# Voces Vitales Costa Rica Website and CRM Implementation Guide









Website and Customer Relationship Management Balsamiq Mockups

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## **Table of Contents**

Table of Contents	1
Welcome	3
Section 1: Platform Navigation Training Manual for VVCR Mentors and Admin	istrators 4
The Website - Desktop View	4
Accessing Documents	7
Accessing the Media Library	11
Accessing the FAQ	16
Updated Events Page to the Public VVCR Website	18
The Website - Mobile View	19
Accessing Documents	20
Accessing the Media Library	23
Accessing FAQ	26
The CRM - Mentor Desktop View	28
Using Features on the Homepage	30
Accessing and Editing Your Personal Profile	32
Completing Documentation for the Mentoring Process	33
Networking Features Within the CRM	36
Finding Other Mentor Profiles	38
Using the Business Directory	41
Accessing Media Library Content	44
Accessing the FAQ Page and Submitting a Question	51
The CRM - Mentor Mobile View	52
Accessing My Profile	55
Completing Documentation for the Mentoring Process	57
Accessing VVCR Network	60
Accessing the Media Library	65
Accessing FAQ	69
The CRM - Administrator Desktop View	70
Updating Announcements	71
Calendar Update Page	73
Weekly Spotlight Update Page	75
Viewing Mentor Submissions	76
Viewing Personal Profiles	78
Accessing Projects/Documentation	79
Searching for Other Mentors and VVCR Staff	84

Accessing the Media Library	90
Accessing and Responding to FAQ	96
Section 2: Platform Navigation for De La Guayaba	99
Website Sitemap	100
CRM Mentor View Sitemap	101
CRM Admin View Sitemap	102
Section 3: Recommendations to Voces Vitales Administrators and Executive Board	103



## Welcome!

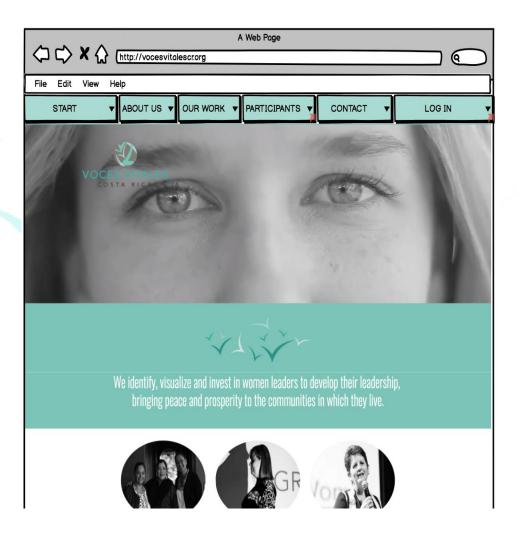
This implementation guide was created to supplement the technological mockups for Vital Voices Costa Rica's (VVCR) website and CRM to aid in the creation and implementation of the proposed system updates. The information within this implementation guide is divided into two major sections: the website and the CRM. Each of these sections is then broken up further into a mentor viewpoint and an administrator viewpoint. Users defined in this implementation guide are mentors at Vital Voices, who will be using the system to improve their interactions with VVCR throughout mentoring processes, as well as administrators, who are tasked with upkeep, content approval, the addition/deletion of necessary content. VVCR is also tasked to ensure that the suggestions within this implementation guide are followed by De La Guayaba, its hired outside design team. This implementation guide details the breakdown of features, how to use and understand them, how to upkeep the system(s), and general suggestions for both the organization and De La Guayaba.

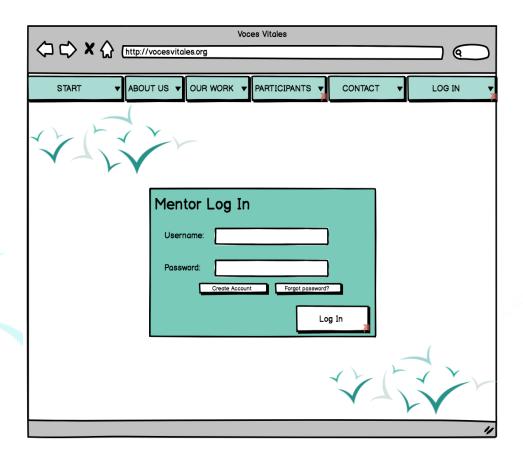
# Section 1:

Platform Navigation Training
Manual for VVCR Mentors
and Administrators

## The Website – Desktop View

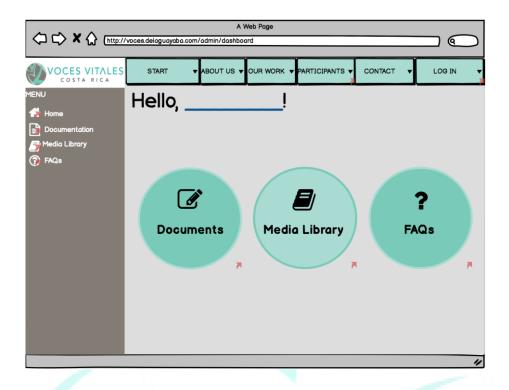
The current VVCR website (vocesvitalescr.org) is out of date, featuring events that only lead up to August of 2016. Pages on the website that require updating include the public event page and the integration of an additional menu tab for a mentor log in. Upon clicking the newly created 'Log In' tab, mentors can log in with a personal email/username and password.





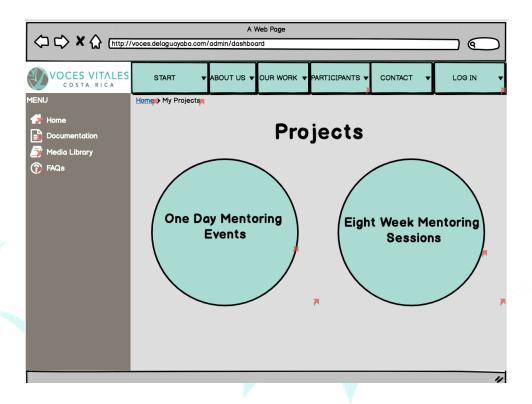
Once logged in, mentors will be brought to the 'Home' page contained in an external link. On the homepage, mentors will see the same upper tabs as the existing web page for easy access back to the general VVVR website. On this homepage, there are three circles leading to 'Documents,' 'Media Library,' and 'FAQ.' On the left page of the screen, there is also a menu that stays on each page, housing the 'Home' page,' 'Documentation,' 'Media Library,' and 'FAQ.' The 'Documentation' page houses all necessary forms for mentors. 'Media Library'

provides links to videos, pictures, links, and VVCR social media. The 'FAQ' page contains common questions asked by VVCR mentors.



#### **Accessing Documents:**

Upon clicking the 'Documents' button on the homepage, or 'Documents' tab on the left side menu, the mentor is brought to a page titled 'My Projects.' Here there are two circles, one labeled 'One Day Mentoring Events' and the other 'Eight Week Mentoring Sessions.'



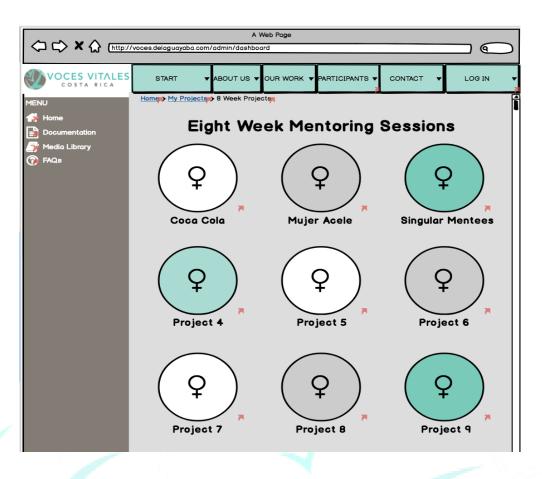
Depending on which project type the mentor is looking for, once the applicable button is clicked, the mentor is brought to a page listing all of the 'One Day Mentoring Events' or 'Eight Week Mentoring Sessions.' If the mentor selects 'One Day Mentoring Events,' she or he is immediately brought to a page with three tabs for the necessary forms. The tabs are located on the left of the teal box. If the mentor clicks on the first tab 'Commitment Form' and then the download icon at the center of the teal box, she or he will be brought to the connected google form. The same action occurs when the mentor clicks the 'Log Book Form' and the 'Feedback Form.'



On the top of this 'One Day Mentoring Events' page, there are breadcrumb links, giving the mentor easy access to retrace her or his steps and get back to the homepage.



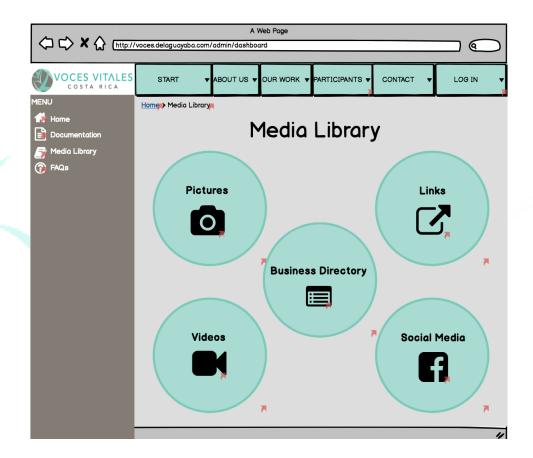
If the mentor wants to access the 'Eight Week Mentoring Session' forms within the 'Documentation' page with the two circles, she or he should select the 'Eight Week Mentoring Sessions' page. Once this circle is selected, the mentor will be brought to a page titled 'Eight Week Mentoring Sessions' and on the page is a list of all of the eight week projects. The mentor should select the appropriate project. From there she or he is brought to a page with a teal box with eleven tabs. The tabs are labeled 'Photo Waiver,' 'Pre-Leadership Test,' 'Week 1,' 'Week 2,' 'Week 3,' 'Week 4,' 'Week 5,' 'Week 6,' 'Week 7,' Week 8,' and 'Post - Leadership Test.' Each tab brings up a new page with a download button. If the mentor clicks on the download button, she or he will be brought to the applicable google form for the selected tab. (The 'Photo Waiver' page has both an upload and download button due to the nature of the form).





#### **Accessing the Media Library:**

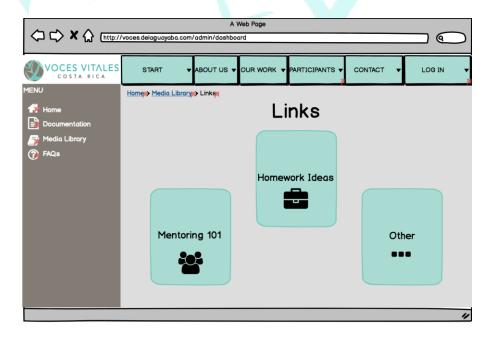
From the homepage, the mentor should select the center button labeled 'Media Library.' The media library can also be accessed by clicking the third tab on the menu bar on the left side of the page labeled 'Media Library.' Once selected, the mentor will be brought to a page titled 'Media Library.' Located on this page are five circles. Starting from the top left and going clockwise, the circles are labeled 'Pictures,' 'Business Directory,' 'Links,' 'Social Media,' and 'Videos.'



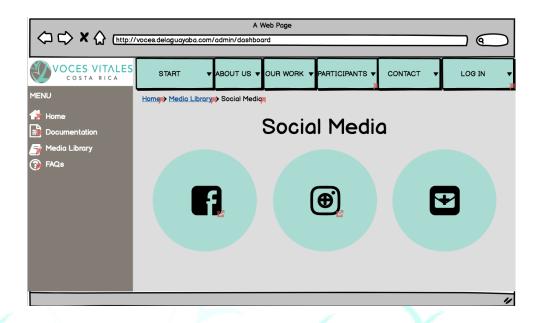
If the mentor selects the 'Pictures' page, she or he is brought to a page with a list of photos from different VVCR events. When the mentor clicks on the folder she or he is looking for, she will be brought to the Flickr page where the photos are housed.



