

Quick Start, how to use easy-Speak in your club, version 1.0

Introduction

When you first start using easy-Speak in your club, it can be very overwhelming. Easy-Speak is so powerful that it takes time to know what to do.

The quick way to get started is to blindly follow this document as it leads you through the major processes with step by step simplified instructions. Once you have followed this document through a couple of meetings you will have seen enough of easy-Speak to start customizing for your club.

The steps in this document were developed and proven over time in a successful club in District 38. It is not the only way to run a club, but it does work well and exposes you to the most important easy-Speak features. After following this guide and getting comfortable using the easy-Speak tool, it may become obvious where you would like to customize the processes to better fit your club culture.

Tip: all buttons and links have hover text which explains the button or link functions. Hover the mouse pointer over the button or link for a second.

Please send any fixes or suggestions to the author: Michael Dobbins

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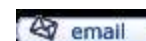
Meeting Processes

Here is the over all Meeting process. Some important details are broken out into other sections: “Visitor Process” and “After Meeting Process” There are also 2 other sample texts that we send to Visitors and new members, see sections: “Visitor Letter” and “Easy Speak Introduction Letter”

Do not mark attendance for anyone but yourself until the meeting occurs or easy-Speak will lose information about member interaction with easy-Speak. This is useful for helping the other members.

Buttons/links/menus used:

- Agenda E-mail: On the meeting page, in the upper right:
- Club Mass Email: Top bar, tab “My Communications” → “Club Mass Email”
- Print Agenda: On the meeting page, in the upper right:
- Print Roster: On the meeting page, in the upper right:
- Print Speech Introductions: On the meeting page, in the upper right:
- Print signup sheet: Top bar, tab “My Participation”, in the upper right:



1-2 days after a meeting

- See “After Meeting Process” for specifics
- See “Visitor Process” for specifics
- Overview:
 - Add Visitors and Guests not in easy-speak/ our club
 - Enter actual attendance and roles, update speech titles and workbook/project
 - Close meeting
 - Send first “Agenda E-mail” to members and active guests

5-6 days before a meeting

- Send third “Agenda E-mail” (members with roles to confirm)
- If open roles, Send fourth “Agenda E-mail” (asking for volunteers)
- Send a “Club Mass Email” to Visitors/Guests with reminder meeting information

2-3 days before a meeting

- Remind speakers with incomplete speech title, introduction, workbook/project (private email)

1 day before a meeting

- Send fifth “Agenda E-mail” (final agenda)
- Send Mentors “Agenda E-mail” (optional)

(continued)

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After agenda closes for updates on day of meeting

- Print 25 copies of agenda
- Optional: Print next meeting Sign up form
- Print roster: 3 copies (for Sign in, TT, Timer)
- Print speech introductions (for TMOD)
- Bring Mission Statement
- Bring visitor sign in form (external form)

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After Meeting Process

It is important to record actual events as they happened after each meeting. It is important to develop a regular rhythm for your meeting process so that they become a habit and work never backs up. This is fundamental to getting value out of the easy-Speak system.

1-2 days after meeting

Buttons/links/menus used:

- Agenda E-mail: On the meeting page, in the upper right:
- Close meeting: On the meeting page, in the upper right:



Outputs from meeting

- Club roster sign in
- Visitor sign in
- Actual meeting roles, speeches noted on meeting agenda
- Next meeting role sign ups, if any.

Step 1: Process meeting agenda and attendance information

- On last meeting page
 - Validate/mark attendance from Club roster sign in, you will need to “show” Visitors and Special guests to mark them
 - Save
 - Update roles, speech titles, workbook/projects, and if the clubs uses them, Awards.
 - Save
 - Close Meeting
 - You may process new visitors at this point or do it later. See: “Visitor Process”

Step 3: Send first “Agenda E-mail”, check only Members, Inactive Members and Special guests

- On next meeting page
 - use the “Send 'Third e-mail'“ link or the “email” button in the upper right, to send the **first** email.
 - This asks people if they are coming to the next meeting to help with meeting planning

Step 4: Process sign ups for next meeting

- On next meeting page
 - assign people to roles as requested
 - Save

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Visitor Tracking Process

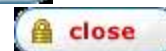
Tracking visitors is optional but has some benefits for the club. If you track visitors and guests, it becomes very easy to use the easy-Speak mail features to follow up after the meeting, to invite them to future meeting and to send them club newsletters or announcements.

It is suggested to add visitors without sending them the automated welcome to easy-Speak message. This is done by adding the person without their email, then editing the account later to add the email. This can lead to confusion as a visitor typically would not care about an easy-Speak account at that point. When they join is the most appropriate time to inform and help learn about the easy-Speak account. This is done by resetting the password, which generates an automated email with their user name and generated password.

