

Technology & Communications Webinar
December 10th, 2020



Technology Roadmap 2021

About Us

Jason Johnson, Director IT



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About this Webinar

- Monthly (2nd Tuesday)
- Audience driven
- Timely
- Open to anyone
- Recorded



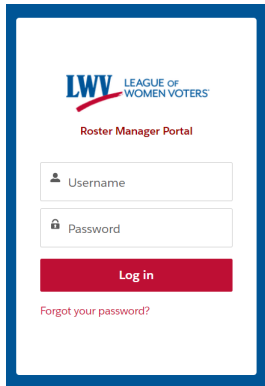
Guiding Principles

- Enter data once, use it everywhere
- Share whenever possible
- Iterative change



2020 Technology Overview

Automated Data Exchange



Roster Manager Portal 3.X

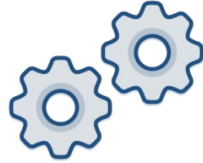
Roster managers and members access league information.

- Roster Management
- League Leadership Updates
- Member Self-Updates

Web Sites

Drupal sites pull individual league information from Salesforce.

- Contact
- Web site



Manual Data Exchange



Constituent Relationship Management

NGO Connect will support the core constituent management functionality at LWVUS.

- Constituent Management
- Gift Entry
- Mailings
- Reporting
- Annual Fund
- Prospect Management
- PMP Count



SALSA - Online Functionality

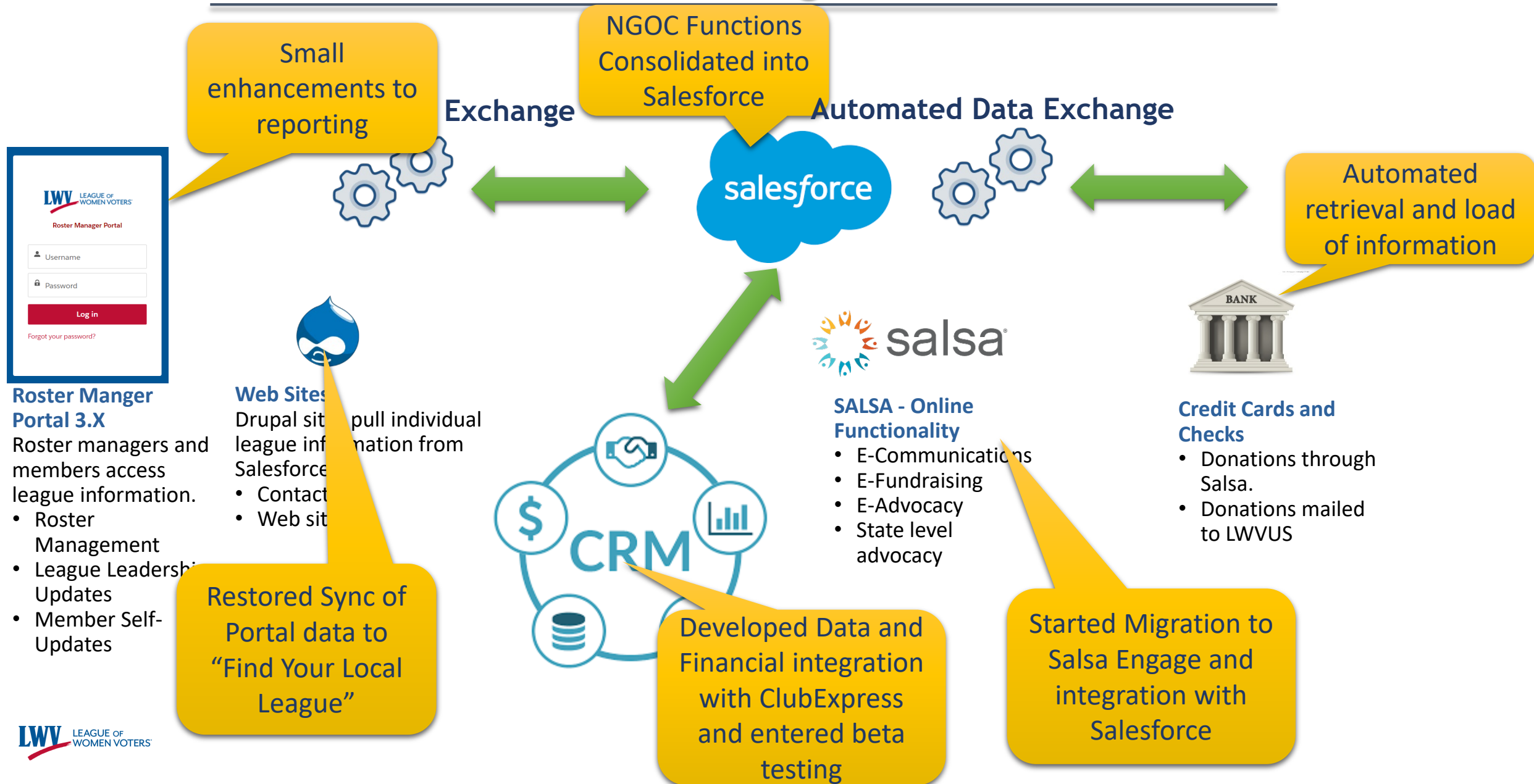
- E-Communications
- E-Fundraising
- E-Advocacy
- State level advocacy



