



Connection Campaigns

Version 1.3



Connection Campaigns

Overview

The goal of this plug-in is to provide a simple way to create connection campaigns that allow for the contacting of many individuals. It links several of Rock's most-loved features to work together to achieve this.

While this is being initially deployed as a plug-in, the feature will eventually be moved into the core product. This pattern was chosen to more quickly meet the immediate needs of churches responding to the COVID-19 pandemic.

Connection campaigns have been designed to work as a one-time connection or a reoccurring connection. As you read through the rest of this configuration guide, keep that in mind.

Version Change Log

Version 1.1 (3/30/2020)

1. Bug fixes and performance improvements.

Version 1.2 (4/1/2020)

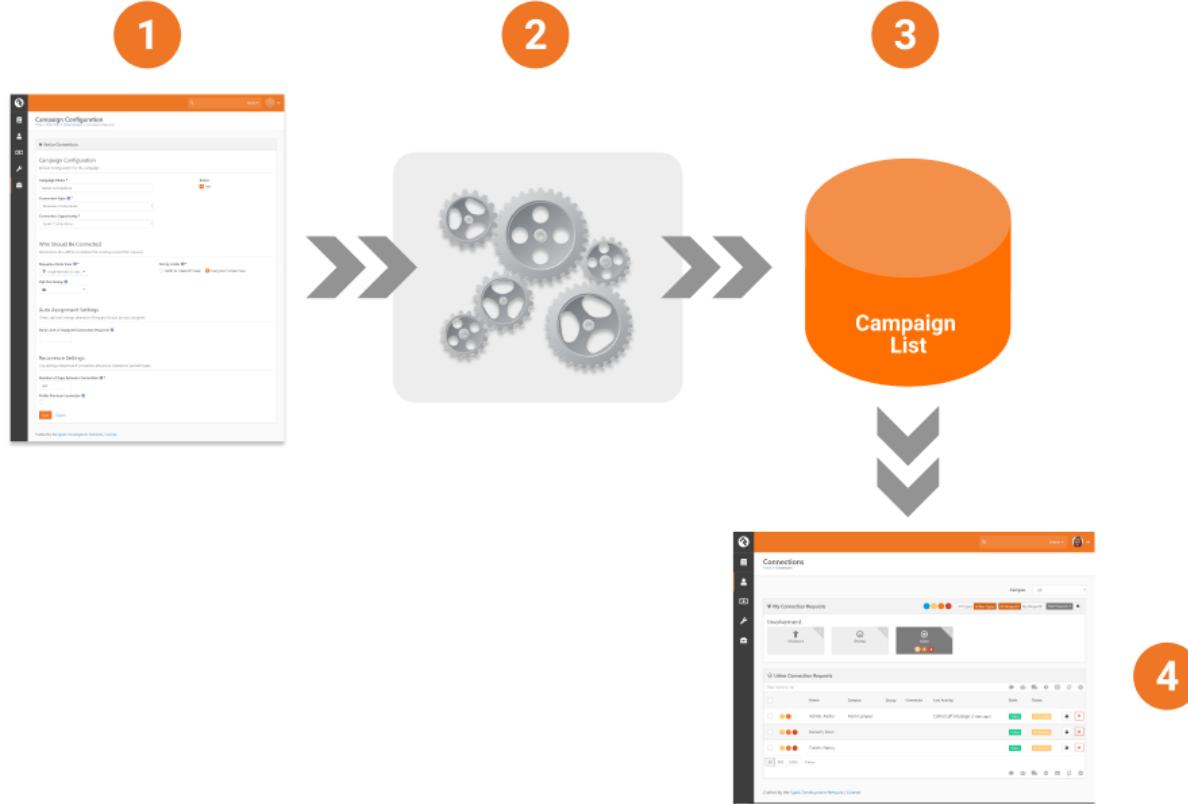
1. Addresses issues related to single campus configurations.
2. Fixed bug related to connector groups with no campus.
3. Refined the logic when campaign set to create connection requests "As Needed", a value of 0 or blank in the "Daily Limit of Assigned Connection Requests" field will have the effect of not creating any request automatically. Requests will need to be created by connectors using the "+ Campaign Requests" button.

