# cividesk-logo-tagline-xxl.png

#

# Quickstart Questionnaire

# The Media Consortium

This document is the Confidential Intellectual Property of IT Bliss, LLC and should only be shared with Cividesk customers. If you have received this document in error, please immediately notify Cividesk at info@cividesk.com and destroy any copies of this document in your possession.

## Introduction

This **questionnaire** is just the first step of the Quick-start process. It will be complemented by an **interview** to answer your questions and dig deeper in a number of areas. The information you will provide will help us create a **timeline** for the implementation and roll-out of CiviCRM in your organization. After you have reviewed and approved the timeline, we will be able to begin the implementation, with **installation, configuration and data import** tasks. You and your staff will then be **trained** on the day-to-day usage of the solution, and can then begin fully enjoying the power and convenience of a fully integrated system to run your operations.

##

## I - Project Team

Experience has shown us that it is critical to designate and empower the right team from the very beginning in order to conduct this project in the best conditions. A typical team usually consists of:

* An executive sponsor - drives the budget allocation and financial decisions surrounding this project, and has the final decision on any issues that might arise as we go along. This role is often assigned to the President or a hands-on Board Member. It should be one person (even if he/she consults others for decisions).
* Functional managers - have in-depth expertise in their respective functional areas and can allocate the time necessary to provide information, review and validate choices that will need to be made during the implementation. The same functional manager can be responsible for multiple functional areas, but no functional manager can also act as the executive sponsor.
* Champion - this is a more technical person that will receive an in-depth training on the software and act as the ‘go-to’ person for the other staff in the organization in order to resolve the most basic questions on-the-spot during the initial roll-out period.

**Please detail your project team below:**

|  |  |  |  |
| --- | --- | --- | --- |
| **Role** | **Name** | **Email** | **Phone** |
| Executive Sponsor | Jo Ellen Kaiser | joellen@themediaconsortium.com | 415-878-3862 |
| FM: Membership |  |  |  |
| FM: Events |  |  |  |
| FM: Services |  |  |  |
| FM: Communications | Manolia Charlotin | manolia@themediaconsortium.com | 347-760-4076 |
| FM: Volunteers |  |  |  |
| Champion |  |  |  |

**Please detail the list of CRM users (those who will access the CRM):**

|  |  |  |
| --- | --- | --- |
| **Name** | **Job title** | **Email** |
| Jo Ellen Kaiser | Executive Director | joellen@themediaconsortium.com |
| Manolia Charlotin | Director Special Projects | manolia@themediaconsortium.com |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

##

## II - Existing tools

This part of the questionnaire focuses on your existing information system. To answer all these questions, you might call on the person in charge of your IT.

**A) Contact Management**

**A-1) Which software/database are you currently using to manage your contacts?**Very often organizations use a mix of the above, so please indicate ALL tools you are currently using.

* *Google groups*
* *Mailchimp*
* *Excel (via quickbooks)*
* *twitter lists*

### B) Email

**B-1) Which email server are you using?**

*- Gmail*

*- Mailchimp*

**B-2) Do you host your own email server or is it hosted externally?**

external

**C) Emailing (Bulk emailing)**

**C-1) Do you currently use email marketing software for your bulk emailing?***Answer No – go to question D-1*

*yes*

**C-2) Which software are you using?**

*- MailChimp*

**D) Website**

**D-1) Do you host your website?**

*Answer Yes – go to question D-3*

*Yes*

**D-2) Which provider are you using to host your website?**

Laughing Squid

**D-3) Is your website based on a Content Management System (CMS)?**

*Answer No – go to question D-5*

*Yes*

 **D-4) Which CMS are you using?**

Please indicate the version number.

*- WordPress 4.5*

**D-5) Do you have a webmaster?**
If yes, is he/she an employee or a third party?

Not really, but we do have a guy who we call for tech support:

Thomas Beutel, modelsmith.com

**E) Membership Sign-Up/Renewal**

**E-1) Do you currently use software for online membership sign-up/renewal?**

*No*

**E-2) Which software are you using?**

**E-3) What is the current percentage of membership sign-up/renewal realized online vs manually?**

*It’s all manual*

**F) Event/Training Registration**

**F-1) Do you currently manage online event registration?**

*Yes*

**F-2) Which software are you using?**

Event Espresso – but we totally aren’t wedded to it.

