

# People Flows

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# Why People Flows

- No one falls between the cracks
- What is 'We've done the best we can'
- Delegation
- Records and reports

# What's the alternative?

- Attendance records
- Database of newcomers
- Spreadsheet of next steps
- Staff meeting time
- High level job of follow ups

# What's the alternative?

- = admin work
- = duplicate/conflicted records
- = inconsistent follow
- = lots of staff times

# Overview: types of people flows

- Newcomer follow up
- Non-Christian follow up
- Locking In / Membership
- Leadership appointment
- Child safe
- Crisis Counselling
- MTS Apprenticeship recruitment
- Financial support development
- Other?

# Overview: Newcomer Flow

University Fellowship of Christians Search Mikey Lynch

**Steps**

You can click and drag steps within this People Flow to change the order. Drag left or right to place a step under another step.

<b>0. ENTRY Make Contact Outside Our Events</b> 1 COMPLETED Notifications are On Due 3 days later	Edit
<b>0.1 Make contact a month before semester</b> Notifications are On Due on Thursday, January 1, 1970	Edit
<b>0.2 Attend Pre-Season or MYC</b> Notifications are Off	Edit
<b>0.3 Follow-up at start of semester</b> Notifications are On Due on Thursday, January 1, 1970	Edit
<b>0.4 Follow-up contact</b> Notifications are On Due on Monday, March 14, 2016	Edit
<b>0.5 Second follow-up contact</b> Notifications are Off Due on Thursday, January 1, 1970	Edit
<b>1. ENTRY Meet and greet and contact details</b> Notifications are On Due 14 days later	Edit
<b>2. ENTRY Formal sign up, Non-Christian pathway or Re-entry</b> Notifications are On	Edit
<b>3. Ensure they are plugged into a next step</b> Notifications are Off Due 7 days later	Edit
<b>4. Join a Fellowship Group</b> Notifications are On Due 7 days later	Edit
<b>5. Attend Citywide Gathering</b> Notifications are On Due 7 days later	Edit
<b>5.1 Attend Second Citywide Gathering</b> Notifications are On Due 30 days later	Edit
<b>6. Assess their involvement</b> Notifications are On Due 49 days later	Edit

# Step by step:

## 1. Add person and assign

The screenshot shows a web application interface for managing people. A modal dialog titled "Add to People Flow" is open, allowing a user to assign a person to various categories. The background shows a person's profile page for "mikey.g.lynych@gmail.com".

**Add to People Flow Dialog:**

- Search:
- Filter: Filter
- Locking In
- New People (sample)
- Newcomers
- Non-Christian
- Student Leadership
- Close

**Person Profile (mikey.g.lynych@gmail.com):**

- First Name: Christian
- Last Name: Newcomer
- Email Address: mikey.g.lynych@gmail.com
- Phone Number:
- Mobile Number:
- Gender:
- Receive general emails:
- Receive scheduling emails:
- Receive general messages:
- Receive scheduling messages:
- Mailing Address:
- Mailing Address Line 2:
- Mailing City:
- Mailing State:
- Mailing Zip Code:
- Mailing Country: -- None --
- Home Address:
- Home Address Line 2:
- Home City:
- Home State:
- Home Zip Code:
- Home Country:

**Actions:**

- Change People Category
- Download vCard
- More
- Flows: Add
- Groups: Add
- Volunteering: Edit
- Family: Edit

**Locations:** Choose the locations this person is assigned to.

**Demographics:** Choose the demographics of this person.

# Step by step:

## 1. Add person and assign

University of...  
Add to People Flow / Newcomers

Choose which steps you would like to add this person to.

- 0. ENTRY Make Contact Outside Our Events Completed  
Assigned to:  
Unassigned  
✓ Mikey Lynch  
Second Leader  
Notes:
- 0.1 Make contact a month before semester
- 0.2 Attend Pre-Season or MYC
- 0.3 Follow-up at start of semester
- 0.4 Follow-up contact
- 0.5 Second follow-up contact



# Step by step:

## 1. Add person from form

### Starting Uni in 2016?

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We'd love to get in touch with you and help your transition to uni be a smooth one. Even if you are planning on going to another uni, we'd love to put you in touch with the AFES group there!