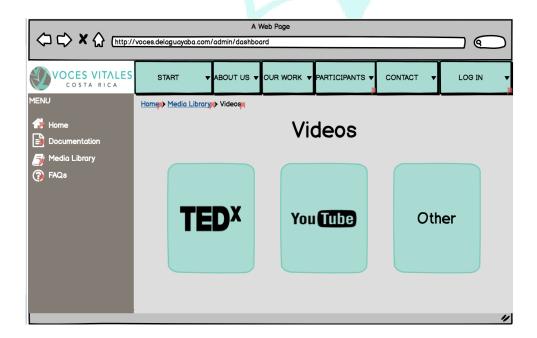
If the mentor clicks on the 'Links' page, she will be brought to an additional page with helpful resources categorized by subject.



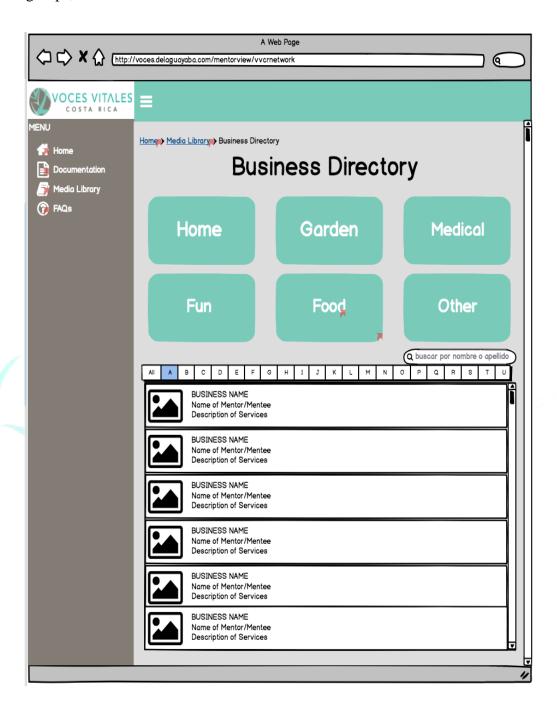
When the 'Social Media' button is clicked, the mentor is brought to a page with icons for each of VVCR's social media platforms. When each platform button is clicked the mentor is directed to an external social media page.



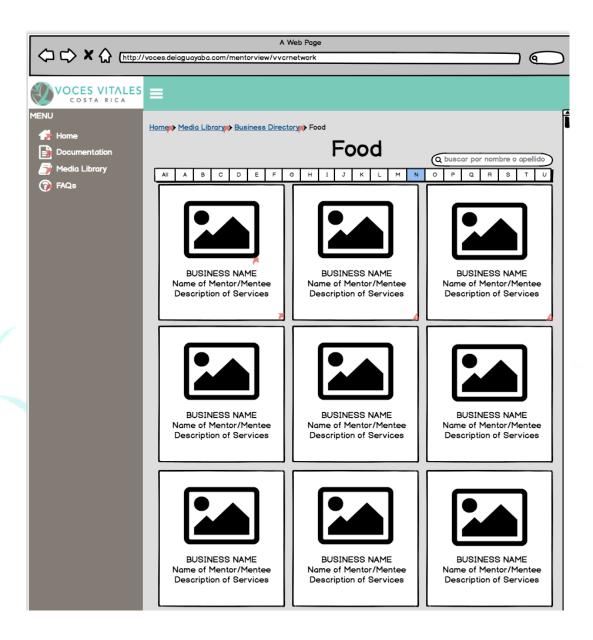
Clicking the 'Videos' button will bring the mentor to a page with folders of videos categorized by subject. Then, when the video of interest is clicked, the mentor is brought to a separate page with the video.



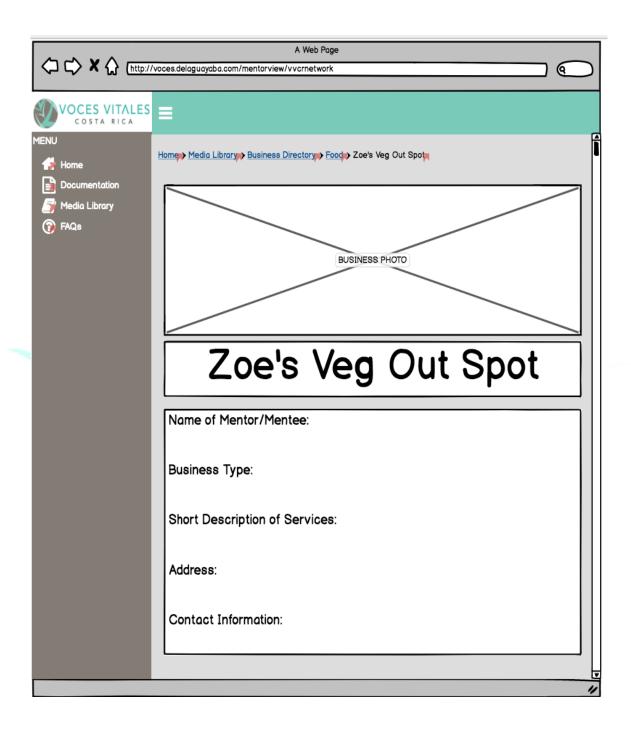
When the mentor clicks on 'Business Directory' she or he is brought to a page with buttons for business groups, below which is a master list of all the businesses.



If a specific category is selected, the mentor is brought to a page with a business card display for the category.

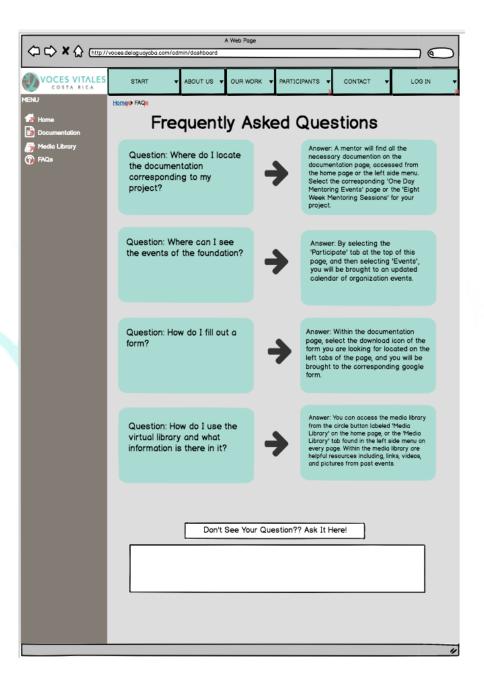


When an individual business is selected from this shortened list, the mentor is brought to a page specific to the business. This pages provides the mentor with basic information including name, location, and contact information.



## Accessing the FAQ:

From the home page, if the mentor clicks the third button to the right, or last tab on the menu, she or he is brought to the FAQ page. Here the mentor can read commonly asked questions, and at the bottom, submit her own.



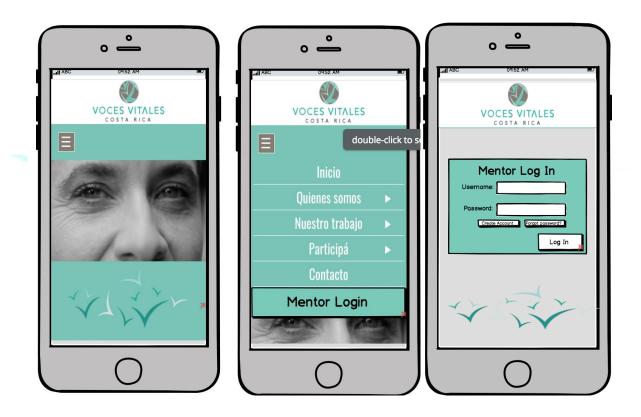
### **Updated Events Page to the Public VVCR Website:**

The current 'Events' page on the VVCR website will contain a monthly calendar view of events. This calendar will have highlighted numbers for important dates. If the mentor or website visitor hovers over a highlighted date, a popup window will appear to the right of the calendar. This popup window provides extensive details about the event: name and date of event, a description of the event, and an image for the event. Below the events calendar is a grid of images that are labeled with descriptions of past events.

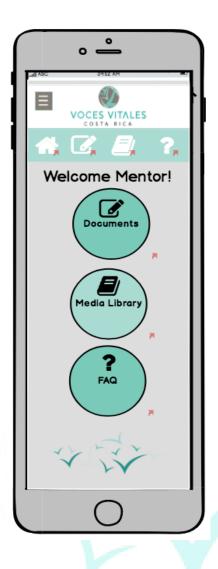


## The Website - Mobile View

If the mentor is accessing the VVCR website on her phone, she or he is brought to the existing mobile view of the website. If she or he clicks on the icon with three lines, on the top left of the page, the mentor will be brought to a drop down menu. If the final tab in the menu, 'Mentor Login,' is clicked the mentor will be brought to a login portal.



Upon entering a personal username and password, the mentor is brought to the home screen containing a navigation bar at the top of the screen with three circular buttons further down the screen.



At the top of every page within this portal is a navigation bar containing four icons. The first one is the 'Home' icon which brings the user back to the homepage. The next icon is the 'Documentation' icon and leads the mentor to a page to access necessary forms for one day mentoring events and eight week mentoring sessions. The third icon leads the user to the 'Media Library' page, and the final icon gives access to 'FAQ.' Additionally on this homepage, there are three vertical buttons labeled sequentially, 'Documents,' 'Media Library,' and 'FAQ.' When clicking on each button, the user is brought to the appropriate page.

## **Accessing Documents:**

If a mentor clicks on the 'Documents' icon at the top bar of the page, or the top circle labeled 'Documents,' she is brought to a documents page which displays two circles: one labeled 'One Day Mentoring Events' and the other titled 'Eight Week Mentoring Sessions.'

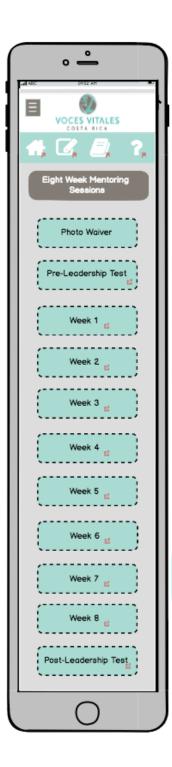


If the mentor clicks on the 'One Day Mentoring Events' page she will be brought to a page with a list of all of the necessary forms: 'Commitment Form,' 'Log Book Form,' and

'Feedback Form.' When each button is clicked, the mentor is brought to the attached google form.



On the documentation page, if the mentor selects the 'Eight Week Mentoring Sessions,' she is brought to a similar page with all of the necessary forms: 'Photo Waiver,' 'Pre-leadership Test,' 'Week 1,' 'Week 2,' 'Week 3,' 'Week 4,' 'Week 5,' 'Week 6,' 'Week 7,' 'Week 8.' When the mentor clicks on each title of the form, she is brought to the corresponding google form.



### **Accessing the Media Library:**

If the mentor selects the third icon at the top for 'Media Library' or the second button on the home page labeled 'Media Library,' the mentor is brought to the 'Media Library' page. On this page, the mentor will see five circles with five different icons. Starting at the top left icon and going clockwise, the icons are 'Photos,' 'Business Directory,' 'Links,' 'Social Media,' and 'Videos.'



If the mentor selects the 'Pictures' page, she is brought to a page with a list of photos from different VVCR events. When she clicks on the desired folder, she is directed to the Flickr page where the photos are housed. If the mentor clicks on the 'Links' page, she is brought to an additional page with help resources categorized by subject. When the mentor clicks on the 'Social Media' button, she is brought to a page with icons for each of VVCR's social media platforms. When each platform button is clicked, the mentor is directed to an external social media page. When the mentor selects the 'Videos' page, she is brought to a page with folders of

videos categorized by subject. When the video of interested is selected, the mentor is brought to a separate page with the video.