**F-3) What is the current percentage of registrations realized online vs manually?**

99% online

**G) Donation**

**G-1) Do you currently manage online donation?**

*Not really. We have a donor button but no one has ever used it.*

**G-2) Which software are you using?**

**G-2) What is the current percentage of donations received online vs offline?**

**H) Payment Processor**

**H-1) Are you using an online payment processor?**

*Yes*

**H-2) Which payment processor are you using?**

Stripe, but we are willing to change to your payment processor.

If you want to use your payment processor with the CRM, please provide us with your account credentials so we can do the configuration. We need the username and the password of your payment processor account.

**H-2) Would you like to use a payment processor with the CRM?**

Yes. Very much so.

## III - Transversal areas

This part of the questionnaire can be filled out by ALL the functional managers.

### A) Contact Management

A contact is any entity you interact with. It may be an individual, a business, a government institution, a household, an organization chapter or anyone else you are collecting data for in your system. The three standard contact types are: Individual, Organization and Household.

**A-1) Approximately how many contacts do you currently have in your existing database/files?**

600

**A-2) Which custom data do you want to manage for these contacts?**

Contacts can be organized and categorized in many ways. Please include a wide list of ways you would like to categorize, search for and group your contacts. Please be creative, everything that crosses your mind is OK … really!
*ex: areas of interest, location, source of the contact, events they attended, French speaker, nationality, member of the board, role within the board, industry, potential sponsor, entity type, volunteer skills, ...*

Standard fields already included are:

For individual: Prefix, First Name, Middle Name, Last Name, Suffix, Nickname, Current Employer, Job Title, Address, State, Country, Phone, Email, Website, Preferred Language, Communication Preferences, Gender, Birth Date, Note

For Organization: Name, Legal Name, SIC Code, Email, Phone, Address, Country, Website, Note

For Household: Name, Nickname, Email, Phone, Address, Country, Note

|  |  |  |  |
| --- | --- | --- | --- |
| **Custom field label** | **Applies to an individual or household or organization** | **Type** | **Options List** |
|  |  |  |  |

### See Google Sheet with the list of options.

### B) Communications (Bulk Emailing)

**B-1) Do you want to use CiviCRM to send electronic emailings (bulk emails)?**

*Answer No – go to question B-3*

**B-2) Please fill out the table below**

|  |  |  |  |
| --- | --- | --- | --- |
| **Communication type** | **Frequency** | **# contacts** | **Comments** |
| *ex: Newsletter* | *Monthly* | *3,000* |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**B-3) Would you like to have an online subscription page to these emailings with the CRM?**

*Answer No – yes*

**B-4) Describe what information you want in the subscription page**And in particular which data you want to collect from the subscriber including standard and custom data.

*Example: Firstname, Lastname, Email, Organization*

**C) Reporting**

**C-1) What are the reports you would like to have for your organization?**

Please fill out the table below.

Please think along each of the functional areas indicated above, but also of reports that span multiple areas such as financial reports.

|  |  |  |
| --- | --- | --- |
| **Functional area** | **Report name** | **Description** |
| *ex: Membership* | *Member Renewal* | *All membership that expires in the next 60 days* |
|  |  |  |
| *Membership* | *Dues* | *Income from dues* |
| Conference | Conf Attendance | Includes both paid and unpaid registrations (speakers) |
| Conference | Conf Registrations | Income from conference registrations |
| Services | Service Users | Pulls up all users of a given service |
| Services | Service Renewal | Service contracts that expire in next 60 days |
| Services  | Service fees | Income from service fees |
| Foundations | Grant Reports | List of grant reports due in the next 60 days |
| Foundations | Grant Proposals | List of grant proposals due in the next 30 days |
| Foundations | Grants Receivable | Income from grants |
| Financial | Monthly Income | All income received in a given month |
| Individuals/Orgs | Topic Specialists | Pulls up all individuals or orgs filtered by topic specialty (ie. Environment) |
| Individuals | Type | Pulls up all individuals of a particular type (i.e. development) |
| Individuals/Orgs | Area Specialists | Pulls up all individuals or orgs filtered by geo area specialty (not same as mailing address) |
| Organizations | ByPlatform | Pulls up all organizations using a particular platform (print, etc) |
| Organizations | By web uniques | Pulls up organizations filtered by range of web uniques |
| Organizations | By Revenue Type | Pulls up organizations filtered by revenue type |
| Individuals | Collab Participants | Individuals that recently participated in a collab |
|  |  |  |