Your privacy is important to us. Your information will be kept secure and used only for the purposes of the ministry of the University Fellowship of Christians Society and the Australian Fellowship of Evangelical Students. For our privacy policy, contact [info@ufcutas.org](mailto:info@ufcutas.org)

First Name

Last Name

Email Address

Mobile Number

# Step by step:

## 2. Notification and assigning

The screenshot shows a Gmail interface. At the top is the Google search bar. Below it is the Gmail navigation bar with icons for back, forward, trash, and other actions. The main content area displays an email from 'University Fellowship of Christians' with the subject '[University Fellowship of Christians] Christian Newcomer has been added to the Newcomers people flow'. The email body contains the following text: 'Hi Mikey, Christian Newcomer has been assigned to the 0. ENTRY Make Contact Outside Our Events step in the Newcomers people flow and is waiting for someone to accept them. The due date for this person is Friday, November 6, 2015. You can log in to view this People Flow to view and accept them at [https://ufcutas.elvanto.com.au/admin/people/flow\\_step\\_person/?id=5f3f3590-8279-11e5-aba7-06fb5fa8f77d](https://ufcutas.elvanto.com.au/admin/people/flow_step_person/?id=5f3f3590-8279-11e5-aba7-06fb5fa8f77d)'. At the bottom of the email, there is a 'Click here to Reply or Forward' link. The footer of the page shows account information: '9.19 GB (61%) of 15 GB used', 'Terms - Privacy', and 'Last account activity: 24 minutes ago Details'.

Google

Gmail

COMPOSE

Inbox

Starred

Important

Sent Mail

Drafts (67)

Deleted Items (566)

Sent Items

More

Sign in to start talking to friends

Sign in

Signing in will sign you in to Hangouts across Google

Learn more

Revert to the old chat

[University Fellowship of Christians] Christian Newcomer has been added to the Newcomers people flow

University Fellowship of Christians <info@ufcutas.org>

to Mikey

09:23 (0 minutes ago)

Hi Mikey,

Christian Newcomer has been assigned to the **0. ENTRY Make Contact Outside Our Events** step in the **Newcomers** people flow and is waiting for someone to accept them.

The due date for this person is Friday, November 6, 2015.

You can log in to view this People Flow to view and accept them at [https://ufcutas.elvanto.com.au/admin/people/flow\\_step\\_person/?id=5f3f3590-8279-11e5-aba7-06fb5fa8f77d](https://ufcutas.elvanto.com.au/admin/people/flow_step_person/?id=5f3f3590-8279-11e5-aba7-06fb5fa8f77d)

Click here to [Reply](#) or [Forward](#)

9.19 GB (61%) of 15 GB used

Manage

Terms - Privacy

Last account activity: 24 minutes ago

Details

# Step by step:

## 2. Notification and assigning

The screenshot shows a web application interface for the 'University Fellowship of Christians'. A modal dialog box titled 'Assign Person' is open, displaying a dropdown menu with 'Mikey Lynch' selected and 'Second Leader' listed below it. The dialog has 'Cancel' and 'Assign Person' buttons. In the background, a message states: 'This person has not been assigned! You can accept this person or assign them to someone else.' Below this, a section titled '0. ENTRY Make Contact Outside Our Events Instructions' contains a list of steps: 1. Write a note saying how they were contacted. 2. Put contact details into CCB and SMSGlobal. 3. Mark As Done. 3.1 This will automatically add them to queues 0.3 'Follow up contact'. 3.2 IF they are contacted outside of Semester add them to 0.2 'Follow up at start of Semester'. 3.3 If they are contacted more than one month before Semester begins add them to 0.1 'Make contact'.

# Step by step:

## 3. Status, notes and instructions

The screenshot shows a CRM interface for a 'Fellowship of Christians'. A 'Change Status' modal is open, displaying a dropdown menu with the following options: 'Not Started' (selected with a checkmark), 'Pending', 'In Progress', and 'Complete'. The background interface shows a person's profile with a 'Flow Status' section. The status is currently 'Not Started' in red text, with a 'Change' link below it. Other fields include 'Due Date' (Friday, November 6, 2015), 'Assigned To' (Unassigned), and 'Contact Number' (None). A green button 'Mark this Person as Completed' is visible in the top right. At the bottom, there is a 'Notes' section with a 'Write Note' button and a dropdown for 'All Notes'. The text 'No notes found' is displayed below the notes section.

