



Automated Recruitment

....and telemarketing

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Introduction

- Erik Hommel
- CiviCooP
- Amnesty International Vlaanderen



Meet the players

Internal:

- 3 data analysts
- 1 team lead / business process analyst
- Around 30-40 employees and volunteers.

CiviCRM since 2012, support since 2013 from CiviCooP and Systopia.

Gear:

- CiviCRM 5.37.2 (upgrading as we speak)
- Drupal 7.61 (upgrading as we speak)
- Website and CiviCRM server separate
- CiviProxy
- Sparkpost for mailing



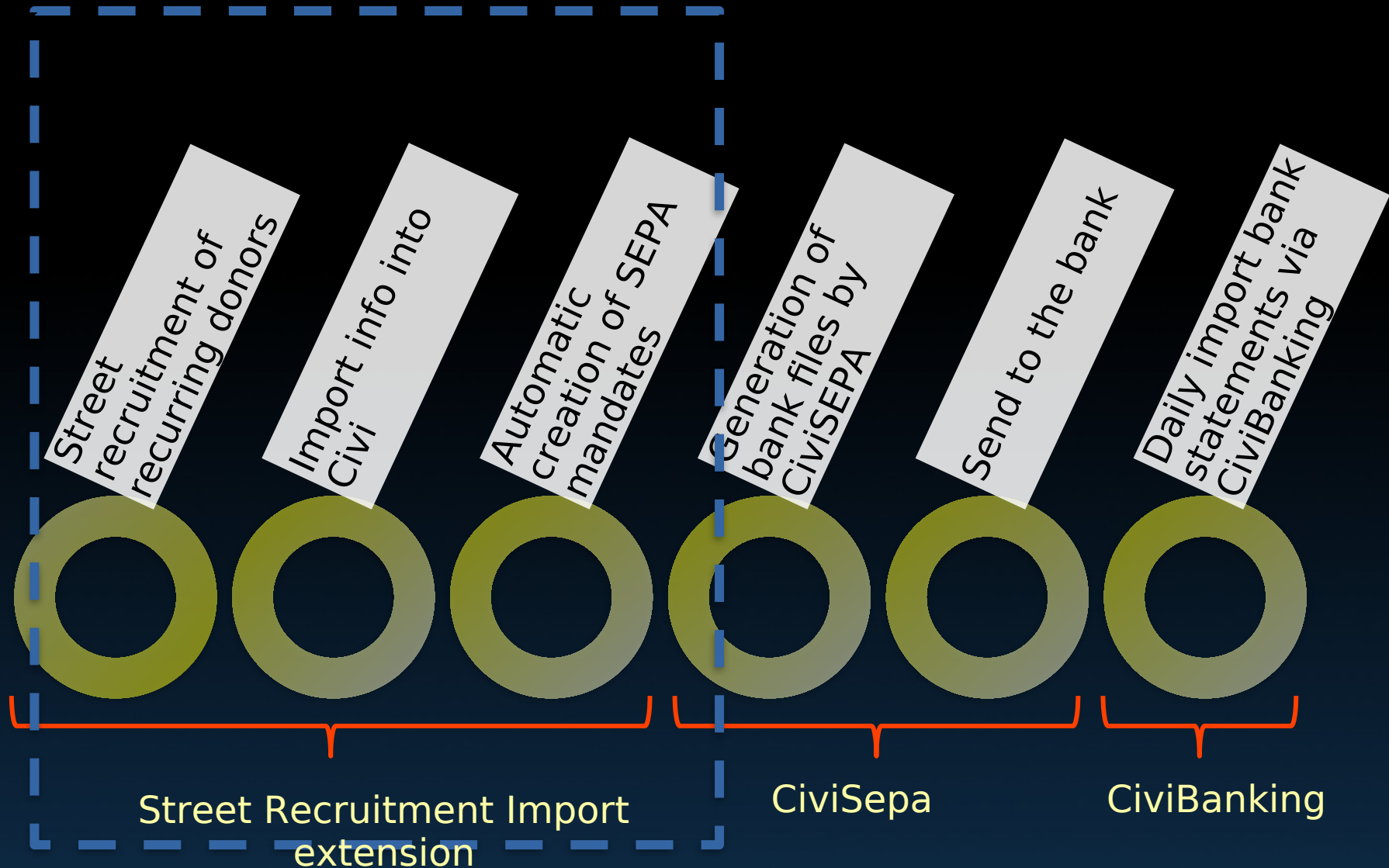


CiviCRM used for

- Contacts
- Contributions (using CiviSepa and CiviBanking)
- Events and participants
- Free memberships
- Campaigns
- Activities of all sorts
- Mailings with Mosaico
- Data from website and external services using CMRF
- Street recruitment and telemarketing import
- Selections for direct mailing and telemarketing



Street recruitment - the full story





Issues that led to 2.0

- Each agency delivers a .csv file but use their own (sometimes inconsistent) mapping
- Each file is uploaded to a specific file server where they need to be manually loaded
- Error handling and fixing is tedious and manual
- Setting up a new agency needs a lot of support from the ICT team
- We use a data mining tool to transform the imported data into the acceptable format but we are discontinuing the usage of that tool





What we do now

- Agencies have to have an API so we can pull data
- We pull the data and store it quickly in the log
- Processing is done in batches using a scheduled job
- Actual processing is done with a Form Processor
- Business manage the actual mapping
- Error fixing can be done from the log
- Less errors, less manual labor, more consistency
- Adding new agency is much and much quicker



Inside CiviCRM

- API3 entity & action to receive data using a scheduled job and store in specific log table
- Potential settings for each recruiting organization
- Credentials and parameters to access data
- Mapping of Prefix, Campaign, Cycle Days and fields mapped based on Form Processor inputs
- Processing from log tables, independent from active connection with recruiting organization
- Form Processor for actual processing
- Creates contacts, activities, SEPA mandates, group membership etc.
- Logging of actions, possibility to change data and retry in case of errors



Telemarketing

- Currently we still upload CSV files from telemarketing organizations
- We are working on importing in the same way as you have just heard and seen
- Expected to be completed during Q3



Extension

- The Street Recruitment Import extension can be found on GitLab
- <https://lab.civCRM.org/partners/civicoop/aivl/streetrecruitmentimport/>
- Soon to be renamed to Fundraising Import extension
- Specific to Amnesty International Vlaanderen
- But fairly easily adapted to new organizations
- Vluchtelingenwerk Vlaanderen is going to use it too very soon