Credit Cards and Checks

- Donations through Salsa.
- Donations mailed to LWVUS

2020 Progress



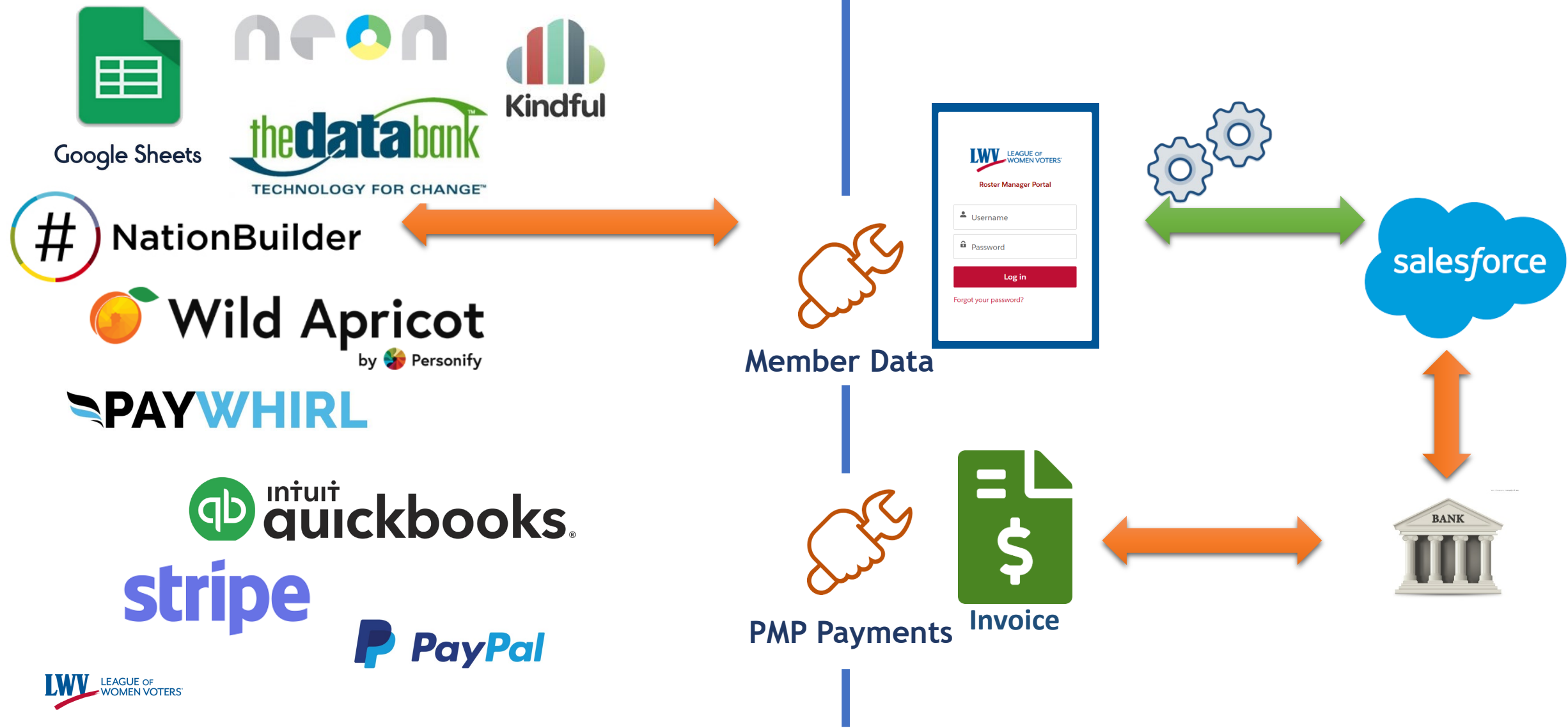
2020 Progress

- **Roster Manager Portal: Version 3**
 - Improved reporting and added charts and graphs.
 - Multiple bug fixes
- **CRM Vendor Integration**
 - Created a partnership with ClubExpress
 - Built out and beta tested data integration. Pilot will start before the end of the year with assistance from Colorado Leagues
 - Financial integration currently in beta testing
 - Drafted v2 of data integration standards which will be the basis of CSV loads from any system
- **Find Your Local League**
 - Fixed the long-broken sync between the roster manager portal and the LWWUS “Find Your Local League” portion of the website