Version 1.3 (4/21/2020)

1. Added a way to create customized Connection Request "Comments" using an advanced Lava template on the campaign configuration.

Solution

Before diving into the details, let's take a high-level tour of how a campaign works. The diagram below shows the flow of a campaign.



- Campaign Settings:** We start by configuring our campaign. This includes defining:
 - The connection opportunity to link to
 - Who should be contacted by the campaign (think data view)
 - How to assign connectors
 - Should people be contacted on a continued basis
- Campaign Job:** A job has been configured to process the configuration above and create a list of people who should be added to the campaign.
- Campaign List:** This list can change over time (based on the dynamic filters of your data view and who has already been processed). While it's not important to

know where this list resides, it is stored as an EntitySet for those who are curious about the technical nature of the feature.

4. **Connections:** From the campaign list, connection requests are created. You may wonder, "Why not just create the connection request directly?" The answer is that we realize that it may take days or weeks to process through the list. We don't want the age of the connection requests to be skewed by the date the request was created, especially if it takes several days or weeks for a connector to be assigned. It might be perfectly reasonable for a request to be waiting for someone for several days. We want to be able to measure requests by age as a reflection of "are connectors working the requests efficiently". This provides good accountability to the process.

Now that we've looked at the feature from a 30,000-foot view, let's dive into each component in detail.

Campaign List

We start with the Campaign List page. This allows us to define as many campaigns as we'd like. You can find this list under "People > Connections > Connections Configuration > Campaign Lists".

Connection Campaigns

Home > Connections > Connection Types > Connection Campaigns

Campaign Name	DataView	Connection Opportunity	Active Requests	Pending Connections	Active
Seniors Connection Campaign	Adult Member & Attendees	Seniors Calling Campaign	7	0	<input checked="" type="checkbox"/> <input type="button" value="X"/>

50 500 5,000 | 1 Connection Campaign

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As you can see, this lists the campaigns and provides a few metrics about each. These include:

- **Active Requests** – This is the number of active connection requests that are currently open.
- **Pending Connections** – This is the number of people still on the campaign list waiting to be moved to a connection request.

Selecting a campaign will take us to the Campaign Detail page.

Campaign Detail Page

This page is the control center for a campaign's configuration. Below we walk through each section of the configuration.

Campaign Configuration

Home > Connections > Connection Types > Calling Campaign > Campaign Configuration

Seniors Connection Campaign

Campaign Configuration
Default Configuration for the campaign.

Campaign Name * 1
Seniors Connection Campaign

Active 2
 Yes

Connection Type 3
Contact Campaign

Connection Opportunity *
Seniors Calling Campaign

Request Comments Lava Template 11

Who Should Be Connected
Determines who will be considered for creating connection requests.

Requestor Data View 4
Adult Member & Att...

Family Limits 5
 Limit to Head of House Everyone in Data View

Opt Out Group 6
OPT OUT Calling Ca...

Auto Assignment Settings
These optional settings determine if request should be auto assigned.

Create Connection Requests 7
 As Needed All at Once

Daily Limit of Assigned Connection Requests 8
5

Recurrence Settings
The settings determine if connection should be created on periodic basis.

Number of Days Between Connection 9
14

Prefer Previous Connector 10

Save **Cancel**

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1. **Campaign Name:** The name of the campaign.

2. **Active:** Whether the campaign is currently active or not.
3. **Connection Opportunity:** The configures what connection opportunity the requests will be created in.
4. **Requestor Data View** – This is the data view that will be used to populate the campaign list.
5. **Family Limits** – It's often the case that you'll want to connect with just one person in the family. While you can attempt to configure your data view to handle this for you, we've made it easy to set this up. By checking "Limit to Head of Household" you can have your data view return as many people as you'd like, but only one connection per family will be made. The head of household will be used as the requestor for the entire family. This is also very helpful if your data view contains children, but you really want to reach out to the parents.
6. **Opt Out Group** – This setting will remove any group members of the selected group from the campaign list. While you could also add this to your data view, we've provided an easy out with this setting. Note that all families that the group member is a part of will be opted out of future connections.
7. **Create Connection Requests** – This setting helps determine when connection requests are made. You have the option of having them all created as soon as the job runs, or as they are needed. The 'As Needed' means they will be created as there are people ready for them. Doing it this way allows for better accountability as you'll know how long the request has been worked, vs knowing how long it sat before someone did work it.
8. **Daily Limit of Assigned Connection Requests** – This setting is only available for when the "Created Connection Requests" is set for "As Needed". This will automatically create the set number of requests for each connector each day. This acts as the global setting. Each connector can have overrides to the global setting. More on that in the "What to Know About Connectors" section. A value of 0 or blank will have the effect of not creating any connection requests from the job. In this configuration pattern all connection requests will be made on demand.
9. **Number of Days Between Connection** – This setting allows connection requests to be created on a routine basis for an individual (or family). Say you wanted to make a connection every 30 days with an individual. Set this value to 30 and thirty days after the original connection has been closed (status of Inactive or Connected) a new one will be created.

