



Take Control of your Workflows

2014 DDI User Group Meeting
April 22-23, 2014



Serving those who serve others

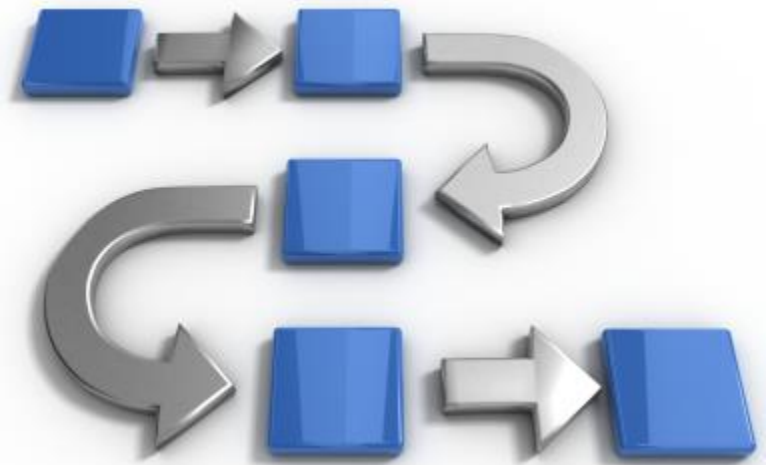




Procedures?

Checklists?

Processes?





Let's take 2 minutes and write down the
Processes in your organization...



Let's SHARE





Pitfalls for Not Defining Your Processes:

- ❑ Lack of Consistency
- ❑ No Accountability
- ❑ Cross Training Deterioration
- ❑ Items Fall Through The Cracks
- ❑ Disorganized
- ❑ Decline in Customer Service





Benefits of Defining Your Processes:

- ❑ Provides Visibility
- ❑ Improves Communication & Understanding
- ❑ Helps Organization-wide Planning
- ❑ Provides Ability to Capture Lessons Learned
- ❑ Provides Basis for Training
- ❑ Minimizes Missed Steps





Do You Need to Define Your Processes?

Consider the Following Questions:

- Is the process important for the business goals?
- Is there only one person who knows how to do the task?
- Do many people perform the task, but one way is preferred?

If you can answer “Yes” to any one of these questions, then you **NEED** to define your processes!

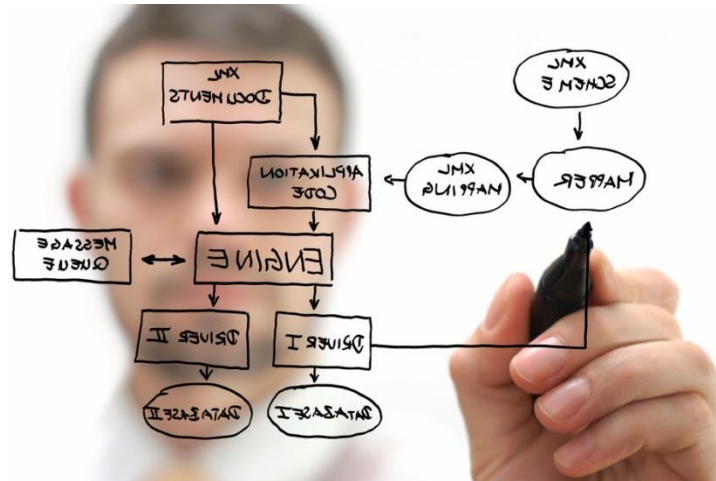




How Do You Define Your Process?

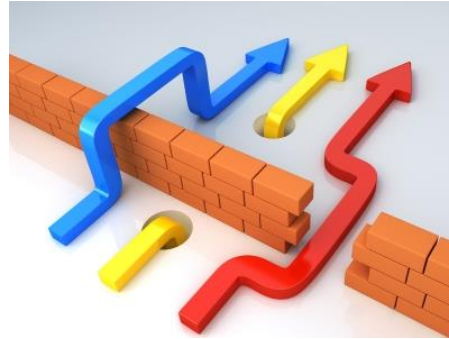


Document the Process





How Do You Define Your Process?



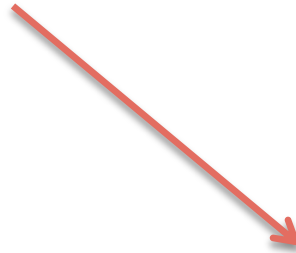
Look for Improvement





How Do You Define Your Process?