All Leagues Technology Overview 2020

State and Local Leagues

National Office



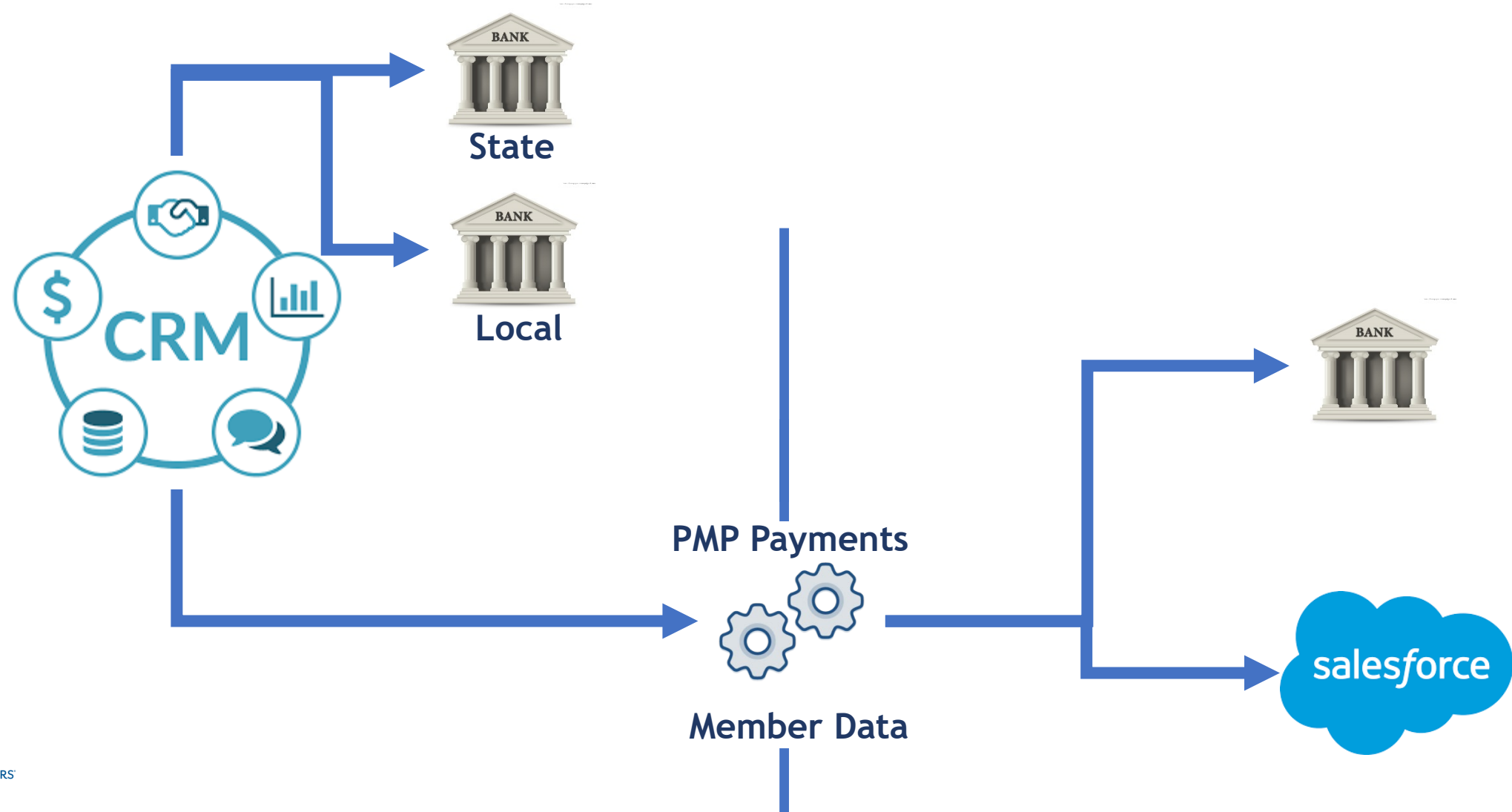
LWV Technology Maturity Model

- **Level 1:**
 - Collect member dues in cash or checks and manually update using the Roster Manager Portal on a monthly basis.
- **Level 2:**
 - Maintain a separate member database (AMS, CRM, etc) which can export data to a spreadsheet for upload to the national database.
- **Level 3:**
 - Use a partner CRM system which syncs every night with the national system and exchanges agreed upon data.
- **Level 4:**
 - Use a partner CRM system which automatically sends member data to the National office and distributes payments to local/state/national at the point of purchase.

