MinistryPlatform Diocesan Onboarding Team: Roles and Responsibilities

PROJECT MANAGER

- Ensures that goals and expectations are identified, documented, conveyed, and adhered to throughout the project, from pre-sale through project completion.
- Works with the Diocese to set the overall Wave Schedule.
- Collaborates with other team members to ensure the project is progressing on schedule, removing any barriers and addressing diocese concerns.
- Main point of contact for the diocese rep. Partners with other internal teams to communicate diocese needs.
- Communicates project status through weekly calls and status reports.
- Fields incoming questions and issues, classifies and assigns to MP team members. Follows reported issues to resolution and reports back to the ministry partner.
- Transitions the parishes (upon wave completion) and diocese (upon project completion) to MP Support and Ministry Success.

IMPLEMENTATION SPECIALIST

- In conjunction with the Project manager, invests in the Diocesan Rep(s) to ensure that the rep(s) is able to support the parishes.
- Provides Diocesan Rep training to ensure that system setup achieves the goals of the diocese.
- Provides training to the Diocesan Rep on adding new staff users, user groups, security roles, global filters, etc., before wave migration begins.
- Reviews data migration checks and validates/spot checks data before diocese handoff.
- Ensures data migration integrity and works with Data Analyst where needed.
- Fields data migration questions and issues. Researches and reports issues, tracks to resolution, and reports back to the Project Manager.
- Ensures parish/diocese go-live readiness.

MIGRATION DATA ANALYST

- Provides support and resources in order to maximize PDS legacy data for migration to MinistryPlatform.
- Leads PDS Data Clean-up training calls, drop-in calls, and fields parish questions.
- Serves as a consultant for PDS legacy data and Dio office roll-out.
- Works with other teams, such as Product Development and data migration, to ensure that MP is Catholic-friendly.
- Analyzes PDS data prior to migration and makes recommendations for data cleanup.
- Checks and validates PDS data during Sandbox and Production data export.
- Collaborates with onboarding and data migration teams to ensure data migration integrity.

COACH/TRAINER

- Creates a training plan and outline for each session.
- Leads the training/coaching calls and provides recommended training resources.
- Assigns training modules and provides training resources.
- Runs point on all training, reporting back to the Project Manager.
- Observes, defines, and documents gaps in training and where additional coaching is needed.
- Identifies coaching needs/opportunities beyond training and engages the organization to define and offer.
- Works with Sales and the Project Manager to create new coaching offerings to help dioceses and parishes achieve mission outcomes.
- Provides training/coaching for any optional/additional coaching time purchased (as outlined in the contract).

MINISTRY SUCCESS MANAGER

- The voice of the customer. Identifies product needs and relays to the development team.
- Serves as a trusted advisor, creating relationships with the diocese and parishes post-onboarding.
- Proactively works to help the diocese and its parishes realize increasing value in the solutions they use and to continually use them deeper, smarter, and more effectively.
- Understands the unique needs of the diocese and parishes and coordinates customer care by partnering with internal MP teams to continually improve their post-onboarding experience.

MP SUPPORT

Provides post-go-live support for out-of-the-box MinistryPlatform functionality via phone, chat, and email. Our Support model is based on defined levels of support, key SPoCs, and communications via the Support Portal. Other resources are also available such as the Knowledge Base, MP Community, and MP Academy.