, you bring multiple data/record keeping methods together. The biggest problems were with inconsistencies on data entry. Councils solved this by:</p> <ul style="list-style-type: none"> • Doing an in depth training for membership • Developed a "cheat sheet" so all data is entered the same • Maintained consistency in batch numbers • Keeping a "project plan" electronic document (shared by all) to know where the membership forms are in the process <p>Personify helps in this by:</p> <ul style="list-style-type: none"> • Speeding up data entry and speeding up report generation • Ability to set up batch number with a location identifier to track the paperwork.

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Question/Topic	What skill sets are necessary for Personify users?
Comments	<p>Personify requires a different skill-set from previous registrar personnel. The most important thing is to have the right person in place doing the entry into Personify. The needed skill is more than just typing, they have to know the process and be a thinker/a decision maker – they must come up with solutions not just questions.</p> <p>Councils are hiring or promoting individuals with the appropriate skill-set into a CES Manager position.</p> <p>Councils have had luck with hiring tech savvy college students over the summer to provide data entry assistance.</p>
Question/Topic	Have you had any problems with volunteers who have had direct access to membership data previously and then not having access now to Personify? This could put an extra burden on the membership director who now must pull the data for each individual request.
Comments	<p>A good fix to this issue is once the data is up-to-date, you can set up spreadsheets through Personify's "Auto Send" that can go out at regular intervals (weekly/bi-weekly, monthly, etc.) to the Membership Director.</p> <p>Utilizing Personify's Data Analyzer you go to Scheduler. From there you can pick a day of week, a time of day, email recipients, determine report format (i.e. excel), and send the report out with the appropriate note.</p> <p>Use this process to regularly generate membership reports, year-to-year comparison reports, capacity reports, etc.</p>
Question/Topic	Most everything you do that is data driven can be done through personify. You can even manage your council delegates.
Comments	<p>Personify worked in this area for Colonial Coast. Their first annual meeting they used Personify to maintain their delegate, and other meeting, data. They worked the glitches out after the first year and this last year the process worked much better. They are able to maintain a committee tab, include a date in the position code, code terms of service, etc.</p>
Conclusion	<p>We love having all of the information in one place!!</p> <p>Camile has placed query samples in the "Personify Data Analyzer" area, in the CommonWebiReports folder on Personify. To quickly locate the query samples that she referenced in the call, type "CLB-282" in the search area. Look for more samples and information on Personify and other topic in the AGSES Resource Library, www.agses.org.</p>