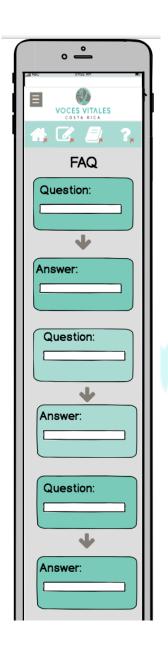


When the mentor clicks on 'Business Directory' she is brought to a page with buttons for groups of businesses, below which is a master list of all the businesses. If the mentor selects a specific category, she is brought to a page with a business card display. Once a business is selected, the mentor is directed to a page specific to the business. This pages provides the mentor with basic information including name, location, and contact information.



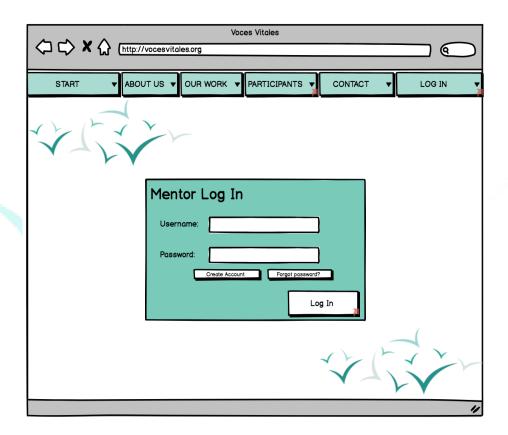
## **Accessing FAQ:**

If the mentor selects the fourth icon at the top of the homepage labeled 'FAQ' with a question mark icon, or the third button on the homepage labeled 'FAQ,' she or he is brought to the FAQ page. On this page the mentor will see commonly asked questions with corresponding answers. On the bottom of the page is a field for mentors to submit additional questions.



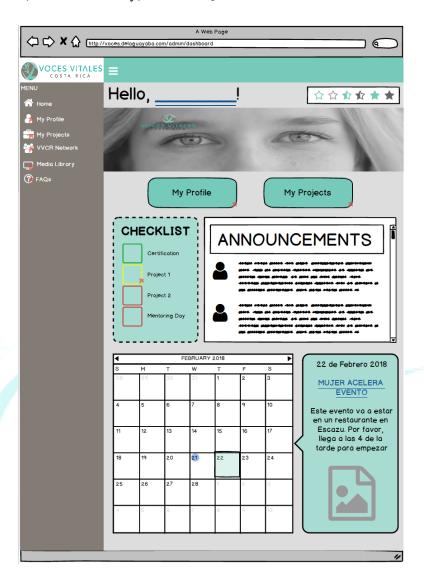
## The CRM - Mentor Desktop View

The newly designed CRM is a centralized platform that allows for mentor access. The user in this section refers to a mentor of VVCR. The CRM can be accessed from VVCR's public website, vocesvitalescr.org, just as with the previous website login. The website will include a login tab across the top menu bar as before. Upon clicking 'Login,' The user will be prompted with the same screen to input a username and password.



Once logged in, the user is brought to the homepage and greeted by name. Next to the user's name are the badges earned throughout the mentoring experience. The homepage is equipped with announcements from VVCR, a calendar with future events, a checklist to show what the user has completed or still needs to complete, and links to the user's profile or projects.

On the left side of the homepage is a side menu bar. The side menu bar is present on each page within the CRM to allow for easy navigation. These tabs include, 'Home,' 'My Profile,' 'My Projects,' 'Network,' 'Media Library,' and 'FAQ.'



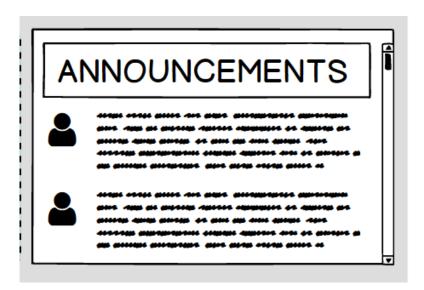
A mentor will always be able to retrace her steps throughout the process of navigating the website. Each page contains breadcrumbs located at the top of the page to the right of the menu bar. These breadcrumbs serve to show the mentor the steps taken to get to the page they are on and allows a mentor to return to each previous page they were on.

#### **Using Features on the Homepage:**

The checklist on the homepage displays tasks to help keep a mentor accountable for documentation. These tasks could include 'Submit Documentation for Project 1' or 'Mentoring Day Documentation' and are linked to mentor's specific projects. When the task is displayed in red, the mentor must still complete it. When the task is shown in yellow, the mentor has submitted and is waiting for approval, and when the task is green, the submission has been approved by VVCR administrators . A mentor can click on the task and be directed to the documentation page. For new mentors, checklist tabs dealing with certification forms will also appear. Additionally, if a mentor has been inactive for some time, a task such as 'Sign up for an Event' may be added.



The calendar and announcements both house information marketed by VVCR. The announcements section is a feed of listed information for proposed new projects and events. When VVCR posts a project opportunity, a link to more information will be included in the announcement including and a place to sign up for the event. These links can be clicked directly from the announcements box to be brought to the external sign up or events page.



For the calendar, the current month is shown directly. On the calendar, days with events are highlighted in teal. A mentor can click on any highlighted day and the event information will pop up with the name, date, and description on a sidebar to the right. This sidebar window may also include relevant links to sign up for events and projects. A mentor can view past and future months by clicking on the black arrows located on the top left and right corners of the calendar.



## **Accessing and Editing Your Personal Profile:**

There are two ways to view the mentor's personal profile. The first is the 'My Profile' button on the homepage and the second is the 'My Profile' tab on the menu bar to the left of the CRM. The 'My Profile' and "Homepage' tab on the menu bar will always be visible to the mentor. When mentor clicks on the 'My Profile' tab or button, she or he will be brought to a personal profile shown below.



Located below the profile picture is a smaller box that houses a short biography written by each user. Below the text area containing the biography, there are two smaller boxes. The box on the left hand side contains contact information. Some suggested fields are telephone number, email address, and mailing address. Directly to the right of the information box and below the biography box is another small box titled 'About Me.' In this text field, the user can input information such as their name, age, languages spoken, preferred communication and any other relevant information. In each of the above features, the user will have the ability to decide which information is displayed to the public and which she'd prefer to keep private. To edit any of these fields, click the pencil icon in the lower right corner of the box and fill in any personal information. Shown below is a screenshot of an edit button.



At the very bottom of the page, below the information boxes previously mentioned, there is an area for Interests and Skills with which the user may affiliate. Once the pencil icon is clicked in the bottom right corner of the box, similar to LinkedIn, users will be prompted to select from a predetermined list of activities, interests or skills. The selected interests will then be displayed in the box at the very bottom of the profile page.

Two other features found on a mentor profile page are the badges, shown as stars in our designs, and the number of projects, shown as '# of projects completed [number].' The badges are achieved at certain levels of participation, e.g. has completed mentor training, has completed 2 mentoring sessions, etc. Both the badges and number of projects fields are automatically updated as projects are completed, badges are earned, or either projects or badges are updated by an administrator. They can't be edited by a mentor. Additionally, if a mentor clicks on the projects completed, she will be brought to the 'My Projects' page that shows the current and past projects she has completed.

## **Completing Documentation for the Mentoring Process:**

All documents that need to be filled out by mentors can be found within the CRM. To access the documentation, a mentor will first navigate to the 'My Projects' page. There are three links within the CRM to bring a mentor to his or her personalized projects page. The first is located to the right of the 'My Profile' button on the homepage. The second is the third tab down located within the side menu bar. As mentioned previously, the third is the '# of projects completed' button located at the top right of the mentor profile.



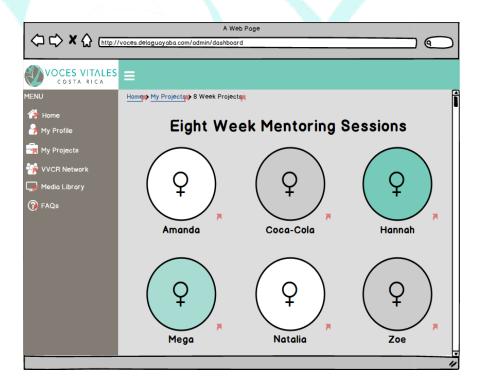
The 'My Projects' page, shown below, is further broken down into two sections: 'One Day Mentoring Events' and 'Eight Week Mentoring Sessions.' Depending on which type of

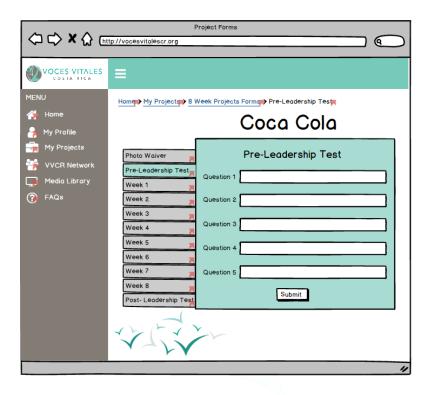


project the mentor is looking for, she can click on either button. Upon clicking 'One Day Mentoring Events,' the mentor can see the three forms needed for these events. The mentor will click on a link for each and will be brought to a google form to fill out.



Upon clicking 'Eight Week Mentoring Sessions,' the mentor is brought to a page displaying each of the projects she or he is involved in. The mentor will then choose a specific project or mentor to be brought to the documentation page.





The documentation is then split up into the 'Photo Waiver,' the 'Pre-Leadership Test,' each log for the eight weeks, and the 'Post-Leadership Test.' Each has its own tab that the mentor can click on and contains the corresponding necessary documents. For the 'Photo Waiver' the document must be downloaded and re-uploaded as it requires a physical signature. For the logs and leadership tests, the mentor can directly input the information on the CRM page. An example of week one is shown below.

Once the required information is filled out in the form, the mentor must click submit. This information will be sent to the admins for review and the checklist on the homepage will display the completion, indicated by yellow text. Once the administrator reviews the submission, the text will become green.

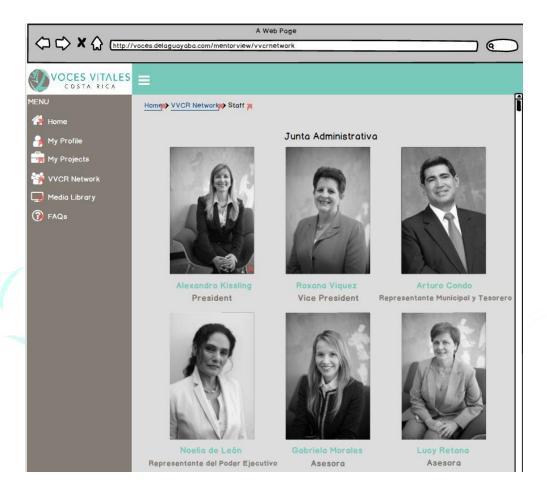
### **Networking Features Within the CRM:**

The new CRM allows mentors to search and learn about other members of the VVCR community. A mentor can access the profiles of VVCR Staff and other mentors by clicking 'VVCR Network,' located in the side menu bar. Here the mentor can also access a business directory containing a list of all mentor owned and run businesses. After clicking the 'VVCR Network' tab, a mentor is prompted with three buttons: 'Staff,' 'Mentors,' and 'Business Directory.'



#### **Finding Staff Profiles:**

Upon clicking 'Staff,' a mentor can access a list of VVCR executives with their picture, name, and job title. A mentor can then click on a specific staff member to view his or her profile.



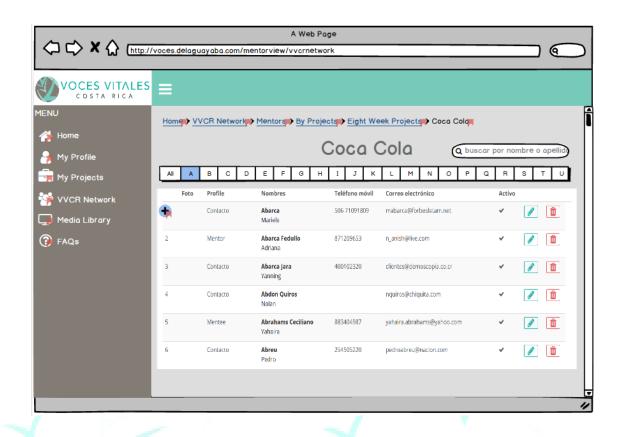
### **Finding Other Mentor Profiles:**

Upon clicking 'Mentors,' mentors can access a complete list of all VVCR mentors. The mentors appear alphabetically in a list at the bottom of the screen. Additionally, there is an alphabet bar above the list of names that allows a mentor to narrow down the master list by searching for the beginning letter of the last name. Further refinement of the list can be achieved by clicking affinity group buttons at the top of the screen. Affinity groups include categories such as 'Projects' and 'Location.' If the mentor clicks projects, for example, a page containing all the project names appears. The mentor can then click into a specific project and view a list of the mentors within that project. If a mentor clicks on a specific name, she or he will be brought to that mentor's personal profile.







