Systems and Processes at Project Onward

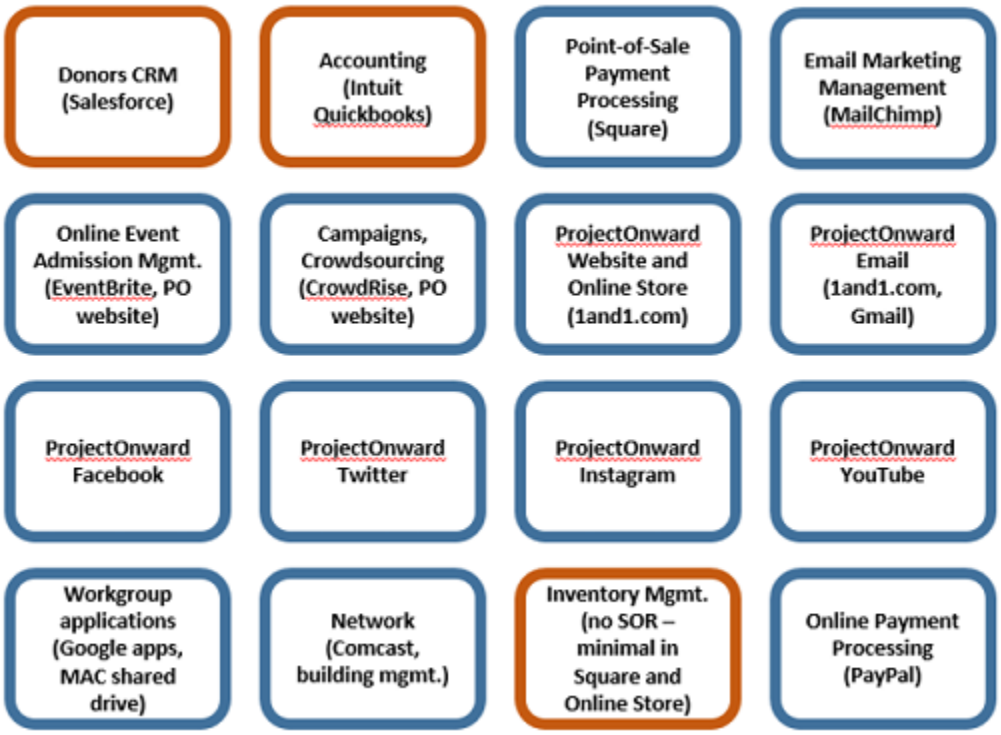
Or

How to Bore my Kid Enough to Go to Sleep

CONTENTS

1 PROJECT ONWARD SYSTEMS

1.1 CURRENT STATE



Project Onward uses a number of systems and applications (pictured above). The systems and applications pictured in **blue** have varying degrees of importance to day-to-day operations.

1.1.1 Multiple systems and data corruption

Businesses and organizations often end up with multiple systems, databases and/or, spreadsheets, holding the same information. Often times, different groups of people use the alternative systems, and data continues to get more out-of-sync. Many times, information is copied from one system to another, and then updated differently in each system. When this happens, the data becomes more and more ambiguous or untrustworthy due to variances in matching records in different systems.

1.1.1.1 DISCUSSION – Clean Data

Salesforce record: Charlie Barnes – 234 Main Street, Chicago, IL, 60655 - donor – charlie@gmail.com - billionaire – loves Project Onward