Implement



Process Management

File Dashboard Window

New Copy Edit Delete Save Undo Exit

Process Setup Steps

Filter: All

Process Title /	Created	Use With	Class	Category	Opp Amt
Other Secured Loan	11/15/2013	Loan	Other Secure...	New Loan Ap...	\$0.00
Secured Loan	11/14/2013	Loan	Secured Loan	New Loan Ap...	\$0.00
Unsecured Loan	11/15/2013	Loan	Unsecured Loan	New Loan Ap...	\$0.00

Title: Other Secured Loan
 Category: New Loan Application Use with: Loan
 Class: Other Secured Loan Allow users to reorder steps
 Auto assign steps to process owner
 Process active from: 11/14/2013 thru:
 Expected results: Complete the following steps to complete the loan process.
 Description: New Loan Application for a Other Secured Loan
 Opportunity amt: \$0.00
 Attachment:

Created By: pmchugh on 11/15/2013 Modified By: pmchugh on 11/15/2013

Process Management

Title: Other Secured Loan

Category: New Loan Application

Class: Other Secured Loan

Use with: Loan

Allow users to reorder steps

Auto assign steps to process owner

Process active from: 11/14/2013 thru: []

Expected results: Complete the following steps to complete the loan process.

Description: New Loan Application for a Other Secured Loan

Opportunity amt: \$0.00

Attachment:

Created By: pmchugh on 11/15/2013 Modified By: pmchugh on 11/15/2013

Name/Address
System → Setup →
Code Maintenance







New Edit Delete Codes Export

Master Code List

Code #	Description
0090	User-defined process category type codes
0091	User-defined process class codes
0092	User-defined process step actions
0093	User-defined process status codes
0094	Tables where User-defined processes can be attached
0095	User-defined process step status codes
0096	User-defined process STEP category type codes
0097	User-defined process STEP class codes
0098	Process Event Codes
.....

- Define the Process
- Assign a Category & Class
- Expected Results
- Process Description
- Use With
- Reorder Steps/Auto Assign Flags
- Opportunity Amount

Process Management

Process Setup Steps

Other Secured Loan

Step# /	Step Title	Duration	Class	Category	Action
1	Enter Church/Constituents i...	1	Mandatory	Pre-Approval	Email
2	Mail Application to the Borro...	1	Mandatory	Pre-Approval	Email
3	Setup Folders for Loan Doc...	0	Mandatory	Pre-Approval	Setup
4	Add Loan to Board Report S...	0	Mandatory	Pre-Approval	Setup
5	Follow-up on Application	5	Mandatory	Pre-Approval	Follow-Up
6	Scan Completed Application ...	5	Mandatory	Pre-Approval	Scan & Upload
7	Determine Collateral	0	Mandatory	Pre-Approval	Setup
8	Provide Documents to Assig...	1	Mandatory	Pre-Approval	Deliver
9	Prepare Risk Rating	2	Mandatory	Pre-Approval	Setup
10	Advisor Provides Terms of L...	3	Mandatory	Pre-Approval	Deliver

Title: Enter Church/Constituents into DDI-Connect & Setup a Loan Process

Category:
Probability: 0.00%

Class:
Expected duration: 1 days

Action:
 Optional

Removable




Role assignment:

Expected results: Enter preliminary data into DDI-Connect for tracking

Description:

1. Enter Church &/or Constituents into DDI-Connect.
2. Add a Account for the Borrower
3. Add a Loan to the Account of Borrower
4. Add Process to the Loan Record

Attachment:

Created By: pmchugh on 11/14/2013 Modified By: pmchugh on 11/15/2013

Process Management

Title: Enter Church/Constituents into DDI-Connect & Setup a Loan Process

Category: Pre-Approval
Class: Mandatory
Action: Email

Probability: 0.00%
Expected duration: 1 days
 Optional
 Removable

Role assignment:

Expected results: Enter preliminary data into DDI-Connect for tracking

Description:
1. Enter Church &/or Constituents into DDI-Connect.
2. Add a Account for the Borrower
3. Add a Loan to the Account of Borrower
4. Add Process to the Loan Record