Change Status

- ✓ Not Started
- Pending
- In Progress
- Complete

Flow Status

Status: **Not Started**  
[Change](#)

Due Date: Friday, November 6, 2015  
[Change](#)

Assigned To: Unassigned  
[Accept this person](#) • [Re-assign person](#)

Contact Number: None

Gender: None

Locations: None

Demographics: None

Address: None

Notes

[Write Note](#) [All Notes](#)

No notes found

# Step by step:

## 3. Status, notes and instructions

Notes

✎ Write Note All Notes ▾

Note

Type

Action ▾

Categories

Categories ▾

Private

This is a private note

Schedule

Schedule this note

# Step by step:

## 3. Status, notes and instructions

### 0. ENTRY Make Contact Outside Our Events Instructions

1. Write a note saying how they were contacted.
2. Put contact details into CCB and SMSGlobal
3. Mark As Done.
  - 3.1 This will automatically add them to queues 0.3 'Follow up contact'.
  - 3.2 IF they are contacted outside of Semester add them to 0.2 'Follow up at start of Semester'
  - 3.3 If they are contacted more than one month before Semester begins add them to 0.1 ' Make contact before Semester' and
  - 3.4 This will automatically send them an email greeting them and giving them information - the Mail Merge 'About the Uni Fellowship of Christians'.  
If for some reason you would rather send them a personalised and customised email, uncheck this box and write your own.

# Step by step:

## 4. Automatic next steps

Please enter some notes about this person

### Actions

The following actions will occur when you complete this person. Some are automatic and some will require you to set manually. Please read carefully before completing this person.

Automatically add to group **Current Students**.

Send **QUEUE: About the Uni Fellowship of Christians and Pre-Season Conference** as an email.

Move person to **0.1 Make contact a month before semester** step. Assign to Me

Move person to **0.3 Follow-up at start of semester** step. Assign to Me

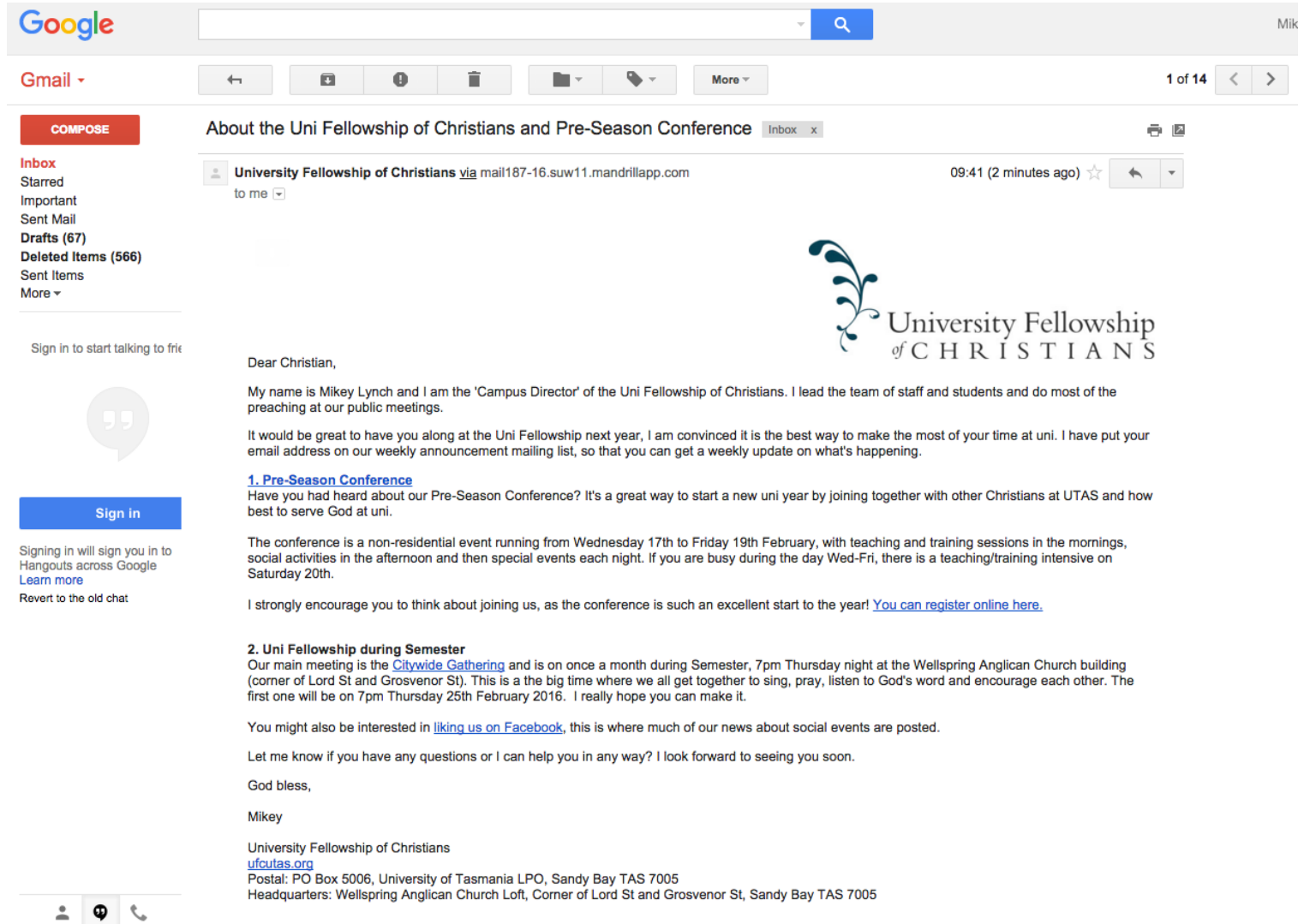
Move person to **0.2 Attend Pre-Season or MYC** step. Assign to Me

