Process Queues Serve Team Leader Perspective

*This assumes that the queue and it's automations are properly built beforehand. This is management only.

Instructions on the Queue: (These are not present on the app)
When you are notified of a new volunteer, you are expected to follow up with the individual and see if they are a good match for your team.
1. While "working" on connecting with the individual, mark their status as in process.
2. Once finalized, mark them as done.
3. You will have the option to do nothing (on the website) OR add them to your team.

OR, if you have two positions:

When you are notified of a new volunteer, you are expected to follow up with the individual and see if they are a good match for your team.
1. While "working" on connecting with the individual, mark their status as in process.
2. Once finalized, mark them as done.
3. You will have the option to do nothing (on the website) OR add them to your team.
3a. Adding them to your team will add them to your A position. If you would like to add them instead to your B position, please uncheck the optional positions box and mark as done. You may then add the individual manually to your Teams & Positions tab (see the "Manage Members" instruction sheet) in the other position. If you would like the individual to be added to both positions, leave the optional positions box checked before marking done and proceed to add as instructed.

From the LEAD. App

Manage Persons:
1. Go to Queues.
2. Review the Unassigned category.
3. Click on the individual, then click take. Here you can make a Note, Mark as Done (finishing their active time in the queue, will display the automated actions that occur with "done"), call/text/email them, as well as retrieve directions to their address in the system.
4. While on the Individual, you can also click the three white dots in the top right corner to remove them (only when added in error), change their due date, change their status (in process, waiting, etc.), or view their full profile (per your privileges).
5. When you are finished with the individual, mark as done if you would like to add them to your team and click Save in the top right corner. If an event arises that you would not like to add the person to your team, please switch to the website version where you will have the option to uncheck the automation when marking as done.

Add a Note:
1. In the queue, click the individual.
2. Click on Notes.
3. In the top right corner, hit the white +.

4. Add the note and select (in most cases) Share with: Process Admins, Process Managers, and Queue Managers.
5. Click Save in the top right corner.

Communication:

1. In the queue, you may send an email by clicking on the person's name. At the next page, click the blue email icon. From there it uses the email app on your phone to send the email.
2. In the queue, you may find their phone number by clicking on the person's name. At the next page, click the blue phone icon. From there it uses the calling app on your phone to place the call.
3. In the queue, you may find their phone number to text them by clicking on the person's name. At the next page, click the blue speech icon. From there it uses the messaging app on your phone to text.

From the Website:

Manage Persons:

1. Click on People, then the Processes tab.
2. Managed by Me shows the Processes & Queues in your purview. Assigned to Me shows the individuals assigned to you and the queue they are associated with. Click on the queue you are working on.
3. Click the checkbox to accept individuals.
4. Click on the individual. Here you can make a Note, view their history of process queues, any forms they've filled out that are automated to this process, GFC involvement, family members, contact info, or change statuses and dates.
5. When you are finished with the individual, mark as done in the black box to the right. Here you will see an actions box that will allow you to automatically add the person to your serve team (in Teams & Positions). If an event arises that you would not like to add the person to your team, when you mark as done please UNCHECK the box that would have added them to the position. Click Save.

Add a Note:

1. In the queue, click the individual.
2. On the Notes tab, add the note and select Who can see this note about (name)? Process queue managers.
3. Click Add this note.

Communication:

1. In the queue, you may send an email by clicking on the person's name. At the next page, under their name is a blue hyperlinked "Send Email." From there you can add the subject, message body, and attach files if desired. Click Send.

2. In the queue, you may find their phone number by clicking on the person's name. Phone is located under the email hyperlink.

Tips:

- Every queue is a little different. You will want to be familiar with the automations associated with your particular process queue when you mark a person as "done" as emails could be sent immediately, etc. Knowing the features of the queue itself is integral to process queue management success.
- To mark a person as "done" and NOT add them to your team, you must use the website version of myGFC.
- Other aspects of using Schedules in the LEAD. app can be found HERE. Also, a FAQ section for Schedules can be found HERE.