

Meet Your Support Team: Intake Request Process Review and Best Practices

Thursday, June 20 at 1 p.m. CDT

Northwestern

Meet the Staff



Lauren Lakomek
Project Manager



Kristin Jacobson
Assistant Director



Niah Tobarri
Assistant Director

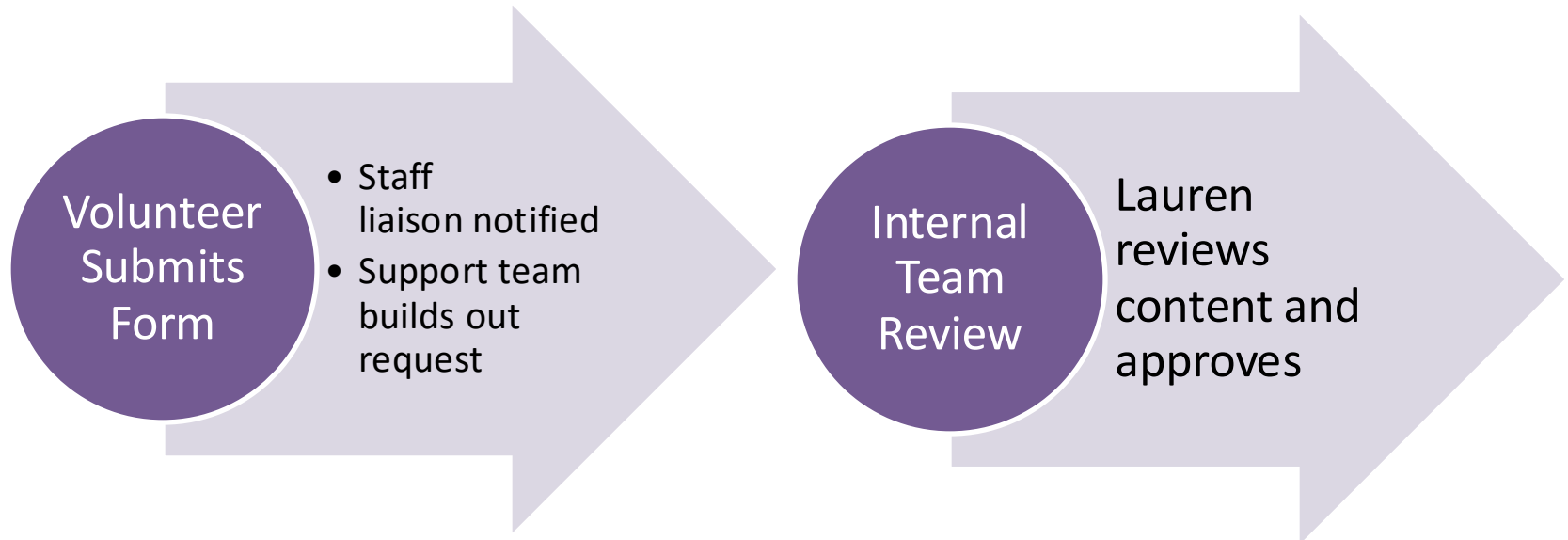
Agenda

- What we're excited about
- Our process
- Intake form overview
- Best practices for submissions
- Myth busting
- Q&A
- Takeaways

What we're excited about

- Being of service
 - Working in partnership with communication experts; helping clubs with newly identified leadership
- Opportunities for synergy
- New suite of tools
- Getting to work with volunteers
 - We didn't know what to expect, but you rock!

The Process



The support team will reach out to club for clarification, or additional content requests.

Requests are typically prioritized by event date.

Our goal is to get the content into the review phase within three business days.

The Process



Requests must be approved by both NAA staff and the volunteers before emails are sent/events are published.

When we send you previews, we'll also share the intended send dates.

alumni.northwestern.edu/reports

"We're Expecting You" emails are being sent manually right now, but these will be automated in the future.

Intake Form Overview

The form is dynamic with logic to show/hide relevant fields

- Is this a new project request, or an update to an existing one?
 - Existing:
 - Tell us more about what changes are needed
 - New: Email
 - Letters/announcement, event digest email, special appeal

Intake Form Overview

- New: Event with Email Package
 - If you request an event registration page build, we'll also create:
 - 2 invitation emails
 - A day before “we’re expecting you” / “know before you go” email
 - Demo: alumni.northwestern.edu/request

Best Practices for Submissions

DO...