1-2 days after meeting

Buttons/links/menus used:

- add user: On the meeting page, in the upper right:
- user search: Top bar, tab “Go To ...” → “User search”
- User list: Top bar, tab “This Club” → “User list”
- User search: Top bar, tab “Go To ...” → “User search”
- Reopen meeting: On the meeting page, in the upper right:
- Close meeting: On the meeting page, in the upper right:



Outputs needed from meeting

- Visitor sign in

Step 1: If the meeting is closed, reopen the meeting for changes

Step 2: Add each new visitors and guests one by one using the “add user” button on the meeting page. If the visitor/guest might have an easy-Speak account it is safer to first do a “User search” on their name and also on their email address to find their easy-Speak user name.

Visitor is new to Toastmasters

- Send email welcoming them to validate email address before creating easy-speak user
 - Ref: “Visitor Letter”
- Create a user as “Visitor”, see below “Adding a new user”

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Visitor is already a Toastmasters member

- Check if the person is in easy-Speak (there must only be 1 easy-Speak user name for each person)
 - Tab: “Go To ...” → “User search”
 - Search on Toastmaster Member number, first and/or last name and or email
 - Select user to see profile for validation, get user id
- If in easy-speak,
 - Add to club as “Special Guest”, see below “Adding an existing easy-Speak user”
- Otherwise,
 - Send email welcoming them to validate email address before creating easy-speak user
 - Ref: “Visitor Letter”
 - Create a user as “Special Guest”, see below “Adding a new user”

Adding a new user

Important: When adding a new to Toastmasters visitor, do not enter email in the add form to inhibit the automatic welcome message. The person is likely not interested in our details, but we still want to track them.

- If the meeting is closed, reopen the meeting for changes
- Click the “add user” button in the upper right
- Set/verify the status and date
- Select “Input full name and email”
- Fill out First name, Family name and (optional) E-mail address
Important: do not enter E-mail address if they are a new to Toastmasters Visitor, but do put in the E-mail address if they are an existing Toastmasters member.
- Click “Submit”
- If you get a conflict or already used error, see if it makes sense to connect the existing user.
- Invent and enter a username
 - A good user name can be the first few letters of the first name followed by the first few letters of the last name. Some people like to use the first part of the email address. “@” is not a valid character for usernames.
- Click “Create New User”
- You may have to have to handle duplicate usernames, etc

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Adding an existing easy-Speak user

- If the meeting is closed, reopen the meeting for changes
- Click the “add user” button in the upper right
- Set/verify the status and date
- Select “Input the user's username”
- Input the easy-Speak username
- Click “Submit”
- It will tell you that it is a duplicate user, confirm adding them

Step 3: Mark attendance for new visitor and guests for the meeting

Step 4: Close the meeting

Step 5: Edit each new visitor and guest

In “This Club” → “User list” (check Visitor management view)




- Edit each new visitor and guest
 - Registration tab
 - E-mail address, if not previously set.
 - Toastmasters member number, if known
 - Toastmasters Awards, if known. ex. CC, CL, DTM
 - Personal tab
 - (optional) Set name to be visible to the public.
otherwise only the username is displayed outside of the club.
 - Set country to “United States”
 - Preferences tab
 - “English US”
 - “GMT – 5 Hours”
 - Club tab
 - May need to “change to this status” to adjust the date
 - Select the proper status and proper date
- Save

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Miscellaneous Club Processes

Here are some miscellaneous club processes.

Buttons/links/menus used:

- Edit profile: Top bar, tab “This club” → “User list” to the right of the user: 
- Leadership chart: Top bar, tab “This Club” → “Club Charts” → “Leadership Chart”
- Speech progress: Top bar, tab “This club” → “User list” to the right of the user: 
- Leadership progress: Top bar, tab “This club” → “User list” to the right of the user: 

Visitor is new to Toastmasters (Overview)

- Greet and if first time, give visitor packet
- Collect email at sign in
- See “Visitor Process” for how to add to easy-Speak
- Age visitors after a few of months of no visits to status: “Mailing List” edit profile → tab “Club” → “Change to this status”

Visitor is already a Toastmasters member (Overview)

- Greet
- Collect email at sign in and Toastmasters member number (if possible)
- See “Visitor Process” for how to add to easy-Speak

New Member Applications Process

- Collect application and dues
 - give dues and application to Treasurer to deposit and process
- Toastmaster Club central tasks
 - add new member and create initial profile
 - pay Toastmasters dues via club credit card
- easy-speak tasks
 - Send: “Easy Speak Intro Letter” (welcome to the club letter) to the new member and copy the On Boarding Process owner.
 - Change visitor status to member (or if not in club user list: See “Visitor Process” for how to add to easy-Speak)
 - If easy-speak not accessed, reset easy-speak password to send a userid/password email
 - Update user information (address, phone, Toastmasters member number) cut and paste from Toastmasters entry
 - Mark Paid-until date for user in “user list”
 - Add tracking for the CL Project

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- via “This Club” → “Club Charts” → “Leadership Chart”
- assign mentor, if requested
 - Edit profile → Club tab
- New member tasks
 - Add Goals for CC and CL
see “Setting Goals” below.
 - Fill out initial survey on easy-speak
 - Request an Ice Breaker speech