MailChimp: Charles E. Barns – 60615 – charlie@gmail.com - requested no contact

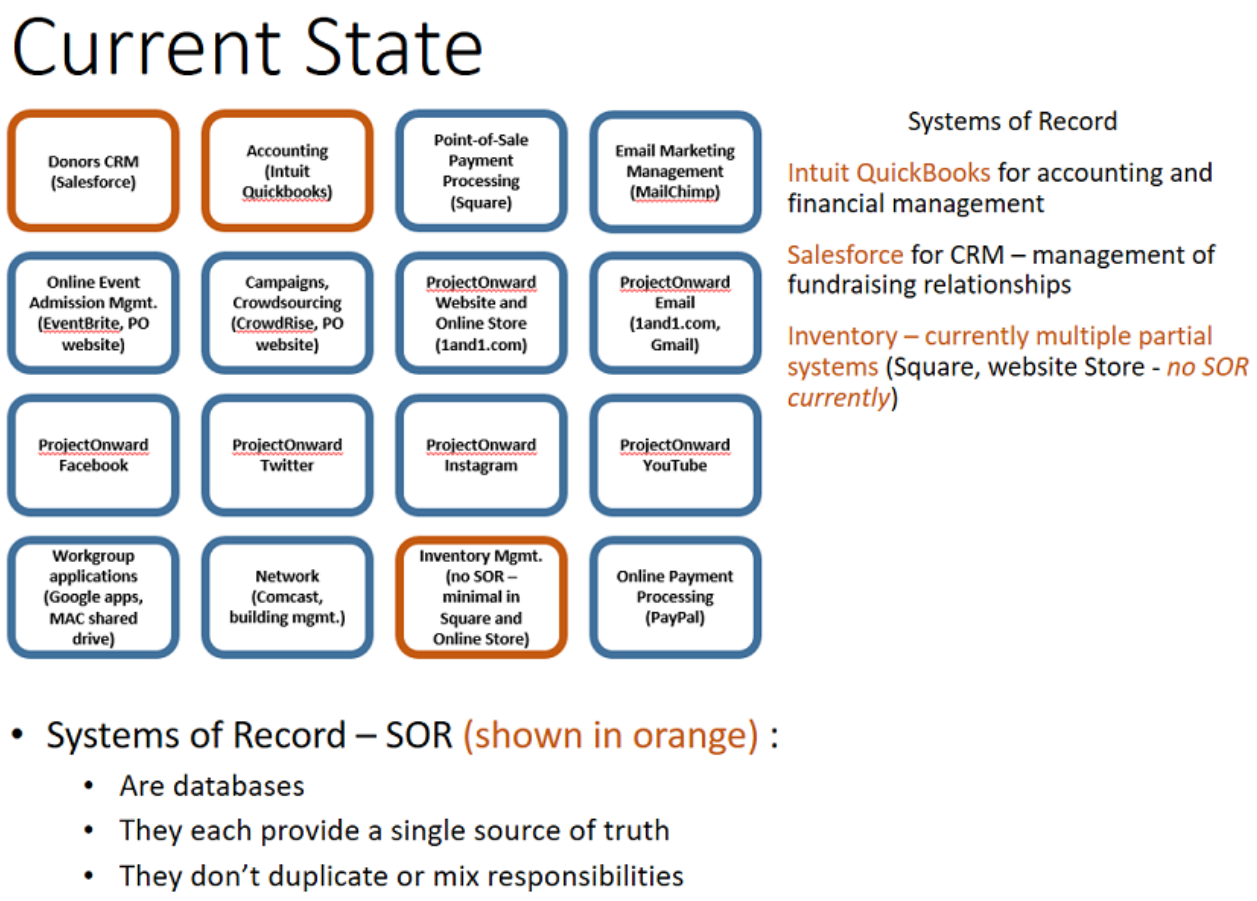
Is this the same person?

He has the same email address.

Which information is accurate?

Should we contact him, or not?

1.1.2 Systems of Record (SOR)



SOR's (pictured above, in **orange**) are important to the smooth functioning of Project Onward record keeping.

A system of record (SOR) is a database or master file that holds the single record of truth for the data that it maintains.

1.2 System of Record (SOR)

In any organization, discipline around defined Systems of Record (SOR's) is essential for the working together of the various systems.

1.2.1 Attributes of an SOR

The above example underscores the need for one system to be the System of Record (SOR).

> If copies of information end up in other systems, the SOR is always considered to hold the accurate information
>
> If the information needs to exist in other systems, information from the SOR will always overlay information in other systems.
>
> And this underscores the importance of maintaining information updates in the SOR. Always make updates in the SOR, then copy any needed information to another system.

1.2.2 Project Onward currently has two SOR's:

Accounting – Intuit QuickBooks

QuickBooks is the accounting system currently used by Project Onward for management of finances. Being an SOR for Project Onward, the QuickBooks records are considered the records of truth for financial transactions, and are called upon for financial audits, tax reporting and any other budgetary or financial situations required.

Because QuickBooks is not used by general staff and volunteers, it is not covered in this training.

Donors / **fundraising** – Salesforce

Salesforce is the CRM (Constituent Relationship Management) system currently used by Project Onward for fundraising and donor relationship management. Salesforce is considered as the SOR for this, and holds information on all donors and prospects, as well as financial transactional history needed for sustainability and fundraising activities.

Salesforce is used by staff and volunteers for fundraising and donor management, and is included as a part of this training.

1.2.3 Inventory Management - a future SOR?

Inventory Management – *(currently no current SOR)*

Project Onward currently has information related to inventory management in multiple systems such as the website store, the point-of-purchase system (Square) and productivity applications such as Google Drive.

No complete inventory management system has been defined yet.

1.2.4 DISCUSSION – Square as SOR for Inventory Management?

Scenario: Someone buys a painting on a Third Friday. That painting happens to be in the Online Store on the website, and someone buys the same painting.

How do we avoid this?

What would an SOR look like?

1.2.5 Impacts of SOR on processes

Like most organizations, Project Onward has to maintain duplicate sets of information in multiple systems. Without good process, this can lead to inaccurate information.

1.2.5.1 DISCUSSION – What is the Truth?

At Project Onward, email addresses are kept in multiple systems.