##

## IV- Functional areas

This part of the questionnaire focuses on your ‘business’ need, irrelevant of what you can achieve with the current tools you are using (which will be addressed further in the document). You should therefore reflect on your organization’s purpose, how it is organized, and the best way it could achieve its mission.

Each of the functional managers should answer questions for the functional areas they are responsible for, but are most welcome to peek and comment on the other areas as well!

###

### A) Membership

**A-1) Do you manage members?**

*Answer No – go to question B-1*

Yes

**A-2) What are the membership levels you are offering?**

Please fill out the table below and indicate all memberships in effect, even those that are not publicly advertised or implicit, such as reciprocal membership with another organization.

Please specify for each membership type if:

- membership type applies for an individual (physical person), a household or an organization (who owns the membership?)
- [membership type is good for one period (# of months) from the date of purchase (rolling) or for one calendar year (fixed)?](http://www.sfzoo.org/membershipfaq)

- do you want your membership to be auto-renewed?

- in case of a membership type on an organization, the membership type might have a limited number of representatives (please indicate the number) or an unlimited number of representatives.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Membership type** | **Individual vs Household vs Business** | **Price** | **Duration** | **Fixed or Rolling** | **AutoRenew** | **#representatives or unlimited** | **Comments** |
| *ex: Corporate* | *Business* | *$3,000* | *1 year* | *12 months* | *No* | *Max 5* | *> $10M annual revenue* |
| *Ex: General* | *Individual* | *$200* | *1 year* | *Jan 1 to Dec 31* | *No* |  |  |
| Full | Organization | Sliding Scale $250-$1000 | 1 year | Jan 1-Dec 31 | Yes | Unlimited | > $250K annual revenue |
| Associate | Organization | $75 or $150 | 1 year | Jan 1-Dec 31 | No | 2 | <$250K annual revenue |
| Reciprocal | Organization | None-discounts on services/conference | n/a | n/a | n/a | 2 |  |

**A-3) How do you want to set up membership status rules (new, current, grace, expired,...)?**

CiviCRM managed status rules based on the join date, start date and end date of the membership. These rules are customizable. CiviCRM use these rules to change automatically the status of each membership.

*New Member: from start date up to three months after they have joined
Current Member: membership older than three months
Grace Member: membership within one year of expiring
Expired Member: one day after the grace period ends*

**A-4) Would you like to have an online membership signup page in CiviCRM?**
If you have already one, please join the membership application.
If not, please describe what information you want in the page, and in particular which data you want to collect from the member including standard and custom data. Keep in mind that you can have data specific to an organization (i.e. industry, # employees,..) and data specific to individual (i.e nationality, birth of date, …)

Yes. We have an application but I’d like to change it to include this. Please note however that we don’t automatically accept applicants as members. I want an application form but not a sign up form.

|  |
| --- |
| Legal Name-Org |
| dba Name--Org |
| EIN |
| Mailing Address |
| Phone |
| URL |
| Facebook URL |
| Twitter Handle |
| Primary Contact—first name |
| Primary Contact—second name |
| Primary Contact Phone |
| Primary Contact Email |
| Organization Budget |
| # Employees |
| IRS designation |
| Do you lobby? |
| Date Founded |
| Primary Platform |
| Secondary Platform |
|

|  |
| --- |
| Website Uniques |
| Print Circulation |
| Facebook Followers |
| Twitter Followers |
| Geographic Focus |
| Topic Area |

 |

**A-5) Would you like to have a customized email sent out as membership receipt?**

*Answer No – go to question A-7*

Yes

**A-6) Please provide the text to include in the email**

Thanks for applying to the Media Consortium! You will be contacted soon by a member of our Membership Committee.

