The Arc Tool – FOC Digital Intake

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Housekeeping

- This Webinar is being recorded
- Copy of slide deck will be sent out with the record after the call
- All lines have been muted to reduce background noise
- We will take questions at the end but please write your questions into the chat box throughout the webinar
- Send any unanswered questions to your local program officer

Agenda

Introduction

The Client Experience

- Intake
- Financial Assessment

Reports

- Daily Intake Digest
- Coach's Report

FOC Feedback

Next Steps

Q/A

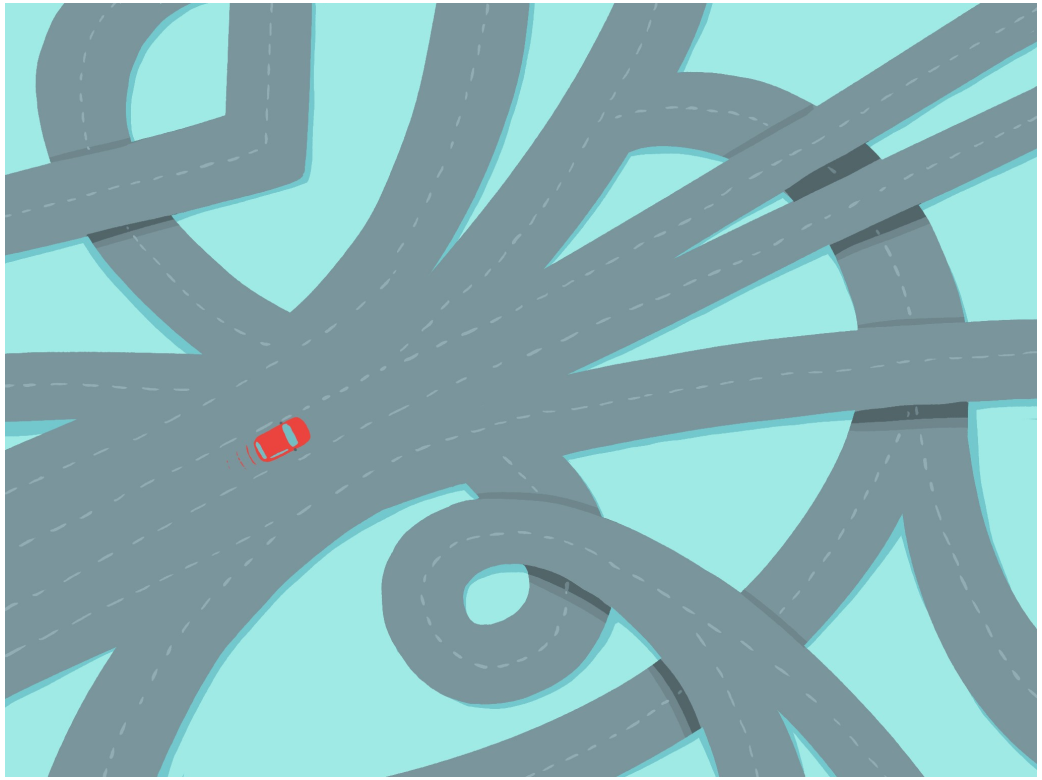
Welcome!

What is the Arc Tool?

The Arc Tool is a client-facing digital intake that is integrated with Salesforce. The tool's primary goal is to connect clients and coaches using a digital approach to compliment financial counseling services.

The Behavioral Science Behind the Tool:

1. More quickly deepen the relationship between coach and client by outsourcing the transactional parts to the tool.
2. Pre-identify trouble spots and goals to help clients feel like they are making progress more quickly.
3. Incorporate visual goal-setting to help pull clients into a longer-term mindset.
4. Reduce decision-paralysis for the coach by providing conversation-starters and talking points.



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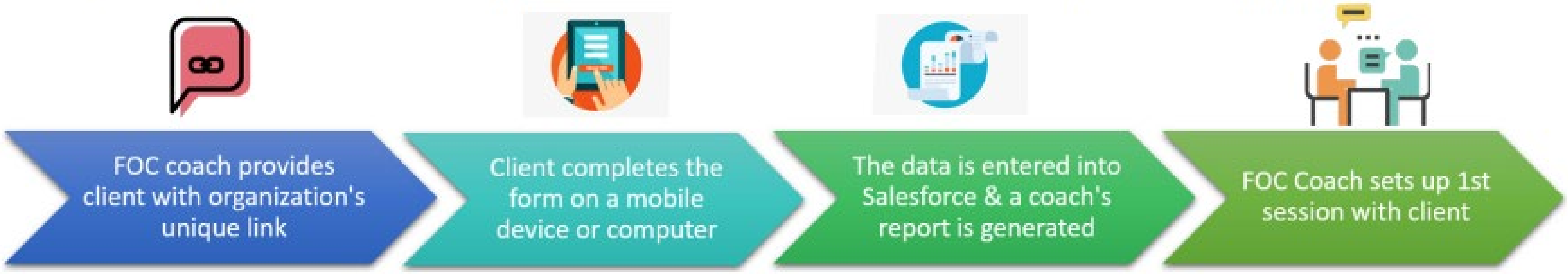
Key Features of the Arc Tool

The ARC tool is built two main features:

- A digitized intake and financial assessment that automatically creates a new case record within Salesforce (reduce data entry burden)
- An automatically generated report with intake information that is sent to coaches prior to a client's first session

The Process:

Once your organization is set up, you will receive a custom link to your landing page.