10. **Prefer Previous Connector** – This setting attempts to use the same connector for future requests. The key word here is ‘prefer’. If the original connector is not available or is over her daily limit, then the system will select a different connector.
11. **Request Comments Lava Template (Advanced Settings)** – This setting allows you to create customized "Comments" using this Lava template. The Person object and Family (group) object will be merged with this template prior to creating new connection requests. Example:

```
Please contact {{ Person.NickName }} with a quick phone call.  
Here are the family members:  
{% for m in Family.Members %}  
* {{ m.Person.FullName }} - {{ m.GroupRole.Name }}  
({{ m.Person.ConnectionStatusValue.Value }}, {{ m.Person.RecordStatusValue.Value }})  
{% endfor %}
```

Easy Opt Outs

Consider adding a simple manual workflow on your connection request that will add the requestor to the opt out group. This allows a connection to simply click a button to keep the individual (and their family) from being contacted in the future if your campaign is set to reoccur.

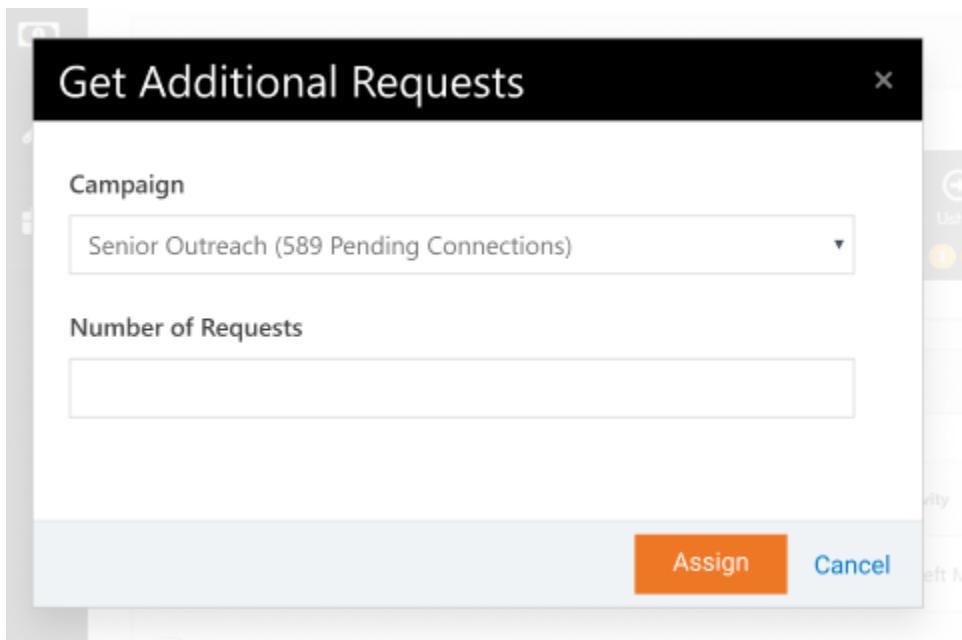
Working with Connection Requests

There's nothing special about working with the connection requests. We have added a new button at the top of the connections page (implemented as a new block for now). This button allows a person to create more requests from the campaign list for themselves.

The screenshot shows the 'Connections' page. At the top right, there is a search bar and a user profile icon. Below the header, the page title 'Connections' is displayed, along with a breadcrumb trail 'Home > Connections'. On the left side, there is a vertical sidebar with icons for Home, People, Reports, Tools, and Settings.