Attachment:
Created By: pmchugh on 11/14/2013 Modified By: pmchugh on 11/15/2013

Name/Address
System →
Setup → Code
Maintenance

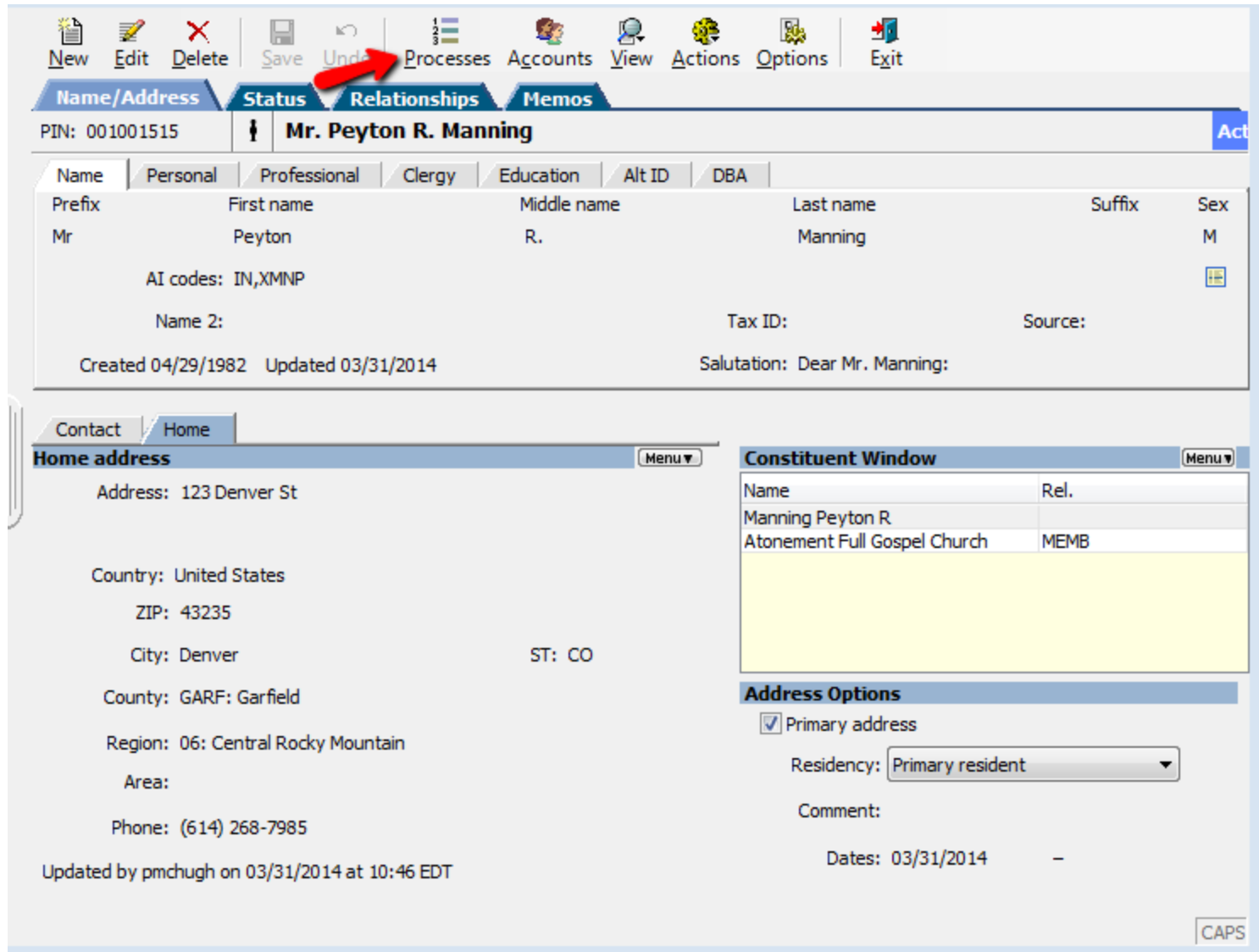
- Define the Step
- Assign Duration
- Enter Category, Class, Action
- Assign the Task to a User
- Enter Expected Results
- Enter Additional Directions
- Add Attachments/Support Documents

New Edit Delete Codes Export

Master Code List

Code #	Description
0090	User-defined process category type codes
0091	User-defined process class codes
0092	User-defined process step actions
0093	User-defined process status codes
0094	Tables where User-defined processes can be attached
0095	User-defined process step status codes
0096	User-defined process STEP category type codes
0097	User-defined process STEP class codes
0098	Process Event Codes
....