Members leaves club

- easy-speak tasks
 - Edit profile → Set user status to “Mailing List”

Non-club-member requests no emails

- easy-speak tasks
 - Edit profile → Set user status to “Past Interest”

Member Dues collected Process

- Treasurer deposit cash or check, Paypal payments moved to checking
- Edit profile → Mark "paid until"
 - Hover “This Club” -> “User List”
 - Click the "paid until" field for the member to update
 - Can sort by "paid until" to group and verify paid dates
 - Can send email to not paid members by marking in the email column, then click email button at the top of the column

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Setting Goals

- Hover “My Participation”
 - Select “View My Speech Progress”
 - Manage your speech goals
 - If you don't have a speech goal, create one
 - Update a current speech goal
 - Delete any completed speech goals
 - Select “View My “leadership” Progress”
 - Manage your leadership goals
 - If you don't have a leadership goal, create one
 - Update a current leadership goal
 - Delete any completed leadership goals.

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On Boarding Process

It is important to the quality of the club and value to new members to ensure that new members can be integrated into the club and function correctly.

(This process is a first pass at identifying the on boarding process. It is expected to change as we learn what is needed. First guess as to who should run this process is VPM or VPE)

The on boarding process is triggered by a copy of the welcome new member letter sent from New Member Application processing.

Idea: Give the new member a few days up to a week to sign on to easy-Speak and develop some questions before contacting.

Items to review with the new member

- 1: Competent Communicator Manual. Help them schedule the Ice Breaker speech.
- 2: Competent Leader Manual. Bring to meeting, get feedback in manual, how to sign up for a role,
- 3: Value of a mentor. Encourage the new member to take a mentor. Help connect them to a mentor or notify the officer managing mentors. (Mentor is set in the easy-Speak user profile under tab “club”)
- 4: Setting goals. (Goals are set in “My participation” tab under Speech progress and Leadership progress for each type of goal)
- 5: Mention the “easy-Speak Video” and “Knowledge map” under the “Help Options” tab

Observe sign in and use of easy-Speak, taking roles and speeches. Followup to ask if the new member needs help. If a mentor is assigned, followup with mentor to see if they have met with the new member.

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Club member introduction letter

The club member introduction letter is used to send customized information about your club and hints for getting started with easy-Speak. The easy-Speak system sends a welcome email when an account is created to help the new user get started. But, if the account was created without sending the welcome email this information is missed and we need to send our own to help the new member get started.

Subject: Collegeville Club Management System

Welcome to the Collegeville Toastmasters club.

Collegeville Toastmasters uses an online club management tool at easy-speak.org for our club. This tool helps us with a nice website, schedule and manage meetings as well as track our individual Toastmaster progress.

Each member has an individual user account which will go with you if you go to another Toastmaster club that uses easy-speak. Your userid is sent to you via an email from the easy-speak system. It will contain a generated password which you may change by clicking on 'profile' at the top of any screen.

To sign on to our club: <http://collegeville.easy-speak.org/>

If you have problems, you can contact the administrator or request on the sign on page to reset your password. This will send you an email with your user id and a new generated password.

I know it is sometimes frustrating to know how to use a new tool like this. I highly recommend that you watch the following short 6 minute video to help you get started navigating easy-speak:

Easy-Speak Basics: https://www.youtube.com/watch?v=uoXK0_FePlM

For tips and tricks, after you sign on, hover over “Home” and select “Members Page”.

If you wish to start working on your first Ice Breaker speech project before you receive your Competent Communicator manual from Toastmasters International, you may download it from here: <http://easy-speak.org/download.php?id=2965>

Feel free to email me or bring questions to the next meeting.

mike

michaelgdobbins@gmail.com

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New Visitor letter

The functional purpose of the new visitor letter is to validate their email address before trying to add it to easy-Speak. Putting in an invalid email address causes extra work for the easy-Speak Site Admins. It is better to leave the email field blank.

This letter is also a way to reach out to the new visitor to make them feel special and welcome to come again. The author of this sample is noted for being terse.

Subject: Collegeville Toastmasters

Thank you for visiting the Collegeville Toastmasters. We hope that you enjoyed the experience and look forward to seeing you again.

Mike Dobbins

Vice President Education

michaeldobbins@gmail.com

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Visitor next meeting announcement

The visitor next meeting announcement is used to create a different/custom message from the standard system generated meeting messages sent by easy-Speak to the members.

Subject: Collegeville Toastmasters, next meeting reminder

Visitors and Guests of the Collegeville Toastmasters club,

I would like to invite you back to our next club meeting:

Thursday 23 June 2016 at 7:00 pm

St Luke's UCC

200 W Main St,

Collegeville, PA 19426

Please feel welcome to show up and enjoy the speeches, table topics and our friendly environment.

I look forward to seeing you again.

mike

Vice-President of Education

michaelgdobbins@gmail.com

If you do not want to receive any future communication from the Collegeville Toastmasters club, please reply to this email with "remove me"