In the main content area, there is a button labeled '+ Campaign Requests' in a white box. Below it, there are filters for 'Campus' (set to 'All') and 'All' (with a dropdown arrow). A section titled 'My Connection Requests' shows three categories: 'Children's' (0), 'Greeter' (0), and 'Usher' (3). Each category has a small icon and a count. Below this, a 'Contact Campaign' section shows a 'Seniors Calling Campaign' with 7 pending requests. A link '→ Seniors Calling Campaign Connection Requests' is provided. At the bottom of the page, there is a 'Filter Options' dropdown and a set of icons for filtering and sorting.

Pressing this button will activate a modal to ask how many requests the individual would like to create.



Note

When creating new requests, the person will be assigned first to any current connection requests that do not have a connector assigned. Then new requests will be made from the Campaign List.

What to Know About Connectors

Connector Group Campus

When the system automatically marks people as connectors, it respects the connector group settings with respect to campus. Individuals in a connector group for all campuses will be available for any new request. Those in a group for a specific campus will only be available for requests that are marked for that campus (determined by the requestor's primary campus).

Connector Override Settings

When configured for auto assignments, connectors can have a specified number of requests assigned to them per day. The global setting is configured for the specified campaign. This can be overridden however using group member attributes on the connector groups. The keys for these attributes are required to be:

- `CampaignDailyLimit` (Integer) – The number of requests that the individual should be assigned a day.
- `CampaignScheduleDays` (Days of Week) – The days that the individual should be assigned requests.

Sample Recipes

Below are a few sample recipes to help you understand the feature in more detail.

Reoccurring Seniors Check-in

Say you'd like to make a calling campaign to check-in with seniors every two weeks.

Below are the high-level steps you'd need to accomplish to set this up.

1. Create a new Connection Type and Connection Opportunity for this new activity.
2. Add a Connection Group to the Connection Opportunity with the people who will be making the calls.

3. Create a data view with the seniors you'd like to call. This can be something like those over 65, or perhaps members of a group that a workflow from your website adds people to who have requested check-ins.
4. Create the Connection Campaign with the following settings:
 - a. Select the connect opportunity from step 1
 - b. Select the data view from step 3
 - c. Select "Family Limits" to "Everyone in the Data View"
 - d. Set "Create Connection Requests" to "As Needed" with a "Daily Limit of Assigned Connection Requests" to 10 (meaning each connector will get 10 calls a day).
 - e. Set the "Number of Days Between Connection" to 14. This will create a new request 14 days after the last request is closed.
 - f. Set "Prefer Previous Connector" to true, because who doesn't like to hear from the same person each time?

A new connection request will be created for each check-in. This helps provide good accountability to how quickly calls are made. Keep in mind that the connections features will show all activity for a person across all their requests. This helps you see previous notes. It's a win-win!

Bonus Points

Create a manual workflow to remove the person from the group that the data view uses to create the campaign list. This allows a volunteer to simply click a button if a senior decides that check-ins are no longer required.

Large Emergency Call List

Say there has been a local emergency and you need to make calls to reach out to numerous people in a specified area. One way to achieve this would be to follow the steps below.

1. Create a new Connection Type and Connection Opportunity for this new activity.
2. Add a Connection Group to the Connection Opportunity with the people who will be making the calls.
3. Create a data view with the individuals who need to be reached.
4. Create the Connection Campaign with the following settings:
 - a. Select the connect opportunity from step 1

- b. Select the data view from step 3
- c. Select “Family Limits” to “Limit to Head of Household” (each home only needs one call).
- d. Set “Create Connection Requests” to “As Needed” and a “Daily Limit of Assigned Connection Requests” to 0. This will allow people to get calls in batches to fill the amount of time they have to make calls.

Note

You could also use the setting to create all the requests at once. The only trick to this strategy is that it's possible that two individuals could assign themselves to the same request at nearly the same time. This could create duplicate calls. In an emergency no one has time to duplicate calls.

Get Help with Implementation

If this tool sounds like just what your organization is looking for, but you need help with the implementation, don't worry. Sparkability Group is fully trained and ready to help you set up this new service. Connect with our team at sparkabilitygroup.com to get started.