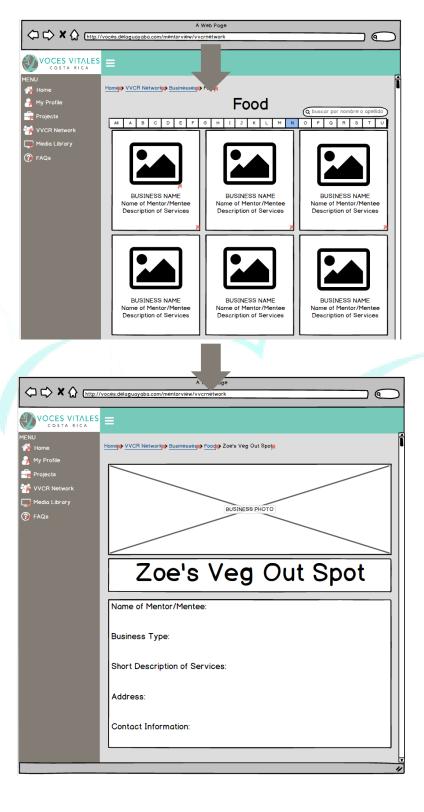


### **Using the Business Directory:**

Upon clicking the 'Business Directory,' a mentor can access a list of businesses that mentors, executives, and mentees want to promote. As with the mentor's directory, businesses are listed alphabetically at the bottom of the page and a mentor can search through the businesses alphabetically by the first letter. The search can further be refined by clicking the affinity groups at the top of the page. These affinity groups sort businesses by sectors including 'Home,' 'Medical,' and 'Food.' If a mentor clicks on the affinity group, it leads to a page containing the information of relative businesses. A mentor can then click on a specific business to see all the information associated including a picture, the name of the business, the name of the mentor,

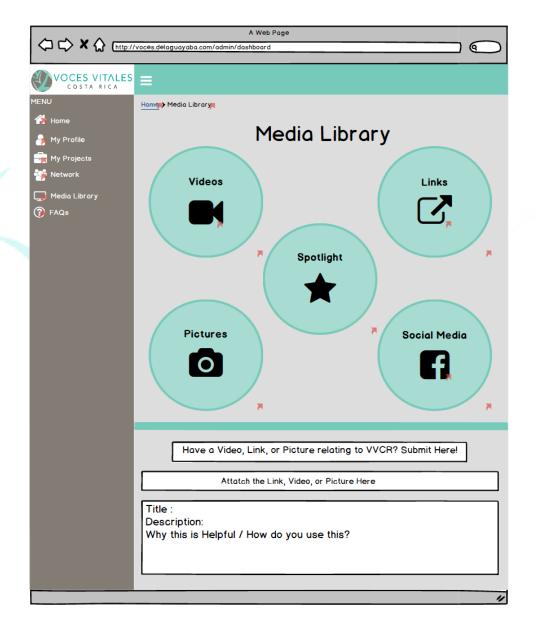


mentee, or staff member, the type of business, a short description, the address, and the contact information.

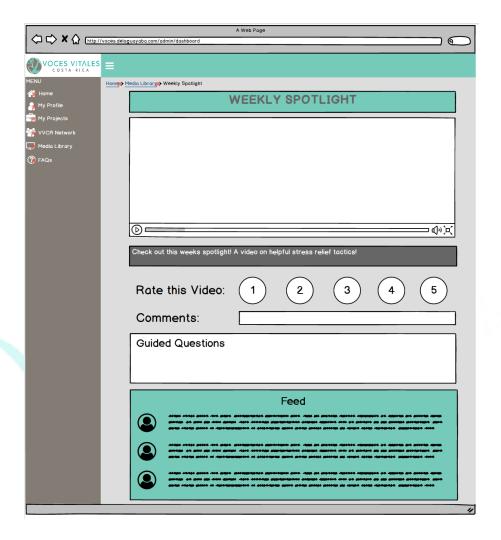


### **Accessing Media Library Content:**

Located on the side menu bar as the fifth tab down, a mentor can access the 'Media Library.' Upon clicking, the mentor is brought to a page containing five circles labeled 'Videos,' 'Links,' 'Weekly Spotlight,' 'Pictures,' and 'Social Media.' By clicking one of the circles, a mentor can then choose which section she would like to view. Additionally, if a mentor has a source that is not currently on the CRM, she or he can submit it to the VVCR executive for approval at the bottom of the 'Media Library' page.

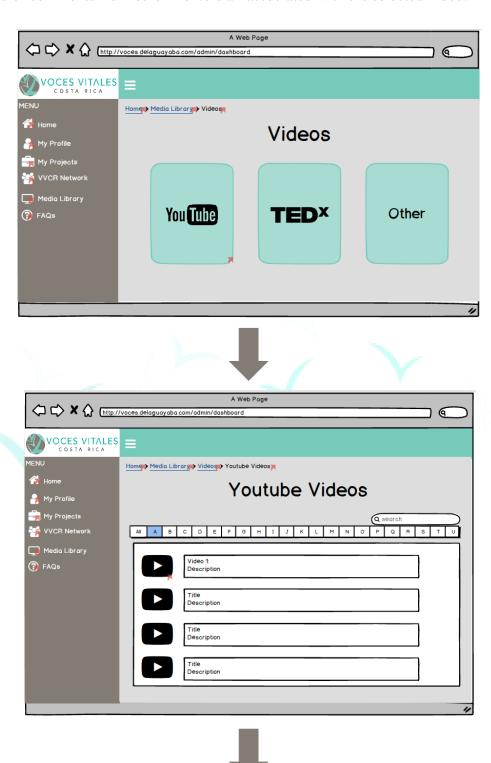


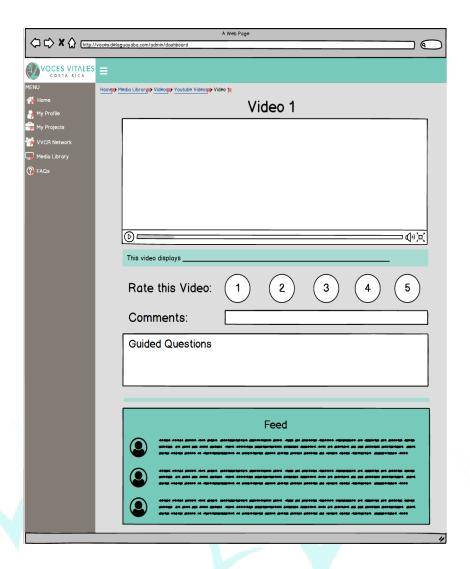
In the middle of the 'Media Library' page, the 'Weekly Spotlight' button brings a mentor to a highlighted resource, chosen by VVCR staff. In our example below, the weekly spotlight shows a video. Here, the mentor can watch the video, optionally rate the video, make comments, and answer guided questions. A feed of comments from other mentors will be displayed at the bottom of the screen.



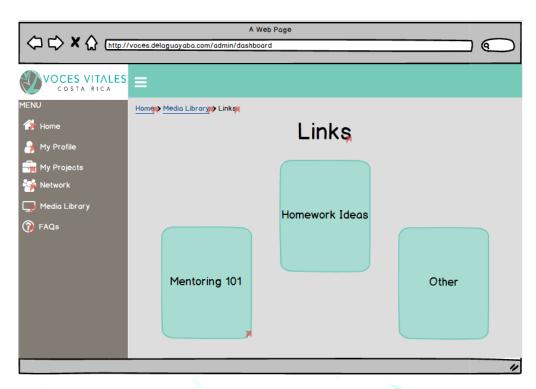
In the top left corner of the Media Library, the 'Videos' button brings a mentor to a database with helpful videos. The videos are currently divided into 'Youtube,' 'TEDTalks,' and 'Other,' but the categories may be modified by the VVCR executives. A mentor can choose between the categories and be brought to a list of videos relating to the category. Following the path to find a youtube video, a mentor will click 'Media Library'  $\rightarrow$  'Videos'  $\rightarrow$  'Youtube Videos'  $\rightarrow$  'Video 1' and be brought to the specific video page. After clicking one of the videos,

similar to the weekly spotlight, a mentor can view, rate, comment, answer guided questions, and read a feed of comments from other mentors all associated with the selected video.

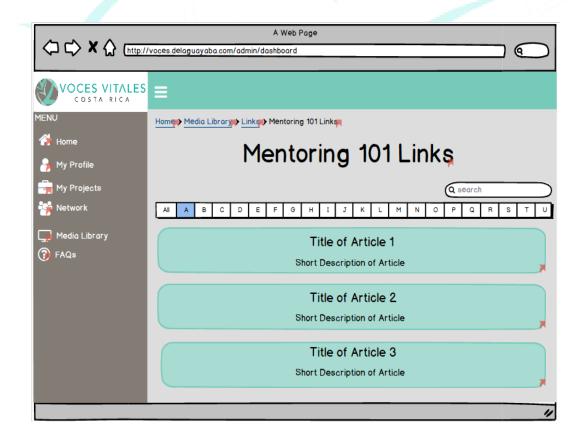




In the top right corner of the Media Library is the 'Links' button which brings a mentor to a page with any helpful links. A mentor will click on a specific category and be brought to an alphabetized list of relative links. The categories in our design are 'Mentoring 101,' 'Homework ideas,' and 'Other,' but are subject to change. An example pathway to a specific link would be 'Media Library'  $\rightarrow$  'Links'  $\rightarrow$  'Mentoring 101'  $\rightarrow$  'Title of Article 1.' When a mentor clicks on a specific link or article, the format is the same as the video but the content is simply a link to an external website. The user can still answer the same questions as the specific video link.











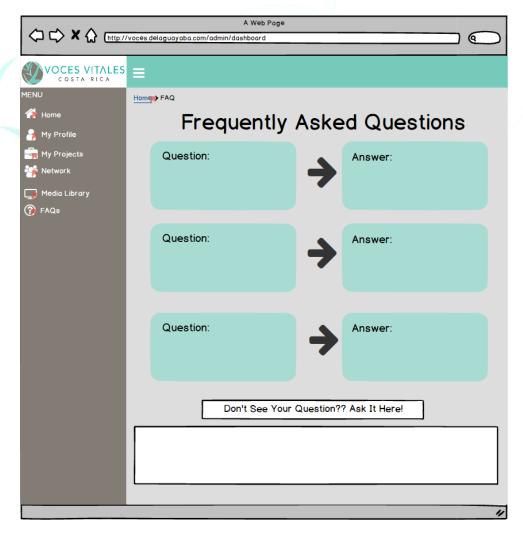
In the bottom left corner of the Media Library is the 'Pictures' button. Upon clicking this button, the mentor can view pictures separated by events and projects.



In the bottom right corner of the Media Library is the 'Social Media' button which leads to external links of all the social media pages associated with VVCR. A mentor can use these links to find the pages VVCR has created to promote Vital Voices including the Facebook page.