Paypal (payment system)

Square (point-of-purchase system)

MailChimp (email mailing list)

Salesforce (fundraising / donor management)

Crowdrise (online campaign management)

EventBrite (online event management)

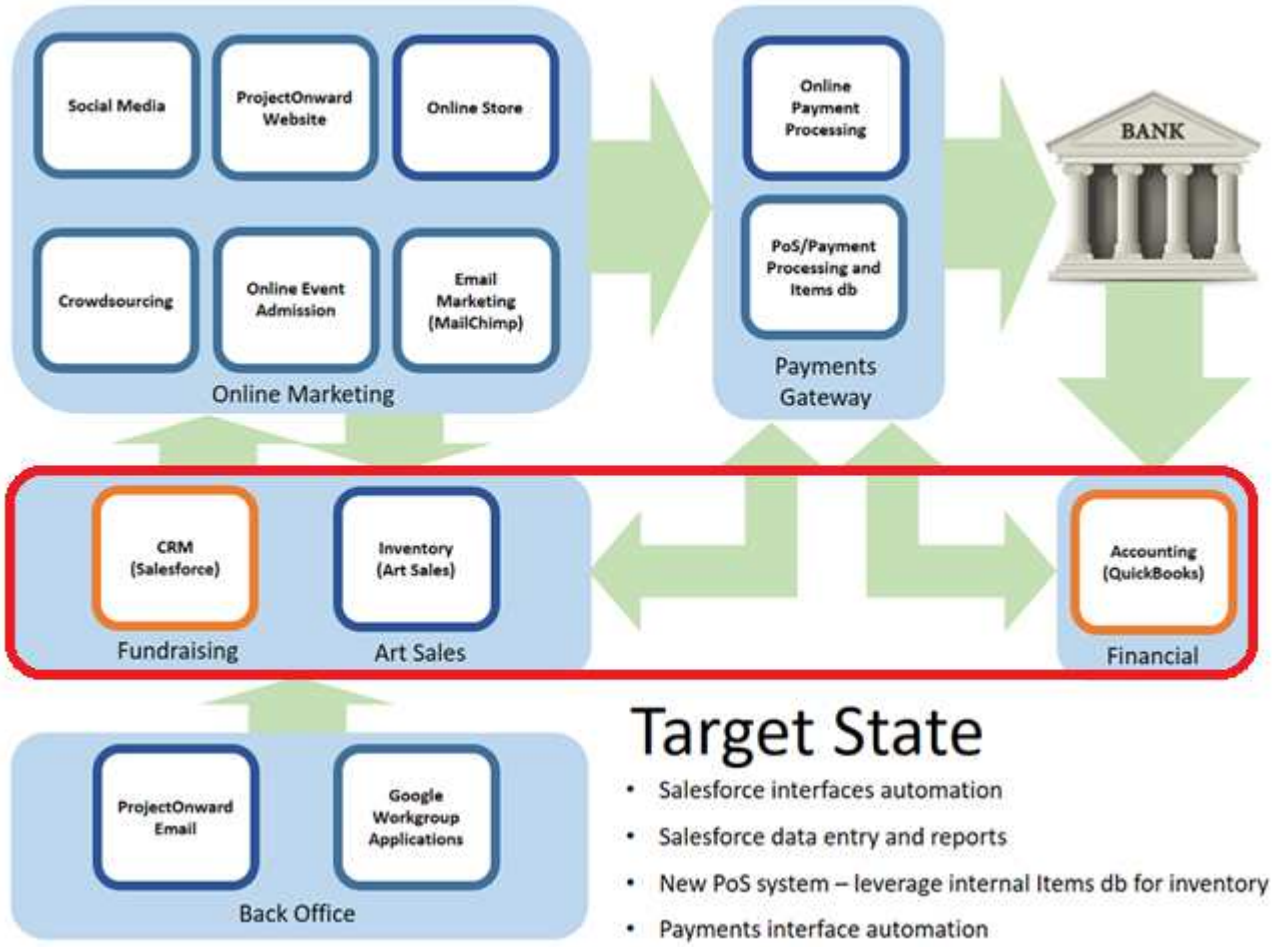
Multiple spreadsheets

When attendees of a Third-Friday event fill out visitor interest cards, with updated email addresses, where should we enter this information?

What SOR should be considered?

What if we need email addresses in more than one system?

1.3 TARGET STATE



In any organization, systems and applications are always changing. *When growth is unmanaged, complexity and cost increase.* **Systems Architecture is a discipline that works to move systems growth and changes along a line that minimizes complexity and cost, and maximizes functionality.** This vision for the future is represented by the Target State (pictured above). Note that the SOR's (**in red circle**) are central to the processing of the various systems.

1.3.1 Interfaces

The **green arrows** (pictured above) represent interfaces between functional groups of systems and applications. Interfaces are places where information from one system is either used by, or handed off to another. Characteristics of interfaces:

- They may be manual, batch (i.e. manually update a group of records at once), or fully automated
- The goal is to update information in SOR systems (**in red circle** in the picture above)
- When other systems or applications need information from SOR's, they reference it directly

- If a non-SOR copies data, the data is seen to be *temporary* in the other system, and can always be refreshed from the SOR
- Work has been going on to move interfaces to a higher degree of automation.

1.3.2 DISCUSSION – Avoiding IT chaos

How well does our current Information Technology (IT) environment support our daily needs at Project Onward?

What is working well?

How could we improve?

What would a “roadmap to the future” look like?