Add A New Process



The screenshot shows a software interface with a menu bar at the top containing: New, Edit, Delete, Save, Undo, Processes, Accounts, View, Actions, Options, and Exit. A red arrow points to the 'Processes' menu item. Below the menu bar are tabs for Name/Address, Status, Relationships, and Memos. The main area displays information for 'Mr. Peyton R. Manning' with a PIN of 001001515. A table below shows name details: Prefix (Mr), First name (Peyton), Middle name (R.), Last name (Manning), Suffix, and Sex (M). It also lists AI codes (IN, XMNP), Name 2, Tax ID, Source, and creation/update dates (Created 04/29/1982, Updated 03/31/2014). A salutation 'Dear Mr. Manning:' is shown. Below this are 'Contact' and 'Home' tabs. The 'Home address' section shows: Address: 123 Denver St, Country: United States, ZIP: 43235, City: Denver, ST: CO, County: GARF: Garfield, Region: 06: Central Rocky Mountain, Area, and Phone: (614) 268-7985. An update note at the bottom reads: 'Updated by pmchugh on 03/31/2014 at 10:46 EDT'. On the right, a 'Constituent Window' table shows Manning Peyton R. as a member of Atonement Full Gospel Church. Below it, 'Address Options' include a checked 'Primary address' checkbox, a 'Residency' dropdown set to 'Primary resident', and a 'Comment' field. At the bottom right, 'Dates: 03/31/2014' and a 'CAPS' button are visible.

Menu: New Edit Delete Save Undo Processes Accounts View Actions Options Exit

Name/Address Status Relationships Memos

PIN: 001001515 Mr. Peyton R. Manning

Name	Personal	Professional	Clergy	Education	Alt ID	DBA		
Prefix	First name			Middle name		Last name	Suffix	Sex
Mr	Peyton			R.		Manning		M

AI codes: IN, XMNP

Name 2: Tax ID: Source:

Created 04/29/1982 Updated 03/31/2014

Salutation: Dear Mr. Manning:

Contact Home

Home address Menu

Address: 123 Denver St

Country: United States
ZIP: 43235
City: Denver ST: CO
County: GARF: Garfield
Region: 06: Central Rocky Mountain
Area:
Phone: (614) 268-7985

Updated by pmchugh on 03/31/2014 at 10:46 EDT

Constituent Window Menu

Name	Rel.
Manning Peyton R	
Atonement Full Gospel Church	MEMB

Address Options

Primary address

Residency: Primary resident

Comment:

Dates: 03/31/2014

CAPS

Add A New Process

View | New | Exit

Process History | Completed Step History

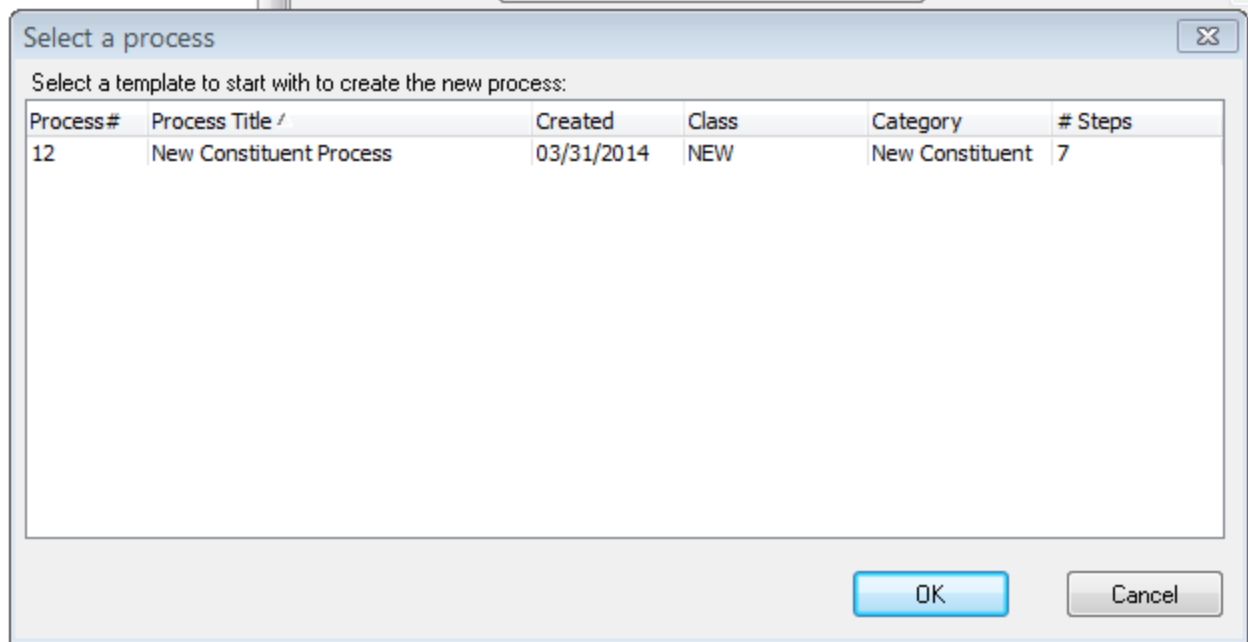
Linked to Constituent 1001515
Peyton R. Manning