**A-7) Would you like to use automated emails for membership renewal reminders?***Answer No – go to question A-14*

**Yes**

**A-8) How many emails before the membership expiration date?**

**3**

**A-9) For each email how many days prior the expiration?**

**1 email 2 months before expiry**

**1 email 1 month before expiry**

**1 email 2 weeks before expiry**

**A-10) Please provide the text of each email including the subject**

**Will send**

**A-11) How many emails after the membership expiration date**?

3

**A-12) For each email how many days after the expiration?**

**1 email 2 weeks after expiry**

**1 email 1 month after expiry**

**1 email 2 months after expiry**

**A-13) Please provide the text of each email including the subject**

Will send

**A-14) Do you offer discount on membership? If yes, which one?**

**Sliding scale**

**A-15) Do you have any specific information about your membership management we should be aware of?**

### B) Donation/Pledges

**B-1) Do you manage donations?**

*Answer No – go to question C-1*

Yes

**B-2) Do you accept donations from individuals and/or organizations?**

Yes, both

**B-3) Would you like to have an online donation page in CiviCRM?**

*Answer No – go to question B-10*

*Yes*

If you have already one, please join an example.
If not, please describe what information you want in the page, and in particular which data you want to collect from the donor including standard and custom data.

If the custom data has several options, please enumerate the list of options.

We want to collect:

Donor First Name, Last Name, Email, Mailing Address

And answer to this question:

How did you hear about the Media Consortium?

Dropdown:

Attended Your Annual Conference

Visited Your Website

Heard a Talk/ Read an Article

Word of Mouth

Other

**B-4) Do you want to include specific levels of donation or just an open amount?**

*Answer No – go to question B-6*

**B-5) Please fill out the table below**

|  |  |  |
| --- | --- | --- |
| **Donation level** | **Amount** | **Comments** |
| Thanks! | *$10* | *Every dollar matters!* |
| Friend | $25 | Thanks! You’ve made our regular video briefings possible |
| Ally | $50 | Thanks! You’ve helped us promote our members’ content  |
| Supporter | $100 | Thanks! You’ve kept our website up and running |
| Media-Maker | $250 | Thanks! You’ve just made some media happen! |

**B-6) Do you want to offer the option of recurring donations?**

*Answer No – go to question B-8*

*Yes*

**B-7) Please specify the recurring intervals (Year/Month/Day)**

*Monthly*

**B-8) Would you like to have a customized email sent out as donation receipt?**

*Answer No – go to question B-10*

**Yes**

**B-9) Please provide with the text to include in the email**

Will do

**B-10) Do you want to manage pledges?**

*Answer No – go to question B-13*

**No**

**B-11) Do you want to include the option of pledge in the donation page?**

**B-12) Please specify the frequencies and the frequency intervals**

**B-13) Do you manage premiums (thank you gifts)?**

*Answer No – go to question B-15*

*No*

**B14) Please list the premiums you are offering with as much details as possible**
What are the rules to receive a premium?

**B-15) Do you have any specific information about your donor management we should be aware of?**

### Mainly that we don’t really have any donors yet.

### C) Sponsors

**C-1) Do you manage sponsorship?**

*Answer No – go to question D-1*

*Yes*

**C-2) Do you offer sponsorship opportunities for a particular event or do you offer annual sponsorship?**

Currently offer them for a particular event

**C-3) Do you accept sponsorship from individuals and/or organizations?**

We would do either, but to date have only had organizations sponsor

**C-4) Would you like to have an online sponsorship page in CiviCRM?**

*Answer No – go to question D-1*

*I’d like to have a sponsorship page as part of our conference page*

**C-5) Please describe what information you want in the page**
And in particular which data you want to collect from the sponsor including standard and custom data.

If the custom data has several options, please enumerate the list of options.