Level 4

State and Local Leagues

National Office



Level 2

State and Local Leagues



National Office



Invoice



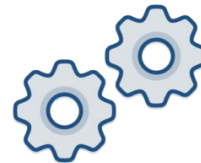
PMP Payments



Any system
with CSV
Export



Member Data

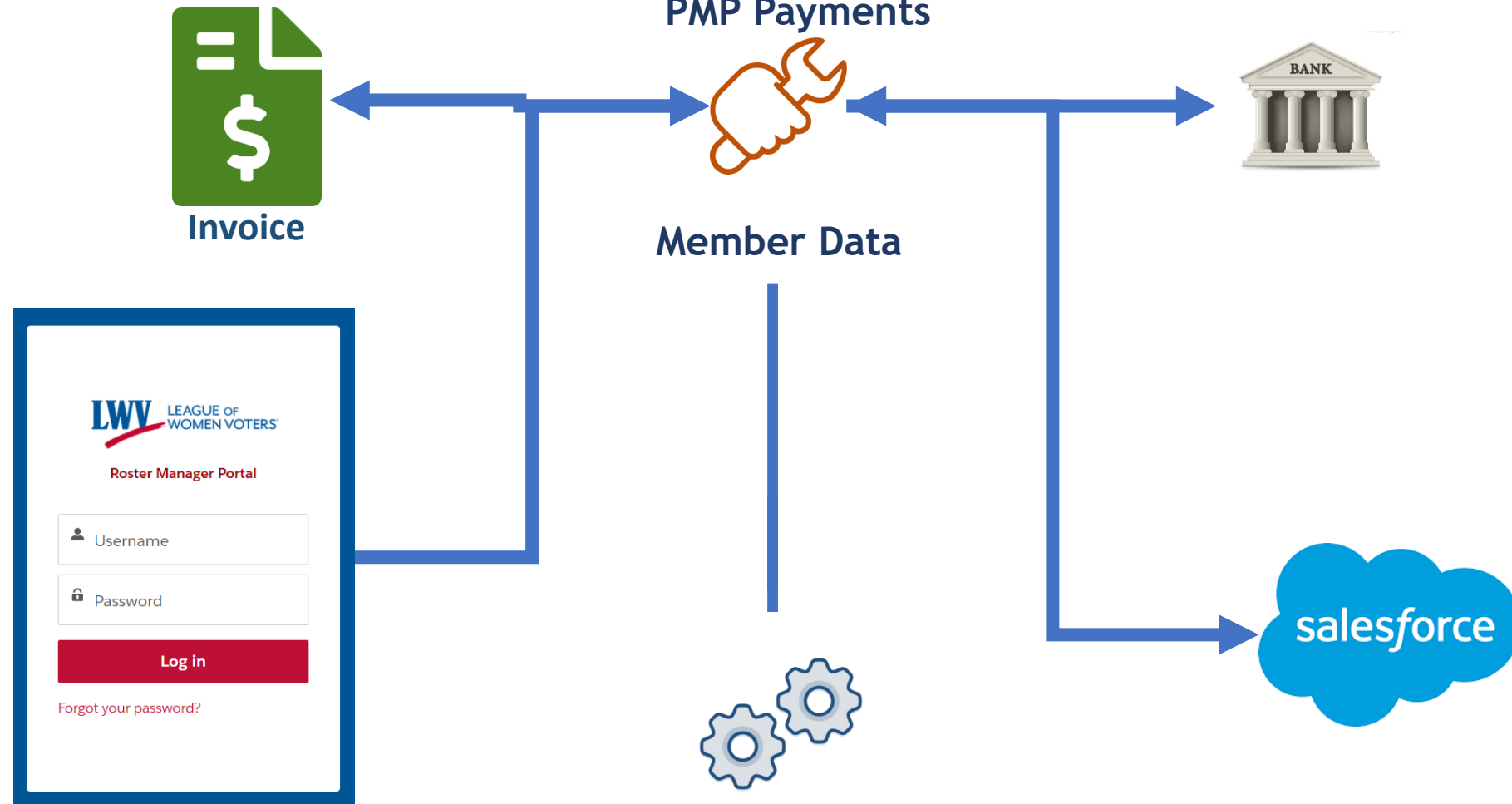


salesforce

Level 1

State and Local Leagues

National Office



2021 Roadmap

- **Data Clean-up**
 - Fix member IDs
 - Clean up non-standard portal data
- **Level 1: Roster Manger Portal**
 - Change contact email address for “Find a League”
 - Add requested fields
- **Level 2: Develop and pilot CSV loader**
 - Pilot a csv loader
- **Level 4: Data and Payments Connector with CRM**
 - Implement data and payments connector for all ClubExpress Customers

We Want to Hear from You

Please respond to the post webinar survey

We want your thoughts on the 2020 presentations
so we can make 2021 even better!