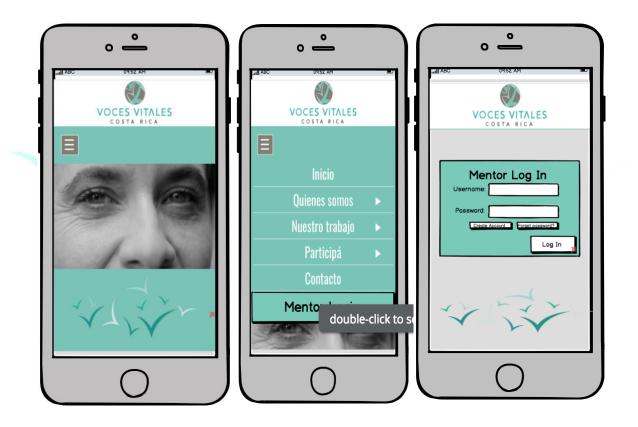
### Accessing the FAQ Page and Submitting a Question:

Located as the last tab in the side menu bar, the 'FAQ' button brings the mentors to a page listing and answering frequently asked questions. If the mentor does not see an answer pertaining to a specific question, she can use the 'Don't See Your Question?? Ask It Here!!' box. The admins will see the question and provide an answer as soon as possible.



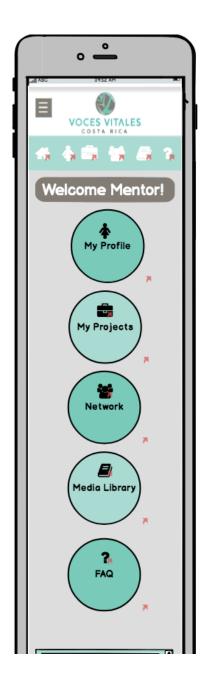
## The CRM - Mentor Mobile View

If a mentor is accessing the Vital Voices Costa Rica CRM from her or his mobile device, she or he will see the mobile view of the VVCR website. If the menu icon with the three lines on the top left of the page is clicked a drop down menu will appear. Clicking mentor login on the bottom of this menu, the mentor is directed to the mentor login page.

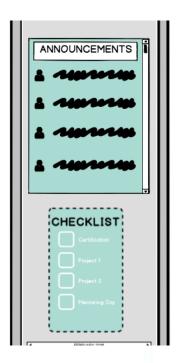


Upon login, the mentor accesses the homepage. At the top of every page within the mobile view of the CRM are six icons. From left to right, these icons are: 'Home,' 'My Profile,' 'My Projects,' 'VVCR Network,' 'Media Library,' and 'FAQ.' Each icon leads to the appropriate page. On the homepage, there are also six buttons labeled 'My Profile,' 'My

Projects,' 'VVCR Network,' 'Media Library,' and 'FAQ' that provide access as well to the appropriate page.



Additionally, on the homepage, there is a mentor checklist, announcements page, and events calendar. This mentor checklist provides each mentor with an update of her or his progress in terms of certification completion and projects. The announcements on the homepage provide the mentor with an updated feed of VVCR information, such as new event sign ups.



The calendar provides mentors with a centralized location of future events. All of these features can be accessed by scrolling down the homepage.

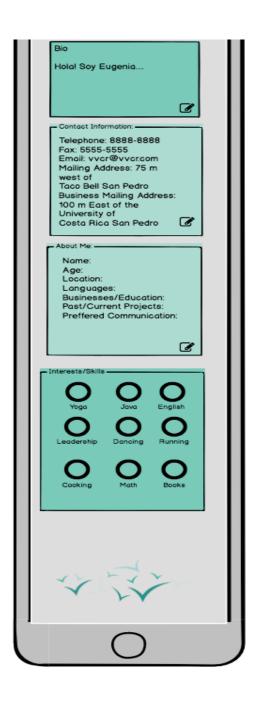


## **Accessing My Profile:**

Mentors can access the 'My Profile' page by selecting the first icon in the top menu bar that looks like a person, or mentors can select the first circle button titled 'My Profile.' At the top of the 'My Profile' page is an editable image of the mentor. Below profile picture is the number of projects a mentor has completed and the number of badges she or he has earned.



Below projects and badges, there is a field for the mentor to input simple information about herself, followed by a field for contact information, and 'About Me' information. The last box on the page, is a section specifying personal interests and skills, sorted by various affinity groups.



#### **Completing Documentation for the Mentoring Process:**

'My Projects' can be accessed through the 'My Profile' page if the mentor clicks on the number of projects completed, or from the top bar icon that looks like a briefcase. The mentor can also access the 'My Projects' page from the homepage if the second circle button titled 'My Projects' is clicked.

On the 'My Projects' page, the mentor will see two more circular buttons. One titled 'One Day Mentoring Events' and one 'Eight Week Mentoring Sessions.'



If the mentor selects 'One Day Mentoring Events' she or he is brought to a general page with buttons that lead to links for the three required forms, 'Commitment Form,' 'Logbook Form,' and 'Feedback Form.'



If the mentor selects 'Eight Week Mentoring Sessions,' she or he is directed to a page with a list of her or his eight week mentoring session projects. These projects appear as circular buttons. If the mentor wants to fill out the individual forms for each mentee/project, she or he should click on the corresponding project button.

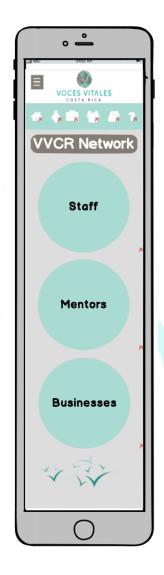
Within that project button, the mentor views a page with a list of necessary forms: 'Photo Waiver,' 'Pre-Leadership Test,' 'Week 1,' 'Week 2,' 'Week 3,' 'Week 4,' 'Week 5,' 'Week 6,' 'Week 7,' 'Week 8,' 'Post-Leadership Test.' When each form is clicked, a new page appears with the specific form which can be filled in and submitted directly on that page.

Zoe's Picture should be here.... Can't insert it.



## **Accessing VVCR Network:**

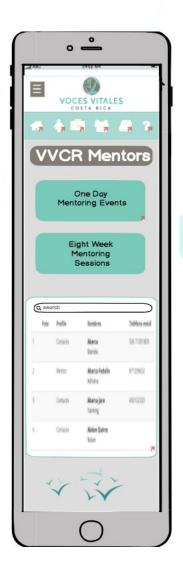
The 'VVCR Network' page can be accessed through the third icon on the top of every page that is an image of three people, or by clicking the third button on the 'Homepage.' On the 'VVCR Network' page, there are three circular buttons descending vertically. These buttons are labeled 'Mentors,' 'Staff,' and 'Businesses,' respectively.



If the mentor clicks on the 'Mentors' page, a page with a search bar at the top is reached. Below this search domain, there are buttons to refine the search and sort mentors into categories by affinity groups, such as 'Projects,' 'Location,' and 'Language.' Below the affinity group buttons is a master list of all mentors, sorted alphabetically.

If the mentor selects any of these buttons, an additional page containing only those mentors in that affinity group appears. For instance, if the mentor selects to sort mentors by projects, she or he is brought to a page with two buttons labeled 'One Day Mentoring Events' and 'Eight Week Mentoring Sessions.' Below the buttons remains the complete list of all mentors. If the mentor selects either 'One Day Mentoring Events' or 'Eight Week Mentoring Sessions' she or he reaches a page with circular buttons for each individual project. Once the mentor clicks on the specific project, for example 'Coca Cola,' she or he is brought to a page with a list of 'Coca Cola' mentors. On this page the mentors can finally click on an individual mentor's name to view the mentor's profile.







On the 'VVCR Network Page,' if the mentor selects 'Staff' she or he is directed to a page titled 'VVCR Staff.' On the staff page, there are four circular buttons descending vertically labeled 'Administration,' 'Executive Team,' 'Trainers,' and 'Funders' which categorize the staff.

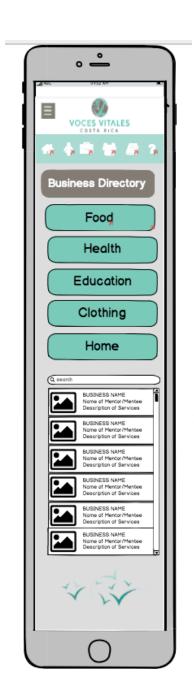
Each button brings the mentor to a new page with each subset of VVCR staff. For instance, if the mentor selects 'Administration,' she or he is brought to a page displaying profile images of the ten administrative VVCR personnel. The mentor can click on any of the images and will be brought to that individual person's profile. Each individual 'Staff Profile' page displays the same information found on the 'My Profile' page.

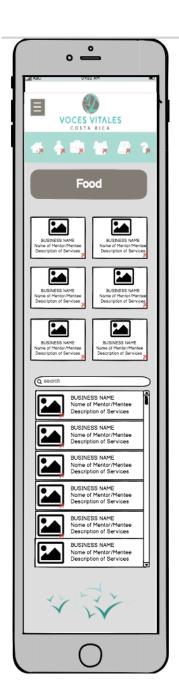






If the mentor clicks to enter the 'VVCR Network' page, she or he can select 'Businesses.' The mentor will then be brought to a page titled 'Business Directory. Descending vertically on the page, are buttons labeled 'Food,' 'Health,' 'Education,' 'Clothing,' and 'Home.'







Below the buttons is a master list of all of the mentors businesses and a search bar to sort alphabetically. If the mentor wants to refine the businesses by category she or he should click on the business type buttons. For instance, 'Food,' 'Health,' 'Education,' 'Clothing,' and 'Home.'

Once the mentor selects one of these buttons, a page with business cards for each business in the category are displayed.

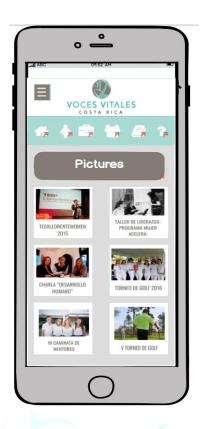
At the bottom of the page, below the business cards, remains a master list of all of the businesses. The mentor can select the business card of the desired business to be brought to a page displaying a business profile. On this page, there is a picture of the business as well as the name, location, business type, and contact information of the establishment.

## **Accessing the Media Library:**

If the mentor selects the fifth icon at the top for 'Media Library' or the fourth button on the home page labeled 'Media Library,' the mentor is brought to the 'Media Library' page. On this page, the mentor will see five circles with five different icons. Starting at the top left icon and going clockwise, the icons are 'Photos,' 'Spotlight,' 'Links,' 'Social Media,' and 'Videos.'



If the mentor selects 'Pictures,' she or he is brought to a page with a list of photos from different VVCR events. When the mentor clicks on the desired folder she or he is directed to the Flickr page, where the photos are housed.



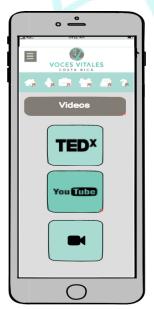
Clicking on the 'Links' page, the mentor is brought to an additional page with help resources, which are categorized by subject.



By clicking on the 'Social Media' button, the mentor reaches a page with icons for each of VVCR's social media platforms. When each platform button is clicked, an external social media page will open in the browser.



Selecting the 'Videos' page directs the mentor to a page with folders of videos categorized by subject. When the mentor clicks on a specific video, a page with only that video will appear.

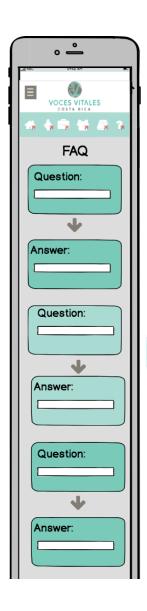


When the mentor selects the star icon for the 'Spotlight' page, they are brought to a page with a link or video.



## **Accessing FAQ:**

If the mentor selects the sixth icon at the top of the homepage labeled for 'FAQ' with a question mark, or the fifth button on the homepage labeled 'FAQ,' the mentor is brought to the FAQ page. On this page the mentor will see commonly asked questions with corresponding answers. On the bottom of the page is a field for mentors to submit other, unanswered, questions.