**C-6) What are the sponsorship levels you are offering?**

Please fill out the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| **Sponsorship level** | **Individual vs Household vs Business** | **Amount** | **Comments** |
|  | *Business* | *$3,000* |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

**C-7) Would you like to have a customized email sent out as sponsorship receipt?**

*Answer No – go to question D-1*

 **C-8) Please provide with the text and the subject of the email**

### D) Events

**D-1) Do you manage events?**

*Answer No – go to question E-1*

Yes

**D-2) Please fill out the table below with all your different event types**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Event type** | **Price set** | **Online payment** | **Payment Later?** | **Online registration** | **Frequency** |
| *ex: After-Hours Networking* | *$15 - members**$20 - nonmember*s | *Yes/No* | *Yes by check or CC on the phone* | *Yes* |  |
| Annual Conference | $100 members, $250 nonmembers | Yes | No | Yes | Once/year |
| Regional meetings | None | No | No | Yes | 3-4 times per year |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**D-3) Would you like to use online event registration?**

*Answer No – go to question D-5*

yes

**D-4) Please describe what information you want in the page**

And in particular which data you want to collect from the registrant including standard and custom data.

If the custom data has several options, please enumerate the list of options.
i.e. Dietary restrictions: vegetarian, gluten free, vegan

**Please see our event website, tmcmedia2016.org**

**D-5) Do you offer discount on event? If yes, which one?**

yes

**D-6) Do you have any specific information about your event management we should be aware of?**

### Yes—longer conversation needed.

### E) Training

**E-1) Do you manage trainings?**

*Answer No – go to question F-1*

no

**E-2) Please fill out the table below with all your different training types**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  **Training type** | **Price set** | **Online payment** | **Payment Later?** | **Online registration** | **Frequency** |
| *ex: Growing your individual donor program* | *$110* | *Yes/No* | *Yes by check or CC on the phone* | *Yes* |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

**E-3) Would you like to use online registration?**

*Answer No – go to question F-1*

**E-4) Please describe what information you want in the page**

And in particular which data you want to collect from the registrant including standard and custom data.

### F) Services

**F-1) Do you offer services to your constituents?**

i.e. consulting, trade mission, …

*yes*

**F-2) What are the service types that you are offering?**

Please fill out the table below with all your different service types.

|  |  |  |  |
| --- | --- | --- | --- |
| **Service type** | **Description** | **Online registration**  | **Service Cost** |
| *ex: J1 Visa* | *Facilitate the J1-Visa process for host companies* | *No* | *$5.000* |
| *Seat on Cision* | Share a seat on the Cision PR database | Yes | $600 |
| What Counts | Bulk buy your email from What Counts | Yes | \*complex |
| Chartbeat | Deep Discount on Chartbeat | Yes | $1500 but reg only available 2/year |
|  |  |  |  |

**F-3) For each service you would like to have online form (there is a yes in the column Online Registration)**Please describe what information you want in the form, and in particular which data you want to collect from the contact (individual, organization, household) including standard and custom data.

**G) Volunteers**

**G-1) Do you work with volunteers?**

*Answer No – go to question H-1*

*yes*

**G-2) At which occasion do you need volunteers?**

conference

**G-3) Do you need to track custom data about the volunteer?**

*Answer No – go to question G-5*

 **no –just name, email and cell**

**G-4) Please provide the list of custom fields**
If the custom data has several options, please enumerate the entire list of options.

**G-5) Do you need your volunteers to sign up to events?**

**no**

**G-6) Do you manage roles for your volunteers?**

i.e will call, usher, bar tender, etc …

no

**G-7) Would you like to have an online volunteer application page in CiviCRM?**

*Answer No – go to question H-1*

 yes

**G-8) Please provide the information you would like to include in the volunteer application**

And in particular which data you want to collect from the contact including standard and custom data.

**H) Grants**

**H-1) Do you manage grants?**

*Answer No – thank you for completing this questionnaire*

yes

**H-2) Are they grants that you receive or that you distribute?**

both

**H-3) What are the different grant types that you manage?**

We provide grants for:

Travel Grants

Reporting Grants

Collaboration Grants

**H-4) Which grant status you would like to manage?**

i.e pending, rejected, granted

pending, rejected, granted

**H-5) Do you need to track custom data about the grants?**

*Answer No – go to question H-7*

no

**H-6) Please provide the list of custom fields**
If the custom data has several options, please enumerate the entire list of options.

**H-7) Would you like to have an online grant application page?**

*Answer No – thank you for completing this questionnaire*

yes

**H-8) Please provide the information you would like to include in the application**
And in particular which data you want to collect from the contact including standard and custom data.

Grant name

Eligibility Requirements