Appoint a representative from your club who will be responsible for compiling and submitting project requests.

...OTHERWISE

A lack of coordination leads to delays.



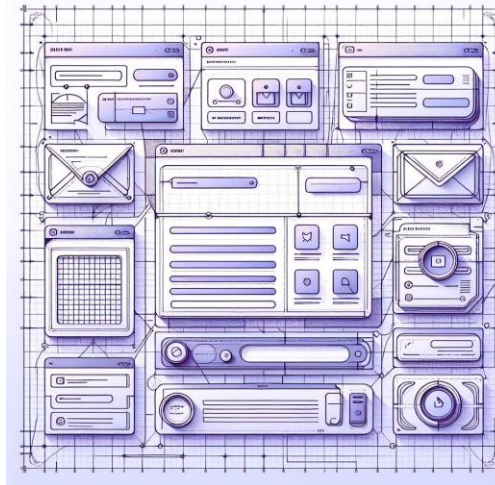
Best Practices for Submissions

DO...

Draft your email/event in a word document first, then upload that file to the project request form.

...OTHERWISE

We may put together something that doesn't match your vision.



Best Practices for Submissions

DO...

Provide as much detail as possible. Even if it's a "save the date", more is more!

...OTHERWISE

We might not have enough information to populate your email, confirmation messages, or event listing.

Best Practices for Submissions

DO...

Proofread your submission verifying that dates, addresses, and capacity limits are correct.

...OTHERWISE

Mistakes happen, but we'd like to avoid easy mistakes when possible!



Best Practices for Submissions

DO...

Use graphics to provide visual interest, not to convey key information.



A flyer is not suitable for email.

...OTHERWISE

You're preventing those with visual impairments from being able to understand your content. Your content will also perform poorly on mobile devices.

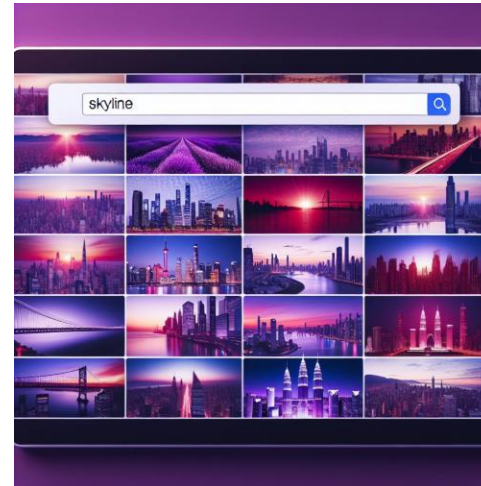
Best Practices for Submissions

DO...

Use photos that were taken by the club or provided by the venue/program hosts. Alternatively, ask the support team to help source royalty free photos.

...OTHERWISE

Lawsuits are expensive!



Best Practices for Submissions

DO...

Request the placement of QR codes strategically.

...OTHERWISE

Your communications will look less technologically adept.



MythBusters!

Myth

- When you consider revisions and approvals, you'll never be able to get an email sent out in less than four days.
- Requests for special announcements like for the NCAA tournament need to follow the four-day notice rule.

...Busted

- We anticipate with new software platforms our turnaround times will be even faster over time
- We are just as excited as you to get the message out about playoff and other emerging, fast events. Stay tuned for information about rapid response emails!

MythBusters!

Myth

- Staff will edit our communications so we all look and sound the same.
- Volunteers no longer have control over their communications.

...Busted

Our sincerest goal is to make every aspect of sending out emails and event registrations easier for the NAA clubs, so you can focus on the most important aspects of your volunteer work—fostering meaningful connections in your hometown, without being bogged down by technical demands.

Questions?

Takeaways

- ONVolunteers@northwestern.edu
 - After hours/emergency requests
- Agency Hours
 - Central time, Monday through Friday, from 8:30 a.m. to 5 p.m.
 - We follow the University's published holiday schedule
- Your staff liaison is your strategy partner
- [Expectations](#)