

REQUIRED USE OF THE INQUIRY SYSTEM

As an organization that emphasizes customer services, YFU must maintain inquiries, with their full history, in a single database. This approach allows us to document and manage these relationships appropriately based on previous interactions. **Thus the Inquiry System is the exclusive tool that must be utilized to document the inflow and communications, attempted and actual, with all inquiries.**

News!
All staff will now use the Inquiry System for all inquiry management.

NEW FEATURE: HOTNESS SCORE

Person Name	Last Updated	Category - Status - # Updates	Score
Sort by name	Sort by last update	Sort by follow up date	Sort by Score
Farrar, Siena	03/26/14	HF - Left Message or Talked to Minor after 08/06/12 - 5	2000
Housman, Amy	03/26/14	HF - Needs Follow-up (18+ Adult Contacted) after 08/07/12 - 1	1750
Bacola, Annette	03/26/14	HF - Left Message or Talked to Minor after 08/13/12 - 8	1000

When dealing with a large number of inquiries, it is critical that you are strategic in determining where to invest your efforts. The Inquiry System runs a scoring structure nightly to recalculate the hotness of each inquiry. The hotter the inquiry, the sooner it should be called.

Tip!
Sort your inquiries by their hotness score.

Five weights are added together to determine each inquiry's total hotness score. In the Inquiry System, you can see the total hotness

Hotness	Minimize
Last Scored: 05/23/14	
Friend/Relative	1000
Volunteer within 100 miles	500
School Favorite within 20 miles	500
YFU Airport within 120 miles	0
Manual Weight	save 5000
Total Score:	7000

score or any of the individual weights. The 5 weights include 1 Source Coding - how did this person come to YFU?; 3 Advanced Attributes based on zip code - distance from school, distance from Area Rep, and distance from airport; and 1 Manual Weight - your own input to influence the overall score.

SOURCE CODING: When entering an inquiry, you must select a source. The source indicates how the person came to YFU. Based on the selected source, the inquiry will be assigned the associated hotness weight.

(In a one-time load of the former host families, they were weighted 2001)



Source Code	Description	Weight
Contact Me	Filled in the Contact Me page on YFU's website	2000
Personal	Someone within the YFU network referred this person – student/alumni, friend/relative, host family	1000
Events	Saw YFU at an event – church, fair, conference	750
Media	Heard about YFU through magazine, radio, TV, or list buy (list buys will have identifying names and numbers such as Cmptrax0414)	500
Unknown	Unknown source	250

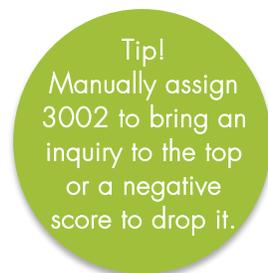
ADVANCED ATTRIBUTES: Based on the attributes below, the inquiry will be assigned the associated hotness weight.

Distance From	Description	Weight
YFU School	The inquiry is within 20 miles of a school that 1) is in my.yfu.org; 2) has a current year profile data-entered; 3) has an enrollment deadline that is blank or in the future.	500
YFU Volunteer	The inquiry is within 120 miles of a YFU volunteer.	500
YFU Airport	The inquiry is within 100 miles of a YFU international hub airport. This is a placeholder for a future Inquiry System update, so the weight is defaulted to zero.	0

When entering an inquiry, you must enter a zip code. If the inquiry's zip code is unknown, enter "00000."

MANUAL WEIGHT: Back on the inquiry's record, you can manually enter a fifth weight. The Manual Weight function allows you to influence the hotness of the inquiry based on other information that you have. You can enter a Manual Weight from -999 up to 9999.

The maximum automatic hotness value an inquiry can reach via the Source Coding and Advanced Attributes weights is 3001. Thus entering a Manual Code above 3002 will assure that an inquiry appears stronger than all auto-coded inquiries.



NEW FEATURE: MORE INTERESTS

There are 5 possible interests for an inquiry: Study Abroad, Host Family, Presentation, Volunteer, and Other. "Other" encompasses sub-categories CCP, Adult Programs and Alumni.

NEW FACT: HIDDEN INQUIRIES

YFU purchases lists which have expiration dates and/or a maximum number of contacts allowed. When a purchased list expires or the maximum number of contacts has been reached, the inquiries must be hidden which effectively removes them from the Inquiry System. Inquiries will be hidden automatically unless it is indicated that someone has spoken to the potential participant and that person has agreed to be our customer. If a hidden inquiry appears on the de-duplicator screen, it can be reactivated by choosing the person record and indicating they are the same so that a new record is not created.



NEW FEATURE: INQUIRY MATERIALS

Once a potential participant's mailing address is entered into the my.yfu.org Inquiry System, a mailing is created and sent. All inquiry mailings include a personalized letter and supplemental content based on the "category" or "interest" selected when entering the inquiry. If more than one category is selected, all associated supplemental content is included. If you don't need or want materials mailed, go into the "Update Materials" and set the counts listed to "0" and save us some postage!



Sample Mailings: [Host Family Mailing](#) ● [Volunteer Mailing](#) ● [Study Abroad Mailing](#)

NEW FACT: DE-DUPLICATING RECORDS

If, when entering an inquiry, a person with the same or similar name already exists in the YFU system, you will be able to link your inquiry to that person if appropriate.

In cases when there is more than 1 duplicate record, look to the right "Affiliations" column and select the record that identifies a role (e.g. Friend, Volunteer, Staff) rather than "Inquiry."

Choose	Relationship to Selected Person	Full Name	BirthDate	Mailing Address	Affiliations
<input type="radio"/> Your Entry		Test Test			
<input type="radio"/> Same Person	<input type="text" value="Choose Relationship"/>	Erin Test		Bethesda MD 20817	Inquiry
<input type="radio"/> Same Person	<input type="text" value="Choose Relationship"/>	Neil Test AKA:Neil Test		6401 Goldsboro BETHESDA, MD 20817	Friend of YFU

NEW FEATURE: INQUIRY MANAGEMENT TOOL

The Inquiry Management Tool (IMT), used to upload inquiries en masse, can be accessed through the wiki (<http://jbod/confluence/display/IT/Use+the+Inq+Mgmt+Tool>). The IMT is an excel-based tool with detailed instructions for use are on the first tab of the excel document.