Move person to **0.4 Follow-up contact** step. Assign to Me

Cancel Complete Person

# Step by step:

## 4. Automatic next steps



The screenshot shows a Gmail interface. At the top is the Google search bar and the Gmail logo. Below that is a navigation bar with icons for back, forward, trash, and other actions. The main content area displays an email from the University Fellowship of Christians. The email subject is "About the Uni Fellowship of Christians and Pre-Season Conference". The sender is "University Fellowship of Christians via mail187-16.suw11.mandrillapp.com" and the time is "09:41 (2 minutes ago)". The email body contains a message from Mikey Lynch, the 'Campus Director', welcoming the recipient and providing information about the Pre-Season Conference and the Uni Fellowship during the semester. The email also includes links to register online and a Facebook page. At the bottom of the email, contact information for the University Fellowship of Christians is provided, including the website [ufutas.org](http://ufutas.org), postal address, and headquarters location.

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Deleted Items (566)

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Sign in

Signing in will sign you in to Hangouts across Google

Learn more

Revert to the old chat

About the Uni Fellowship of Christians and Pre-Season Conference

University Fellowship of Christians via mail187-16.suw11.mandrillapp.com

to me

09:41 (2 minutes ago)

Dear Christian,

My name is Mikey Lynch and I am the 'Campus Director' of the Uni Fellowship of Christians. I lead the team of staff and students and do most of the preaching at our public meetings.

It would be great to have you along at the Uni Fellowship next year, I am convinced it is the best way to make the most of your time at uni. I have put your email address on our weekly announcement mailing list, so that you can get a weekly update on what's happening.

**1. Pre-Season Conference**

Have you had heard about our Pre-Season Conference? It's a great way to start a new uni year by joining together with other Christians at UTAS and how best to serve God at uni.

The conference is a non-residential event running from Wednesday 17th to Friday 19th February, with teaching and training sessions in the mornings, social activities in the afternoon and then special events each night. If you are busy during the day Wed-Fri, there is a teaching/training intensive on Saturday 20th.

I strongly encourage you to think about joining us, as the conference is such an excellent start to the year! [You can register online here.](#)

**2. Uni Fellowship during Semester**

Our main meeting is the [Citywide Gathering](#) and is on once a month during Semester, 7pm Thursday night at the Wellspring Anglican Church building (corner of Lord St and Grosvenor St). This is a the big time where we all get together to sing, pray, listen to God's word and encourage each other. The first one will be on 7pm Thursday 25th February 2016. I really hope you can make it.

You might also be interested in [liking us on Facebook](#), this is where much of our news about social events are posted.

Let me know if you have any questions or I can help you in any way? I look forward to seeing you soon.

God bless,

Mikey

University Fellowship of Christians  
[ufutas.org](http://ufutas.org)  
Postal: PO Box 5006, University of Tasmania LPO, Sandy Bay TAS 7005  
Headquarters: Wellspring Anglican Church Loft, Corner of Lord St and Grosvenor St, Sandy Bay TAS 7005



# Reports

	2014	2015
0. Make contact outside our events	30	30
1. Meet, greet and contact details	30	49
4. Attend a Fellowship Group	15	19
5. Attend Citywide Gathering	14	24
5.1 Attend Second Citywide Gathering	14	18

# Designing

- Do the thinking on paper first
- Simple as possible, as complex as needed
- Think record keeping not just doing
- Separate Flows or one big Flow?
- Add ENTRY points
- Mark Emails as QUEUE
- Avoid dead-ends
- Re-loops are useful

# Designing Continued

- Optional vs compulsory automations
- Changing your system will muck with your stats
- Task manager and outcome reporter (eg ATTEND vs INVITED)
- Detailed instructions in each step

# Managing

- System for re-checking and updating emails
- Key leaders manage the software and delegate to others who might not use the software
- Needs training and refreshers: inevitably confusing
- Set aside time in the week to do it: it's ministry time not admin time

# Questions