Process Title	Status	Class	Category	Start Date	End Date
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Seq# /	Step Title	Status	Start Date	End Date	Finished By
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CAPS

Add A New Process



Add A New Process

Process title: New Constituent Process Linked to Constituent 1001515
Peyton R. Manning

Filter:

Step# /	Step Title	Assign To	Start	End	Status	Action
1	Enter Information into DDI-...	pmchugh				Deliver
2	Enter Tax ID	pmchugh				Deliver
3	Enter Relationships	pmchugh				Deliver
4	Enter AI Code Classification	pmchugh				Deliver
5	Tell Our Story	pmchugh				Meeting
6	Provide them their Investm...	pmchugh				Meeting
7	Enter Memo	pmchugh				Deliver

| |

Step title: Enter Information into DDI-Connect
 Expected results: Enter Constituent Information into DDI-Connect
 Expected action: Deliver
 Description:

Start date: Finish date: By:
 Projected start: 03/31/2014 Projected finish: 04/01/2014

Notes:

Assigned to: pmchugh Assigned to role:
 Created by: pmchugh on 03/31/2014 Modified by:

Add A New Process

Process title: New Constituent Process

Filter: All

Linked to Constituent 1001515
Peyton R. Manning

Step# /	Step Title	Assign To	Start	End	Status	Action
1	Enter Information into DDI-...	pmchugh				Deliver
2	Enter Tax ID	pmchugh				Deliver
3	Enter Relationships	pmchugh				Deliver
4	Enter AI Code Classification	pmchugh				Deliver
5	Tell Our Story	pmchugh				Meeting
6	Provide them their Investm...	pmchugh				Meeting
7	Enter Memo	pmchugh				Deliver

Step Info | **Process Info** | Step Attachments

Process owner: pmchugh

Expected results: Gather information from new constituent and ask cross selling questions

Category: New Constituent

Class: NEW

Attachment:

Description: Gather information from new constituent and ask cross selling questions

CAPS

Add A New Process

Process title: New Constituent Process

Filter: All

Linked to Constituent 1001515
Peyton R. Manning

Step# /	Step Title	Assign To	Start	End	Status	Action
1	Enter Information into DDI-...	pmchugh				Deliver
2	Enter Tax ID	pmchugh				Deliver
3	Enter Relationships	pmchugh				Deliver
4	Enter AI Code Classification	pmchugh				Deliver
5	Tell Our Story	pmchugh				Meeting
6	Provide them their Investm...	pmchugh				Meeting
7	Enter Memo	pmchugh				Deliver

Step Info | Process Info | **Step Attachments**

File Name /	Attached By	Added On	Size (KB)
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Add A New Process

Process title: New Constituent Process
Filter: All

Step# /	Step Title	Assign To	Start	Action
1	Enter Information into DDI-...	pmchugh	03/31	Deliver
2	Enter Tax ID	pmchugh		Deliver
3	Enter Relationships	pmchugh		Deliver
4	Enter AI Code Classification	pmchugh		Deliver
5	Tell Our Story	pmchugh		Meeting
6	Provide them their Investm...	pmchugh		Meeting
7	Enter Memo	pmchugh		Deliver

Step Info | Process Info | Step Attachments

Step title: Enter Tax ID
Expected results: Enter Tax ID
Expected action: Deliver
Description: Enter Tax ID

Start date: Finish date: By:
Projected start: Projected finish:

Notes:

Assigned to: pmchugh Assigned to role:
Created by: pmchugh on 03/31/2014 Modified by:

CAPS

User Activities

File Dashboard Window

Search View Process Actions Exit

See my list OR See activities assigned to:

Source: All Category: Include completed steps

Action: Class:

Filter the results further after searching:

Projected date: All Start from: thru: Apply

Source Type	Source ID	Source Name	Process Title	Step Title	Status	Assigned	Action	Step X
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Enter Tax ID	Started	pmchugh	Deliver	2
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Enter Relationships		pmchugh	Deliver	3
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Enter AI Code Class...		pmchugh	Deliver	4
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Tell Our Story		pmchugh	Meeting	5
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Provide them their I...		pmchugh	Meeting	6
Constituent	1001515	Peyton R. Manning	New Constituent Pr...	Enter Memo		pmchugh	Deliver	7

Where Used Inquiry

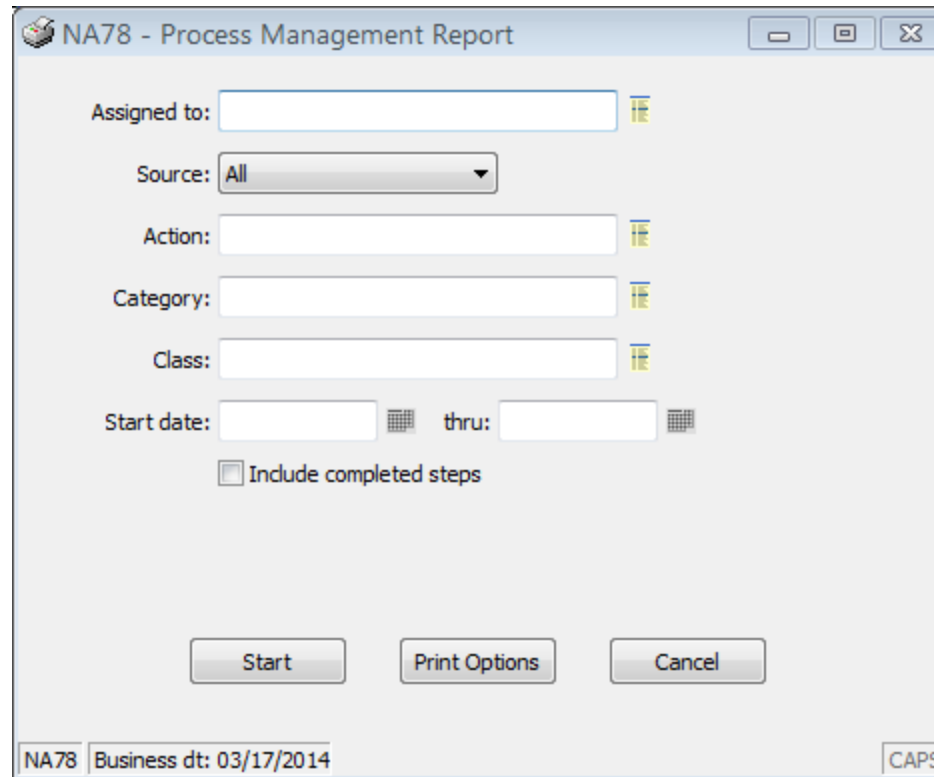
The screenshot shows a software application window with a menu on the left and a main workspace on the right. The menu includes 'File', 'Dashboard', and 'Window'. Under 'Window', there is a 'Where Used Inquiry' option, which is highlighted with a red arrow. The main workspace contains a search interface with the following elements:

- Buttons: Search, Clear, View Process, Exit
- Text: Select process(es): OR Search by process name: ** Processes selected from pop-up **
- Checkbox: Include completed processes
- Text: Processes started from: thru:
- Text: Source: All (dropdown) Class: Category:

Below the search filters is a table with the following data:

Process Title	Source Type	Source ID	Source Name	Status	Class	Category	Finished On	Last Step Completed	Last Co
New Constituent Pr...	Constituent	1001515	Peyton R. Manning	Started	NEW	New Cons...		1 of 7	03

Report



NA78 - Process Management Report

Assigned to:

Source: All

Action:

Category:

Class:

Start date: thru:

Include completed steps

Start Print Options Cancel

NA78 Business dt: 03/17/2014 CAPS

Discussion, Questions, Comments



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