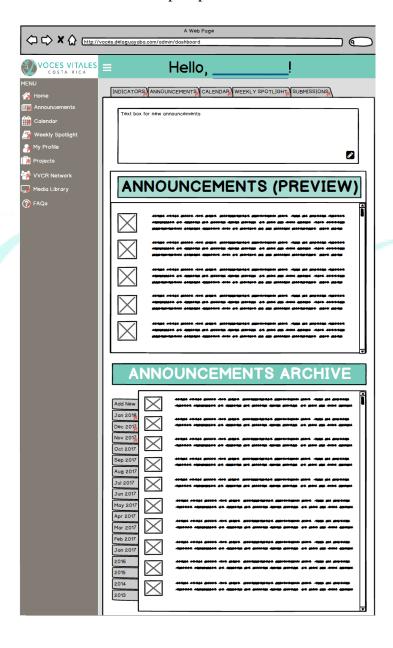
# The CRM - Administrator Desktop View

The current CRM for Vital Voices displays the organization's indicators and houses basic profiles and project information. The newly designed CRM features a homepage with updated indicators categorized by direct impact, indirect impact, and operational impact. The homepage is organized with tabs across the top of the screen for quick access to the pages that require frequent updating. The tabs across the top of the screen include: 'Indicators,' 'Calendar,' 'Spotlight,' and 'Submissions.' A navigation menu is present on the left hand side of the screen for access to all CRM features. Menu items include: 'Home,' 'Announcements,' 'Calendar,' 'Weekly Spotlight,' 'My Profile,' 'Projects,' 'VVCR Network,' 'Media Library,' and 'FAQ.'



## **Updating Announcements:**

To access the announcements page, an executive can click either the second tab across the homepage, or the 'Announcements' button in the menu sidebar. An executive member can post a new announcement by entering text in a text box located at the top of the screen. Immediately below this textbox is a preview window of the mentor view of the written announcement. Here administrators can see past posts from the current month as well.



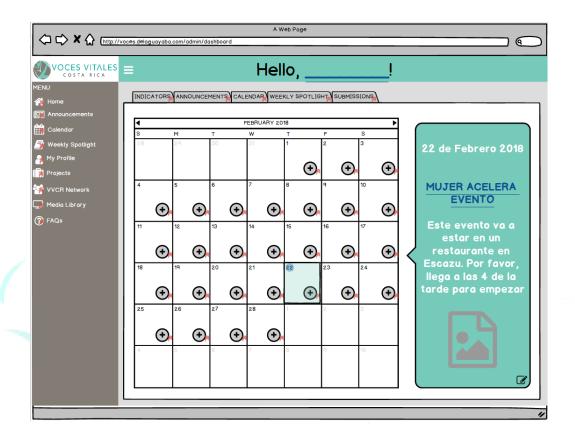
Additionally, shown above at the very bottom of the announcements page, the administrator can access an archive of posts. There are tabs along the left hand side of the archive box that allow the user to switch between different months and years. When a specific month or year is clicked, only the announcements from that month or year will appear.

#### **Calendar Update Page:**

To update the calendar of events for Vital Voices, the administrator can click on the third tab along the top of the homepage or the third tab down on the side menu bar. The calendar page displays a monthly calendar with addition signs in each day. Upon clicking an addition sign, a popup window on the right hand side of the screen is displayed. This window contains text fields labeled for creating events. An executive can add the time, date, name of the event, location, and an image.

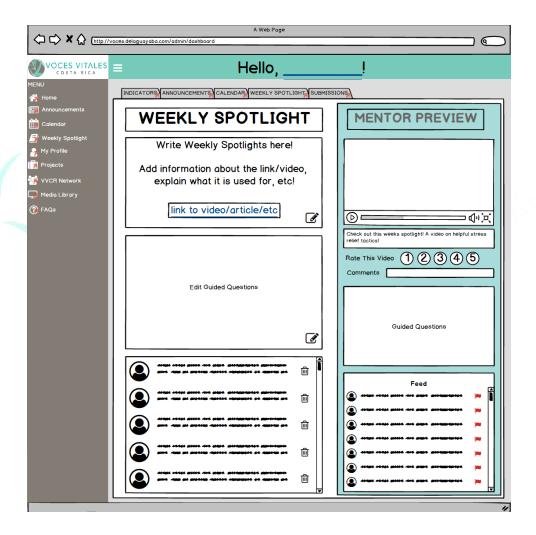


Shown below, if an event already exists the date on the calendar is highlighted in light green. The user can hover the mouse over the designated day and the same popup window will appear with existing event details.



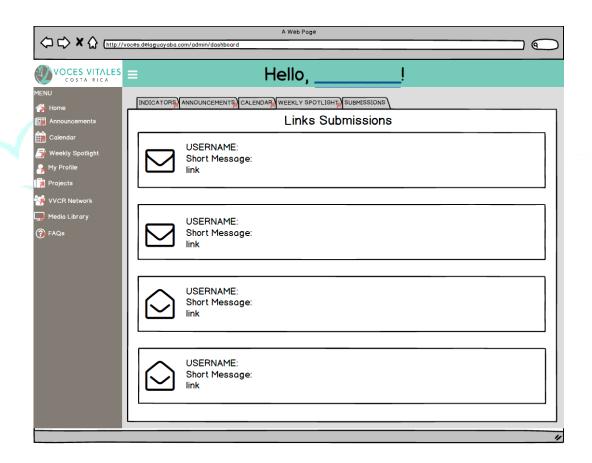
#### Weekly Spotlight Update Page:

The weekly spotlight is a collaborative mentor space. The administrative view of the weekly spotlight is split into two screens. The left-hand side allows executives to choose a media to highlight, write guided questions, and view submissions of comments or guided questions from mentors. The admin has the ability to delete any comment they do not deem appropriate or relevant. The right-hand side is simply a preview to what the mentor sees.

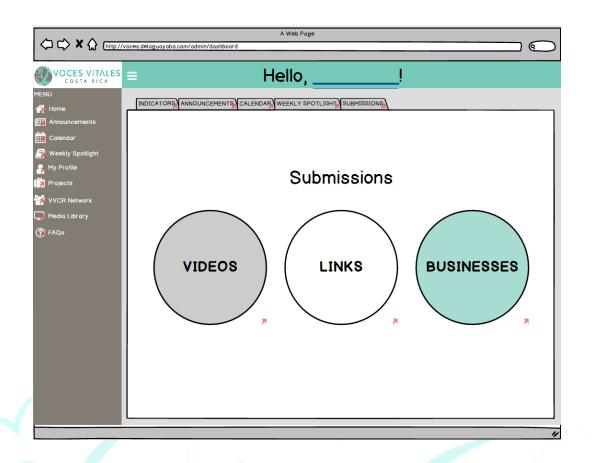


#### **Viewing Mentor Submissions:**

Upon clicking the 'Submissions' tab on the homepage, an admin can choose to view videos, links or business submissions sent in by a mentor. Upon clicking into one of the sections, an admin views the submissions in an inbox format. The admin can then choose to add the media into the library. Additionally, the mentor can tell if the submission has been viewed or not by looking to see if the envelope on the left-hand side is open or closed. Shown below is the pathway taken to view submitted links.







#### **Viewing Personal Profiles:**

Similar to the mentor view, administrators have personal profiles. An admin can access the personal profile by clicking the 'My Profile' tab on the sidebar menu. The profile is identical to the one in the mentor view.

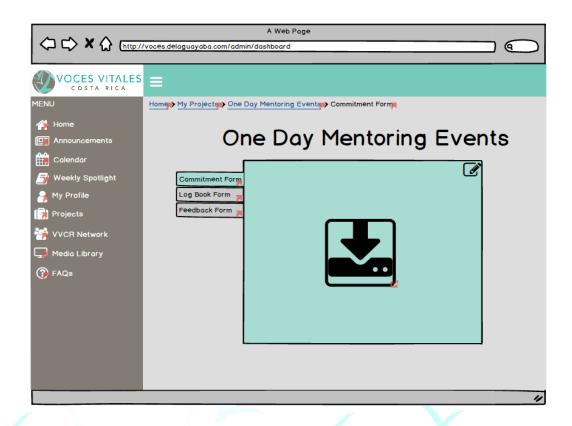


#### **Accessing Projects/Documentation:**

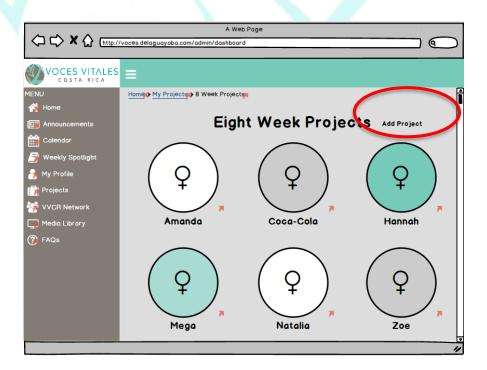
Upon clicking the 'Projects,' tab on the sidebar menu, four buttons are displayed: 'One Day Mentoring Events,' 'Eight Week Mentoring Sessions,' 'Documentation Submission,' and 'Documentation Archive.'



Upon clicking 'One Day Mentoring Events,' an administrator can view and edit the forms attached. The CRM tracks changes by dates and automatically adds the changes to a documentation archive.

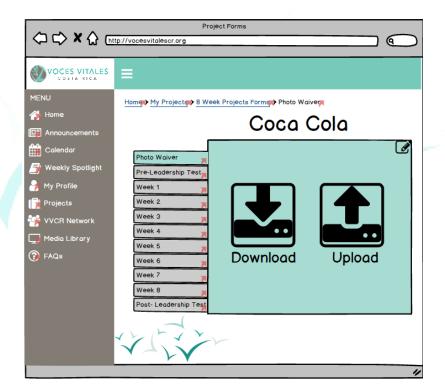


Upon clicking 'Eight Week Mentoring Sessions,' all of the active projects are visible. The administrator can add a project by clicking the 'Add Project' button at the top right corner.



The admin can then choose a specific project to view and edit the associated forms by clicking the edit button at the top right corner of the forms table.

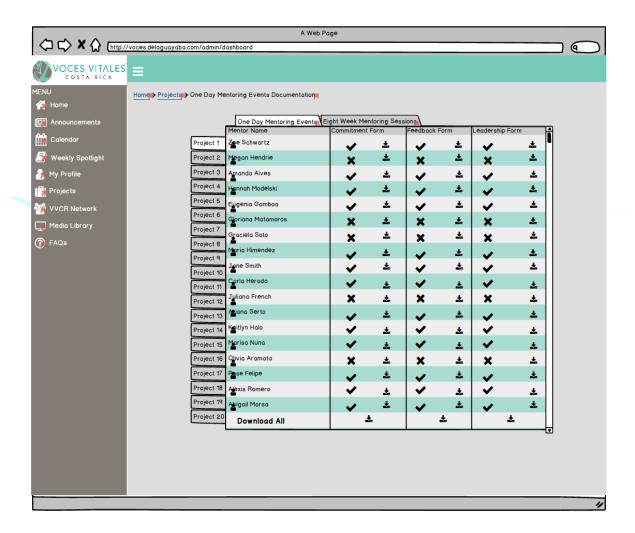
On the 'My Projects' page, by selecting the 'Documentation Submissions' button an admin will be brought to a page containing all of the submitted forms separated by project type, and title. On the top of the table there are two tabs, 'One Day Mentoring Events' and 'Eight Week Mentoring Sessions.' If 'One Day Mentoring Events' is selected, all the one-day mentoring events will be listed in tabs on the left-hand side of the table. The admin can then select the 'One Day Mentoring Events' project she is looking. Listed in the column besides the project titles is the name of each mentor within the project.



Listed at the top underneath the 'One Day Mentoring Events' and 'Eight Week Mentoring Sessions' tabs are columns for each form. The admin can easily view which forms have and have not been submitted for each mentor by looking to see if there is a check or an X in the corresponding row and column. A check indicates completion where an X depicts

incompletion. Furthermore, the checks and X's will be color coded with green for checks and red for X's. Every grid block has a download button where the admin can access the exact form the mentor submitted. At the bottom of each column is a download all button that allows an admin to download every mentor's form.

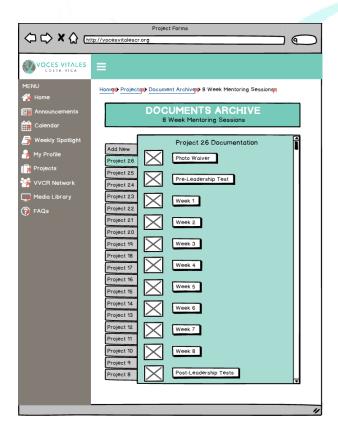
The 'Eight Week Mentor Submissions' tab will have the same format as the 'One Day Mentoring Events' with the corresponding documents.



From the 'Projects' page, upon clicking 'Documentation Archive' an admin is further prompted to pick either 'One Day Mentoring Events,' or 'Eight Week Mentoring Session.'



Upon clicking either, the administrator can view all of the documents associated with each project. Shown below, for example, is the 'Eight Week Mentoring Sessions' archive. A list of projects in order of descending date is shown on the left-hand side of the table. Each form



associated with a specific project is shown to the right. This will allow admins to keep track of changes of documents. The format for 'One Day Mentoring Events' is the same.

#### **Searching for Other Mentors and VVCR Staff:**

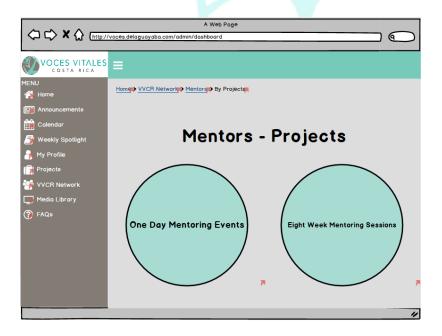
On the left side of the administrator platform, the 'VVCR Network' tab has three buttons: 'Staff,' 'Mentors,' and 'Business Directory.' Upon clicking the Staff page, the admin can access a list of other VVCR executives with pictures and a job title as seen on the public website. The admin can then click on an individual profile to view.



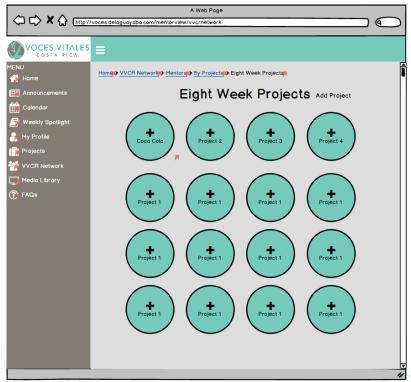
Upon clicking the 'Mentors' option within the 'VVCR Network' tab, administrators can access a complete list of all VVCR mentors. The mentors appear alphabetically in a list at the bottom of the screen. Further refinement of the list can be achieved by clicking affinity group buttons at the top of the screen. Affinity groups include categories such as 'Projects' and 'Location' which are predetermined by the staff at VVCR.



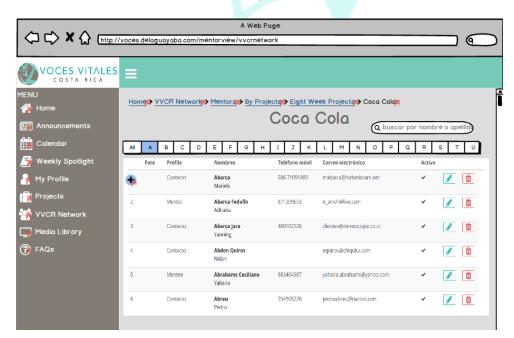
If the administrator clicks on one of these groups, the group is further refined. Eventually an admin will come to a list of mentors within a specific group. They can then click on a specific mentor to view the profile. An example pathway is provided below: 'Projects'  $\rightarrow$  'Eight Week Projects'  $\rightarrow$  'Coca-Cola.' The administrator would then select a name to view a specific profile.



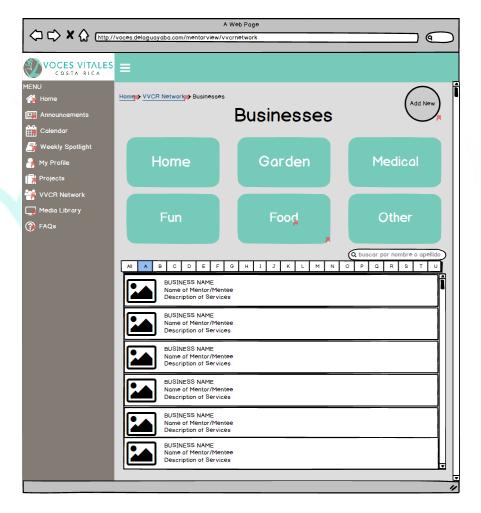




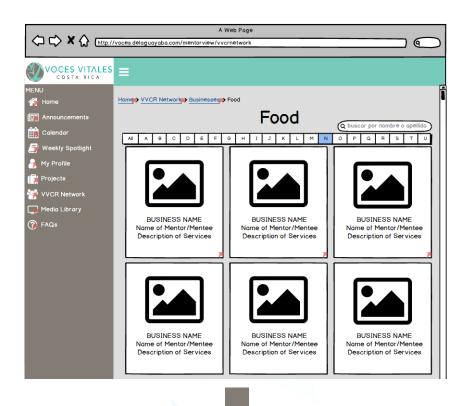


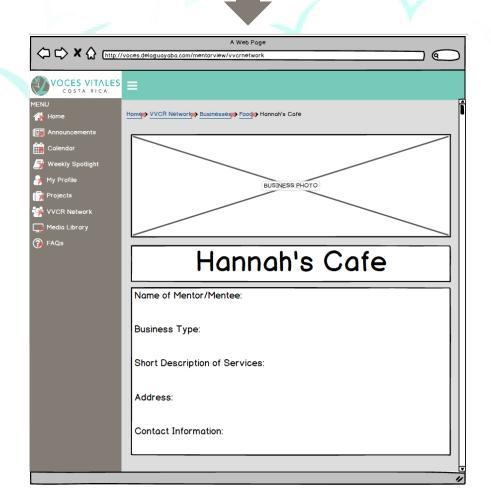


Upon clicking the 'Businesses' button from the 'VVCR Network' tab, the administrator can access a list of businesses in alphabetical order. Similar to the Mentor categorization, different subjects of businesses are featured as buttons at the top of the page. If a user clicks on a type of business, a shorter list of the designated subcategory appears on a new page with bigger images of the businesses and a preview of general information for the business. If the admin then clicks on a specific business, they will be brought to a page that serves as a profile for each company, listing its contact information, list of services, address ADD. This process and pages are the same as the mentor view, allowing admins to see what mentors are accomplishing in the professional world. The pathway to reach an individual business is shown below.

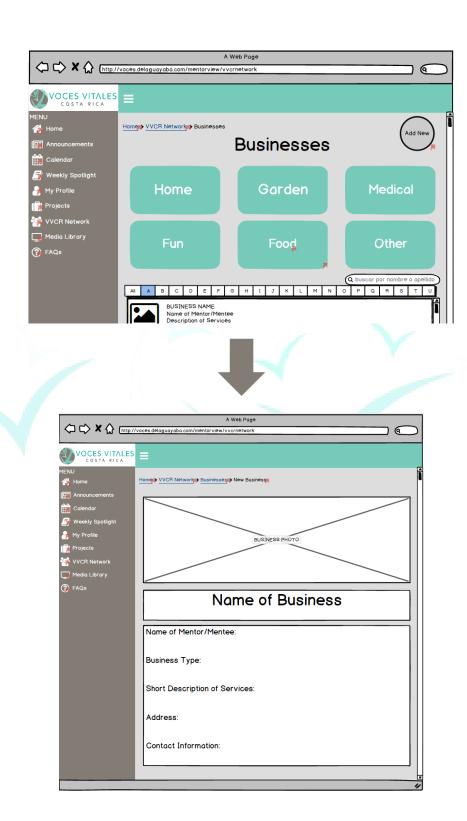








The administrator view of this feature allows for the staff to add any new businesses through a simple button in the top right corner of the page. This will then lead to a blank copy of the business profile that the staff can fill out for the new organization to add into the database.

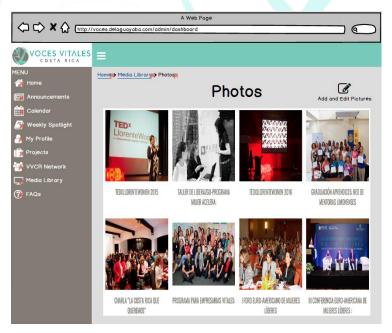


#### **Accessing the Media Library:**

The Media Library can be accessed by clicking the 'Media Library' tab in the sidebar menu. Upon clicking, four large circles appear that lead to different forms of media: 'Pictures,' 'Links,' 'Videos,' and 'Social Media.'



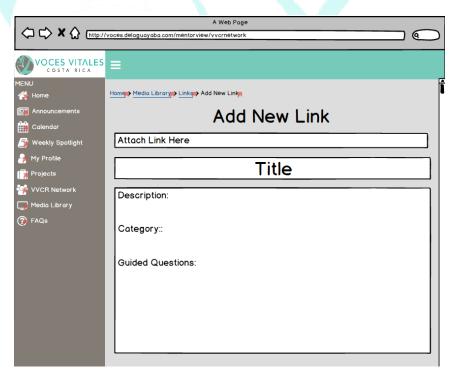
Upon clicking 'Pictures,' the administrator can view, add, and edit pictures taken at events. The pictures are categorized in groups with titles shown below.



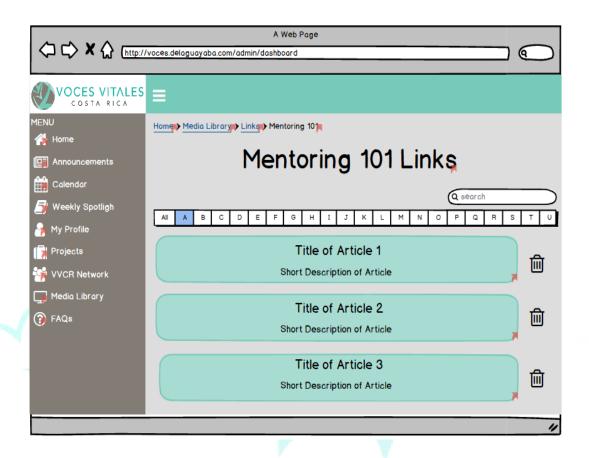
Upon clicking 'Links,' an admin can add new links or edit the current affinity groups. The current affinity groups listed are 'Mentoring 101,' 'Homework Ideas,' and 'Other.'



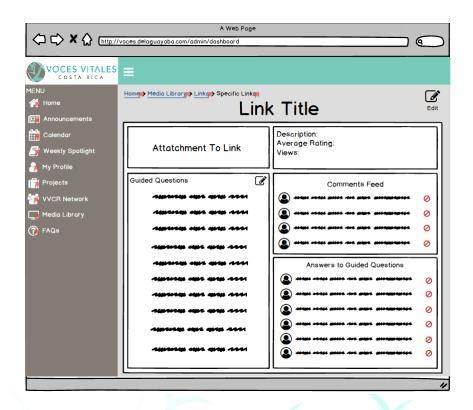
By clicking the button that says 'Add Link,' an admin will be brought to the following page to add the link attachment, title, a description, the category where the link will reside, and guided questions.



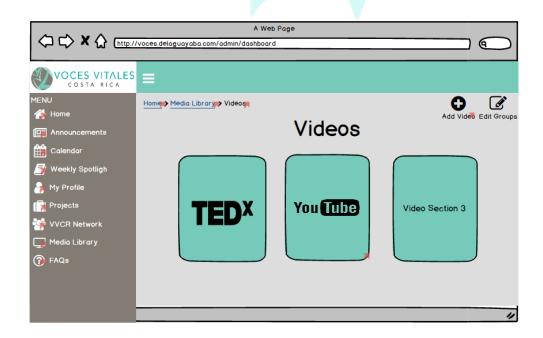
Upon clicking into a subject, an admin will be able to see a list of all the relative link and have the ability to delete any link they wish to. Administrators can also search for links using the search bar or by alphabetical order.



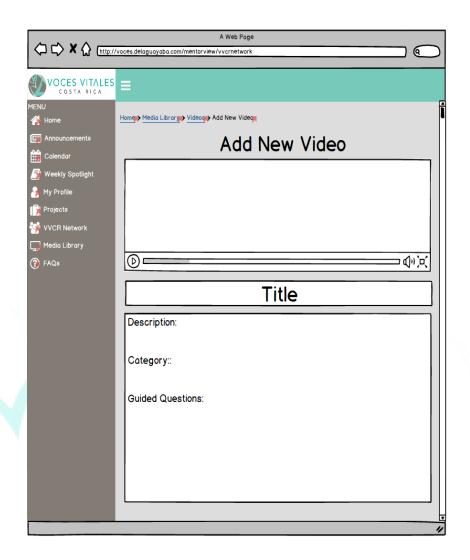
Upon clicking a specific link, an admin can edit the guided questions, title and description, view and monitor submissions from comments and guided questions, and see the average rating and view count.



The video section is very similar to that of the links. An administrator can add a video or edit the affinity groups by clicking the buttons in the top right corner. The current affinity groups are 'TedTalks,' 'Youtube,' and 'Other.' The administrator can directly edit the affinity groups on the page and be brought to another page to add the video as with the links.



The add new video page is identical to the links page with the title of 'Add New Video' instead of 'Add New Link.'

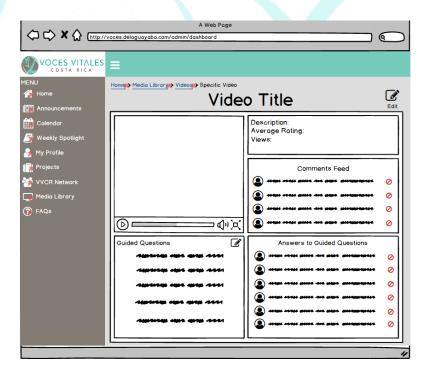


The process to view a specific video is the same as the links with slightly different visuals. For example, upon clicking into 'Youube Videos,' the following is shown.

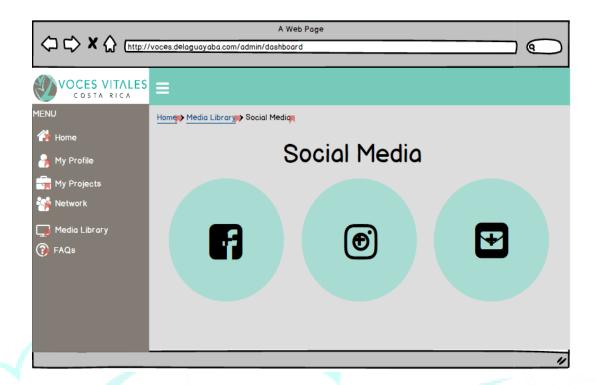
Administrator also can search for a video through the search bar, or by alphabetical order.



The administrator can see how many views a video has and delete any videos they wish too. Upon clicking a specific video, an administrator can again edit the title, description, and guided questions, see the average rating and number of views, and monitor comments and answers to guided questions.

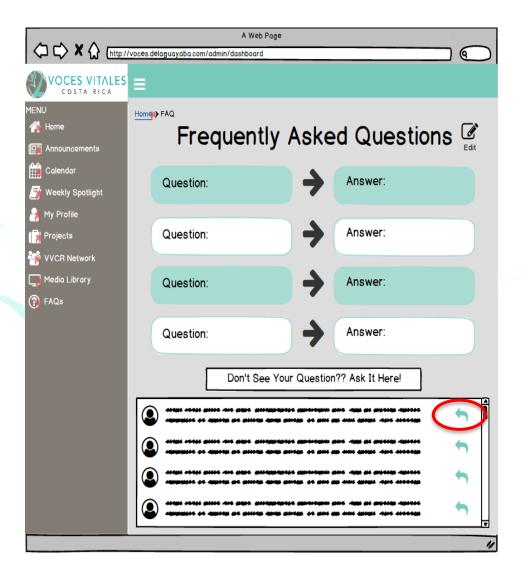


Lastly, upon clicking the social media page, an administrator can edit the links to the social media pages.



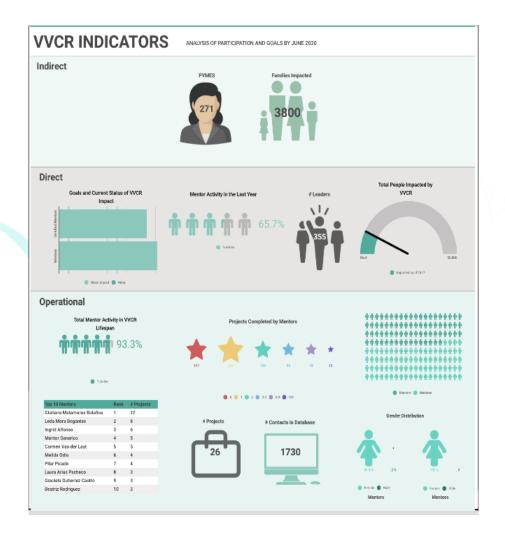
#### Accessing and Responding to FAQ:

The final feature listed on the navigation bar of the homepage is the 'FAQ' Section. When clicked, this button takes the user to a page organized in a question and answer format. The questions are listed on the left and the answers are given on the right. At the bottom of the page, an admin can view and answer questions submitted by mentors by clicking the blue arrow.



#### **Updating Indicators:**

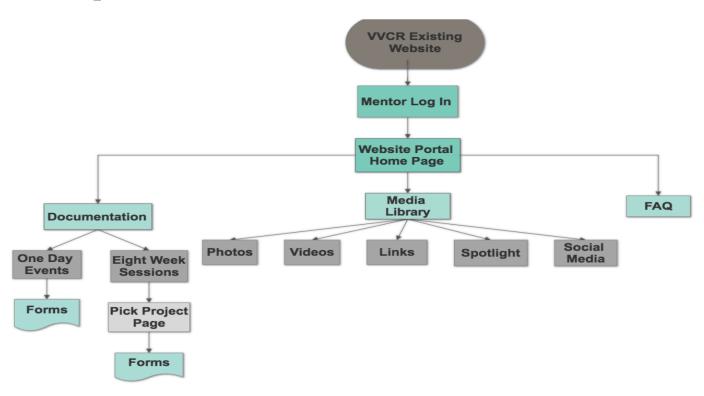
The indicators on the homepage are directly programmed to depict information in an excel sheet. To edit the indicators, click the edit button in the top right corner of the screen. Upon clicking the edit button, you will then be directed to the excel sheet that contains the indicator data. Here administrators can edit fields as in an excel table. Table changes will automatically update the visual indicators.



# Section 2:

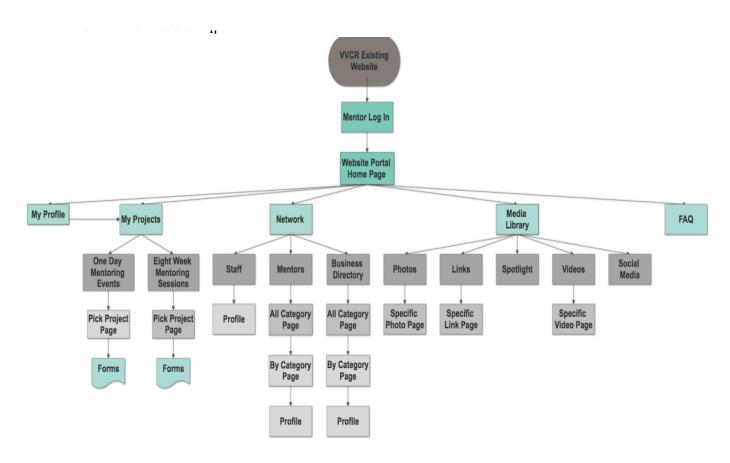
Platform Navigation for De La Guayaba In addition to the Balsamiq Mockups, for De La Guayaba, we provided the following three sitemaps to aid in their development process. Each sitemap starts at the existing VVCR website and leads De La Guayaba and the user through the possible paths to each page.

## Website Sitemap:



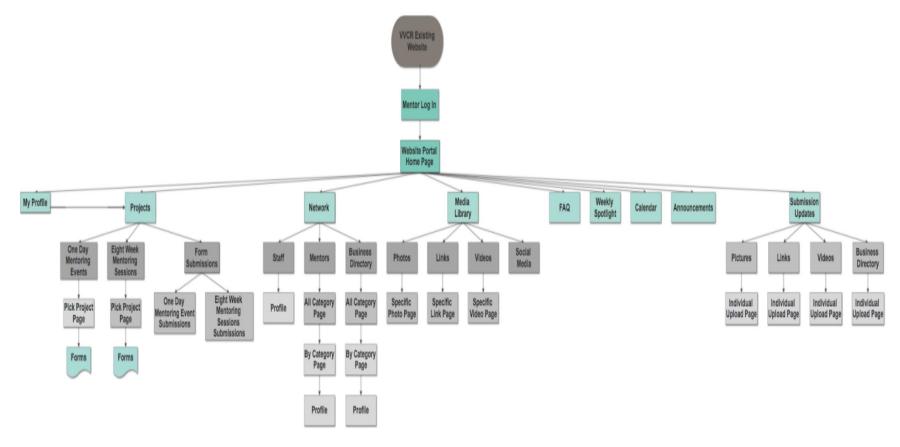
The sitemap starts at the existing VVR Website and leads to the 'Mentor Log In' and then 'Website Portal Home Page.' It then branches off to 'Documentation,' 'Media Library,' and FAQ.' The above sitemap shows the pathways below these three main pages.

### **CRM Mentor View Sitemap:**



The sitemap starts at the existing VVR Website and leads to the 'Mentor Log In' and then 'Website Portal Home Page.' It then branches off to 'My Profile,' 'My Projects,' 'VVCR Network,' 'Media Library,' and 'FAQ.' The above sitemap shows the pathways below these five main pages.

## **CRM Admin View Sitemap:**



The sitemap starts at the existing VVR Website and leads to the 'Mentor Log In' and then 'Website Portal Home Page.' It then branches off to 'My Profile,' 'My Projects,' 'VVCR Network,' 'Media Library,' 'FAQ,' 'Spotlight,' 'Calendar,' 'Announcements,' and 'Submission Updates.' The above sitemap shows the pathways below these nine main pages.

## Section 3:

Recommendations to Vital Voices Administrators and Executive Board

We made the following recommendations to encourage platform integration, social media promotion, and efficient platform coding. To prevent any reluctance to using the new systems, VVCR must provide proper training to mentors on how to navigate the systems. By guiding the mentors through the new systems to create comfortability using them, mentors will be less likely to reject the platforms. Furthermore, we advise that mentors create a personal username and password during mentor training. By creating a username and password during training, all mentors will be introduced and entered into the new system. Additionally, with help nearby, mentors can login and explore the new CRM, learning to pilot the system, and asking questions along the way. This will help to prevent questions later on about system navigation, saving executives time.

To further prevent reluctance to using the new systems, we suggest that VVCR raise awareness and build excitement through a launch campaign. This campaign should emphasize to the mentors that the new system is created for them to make their mentoring experience more convenient and advertise that the systems provide additional features to expand their opportunities within VVCR. Launching a campaign to promote the new systems will encourage the success of the systems by fostering mentor enthusiasm.

To maintain and promote VVCR's social media pages, we advise VVCR to require mentors to like the Mentor Facebook page. During our field work, mentors made several requests for a discussion board to serve as a collaborative space for mentors to discuss mentoring techniques and practices. However, this feature already exists on the Mentor Facebook page. Mentors have the ability to post to the group on the feed, which administrators must approve before the posts become viewable to everyone. Stressing the use of the mentor facebook page will not only get mentors involved, but will also promote VVCR's social media.

Finally, if funds are available we would highly encourage VVCR to increase the amount of contact with De La Guayaba until the central CRM is built. If De La Guayaba can devote more hours per week to code the system, the new CRM will be finished much faster. Moreover, if VVCR invests more money in the initial building stage, future maintenance costs should be minimal as most features and content can be managed by VVCR administrators. The faster this system can be integrated, the more efficient both the administrative and mentoring processes will become - maximizing the organization's overall influence and helping VVCR reach its goal of impacting fifty thousand people by June of 2020.