Arc Tool

Part 1: Intake

Welcome to Breakthrough Urban (test1)'s Intake!

Everyone here at Breakthrough Urban (test1) is committed to helping you to build a strong foundation and reach your goals. Our programs includes three services that will help you reach your goal.

Employment and career coaching

You will recieve personalized support to build the skills and network you need to succeed in today's workforce.

1-on-1 financial coaching

Our financial coaches are dedicated to working with you to create a path forward to reach your goals, whatever they may be.

Access to benefits

We can help you get enroll in services like SNAP, utilities assistance, and affordable health insurance.

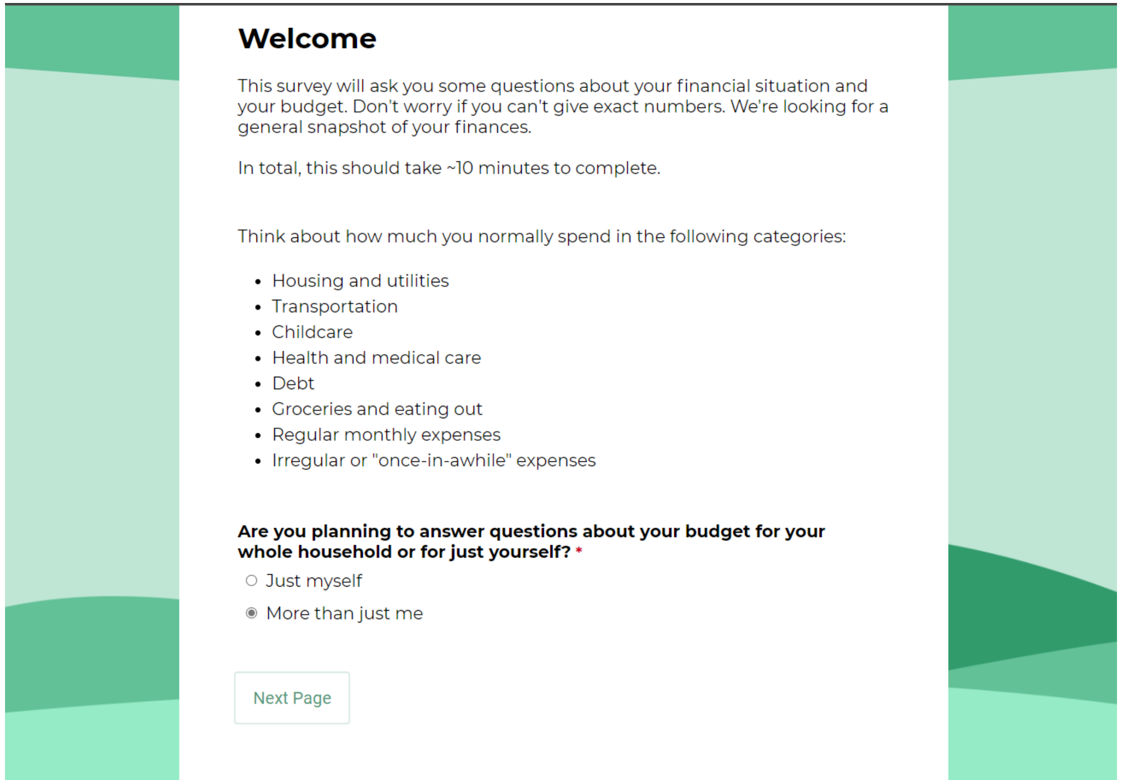
It is a journey that requires commitment, but we are sure that we can get there together. Take the first step by complete a short questionnaire to enroll. It will take you about 20 minutes to complete.

Let's get started

This takes ~15 min to complete. We will ask you questions about:

- Yourself and your household
- Your financial situation
- Your goals for the future

Part 2: Financial Assessment



Welcome

This survey will ask you some questions about your financial situation and your budget. Don't worry if you can't give exact numbers. We're looking for a general snapshot of your finances.

In total, this should take ~10 minutes to complete.

Think about how much you normally spend in the following categories:

- Housing and utilities
- Transportation
- Childcare
- Health and medical care
- Debt
- Groceries and eating out
- Regular monthly expenses
- Irregular or "once-in-awhile" expenses

Are you planning to answer questions about your budget for your whole household or for just yourself? *

○ Just myself

◉ More than just me

Next Page

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Complete!

Sign up with your FOC — Fill out intro survey — Complete your financial snapshot — Attend your first appointment

Great job! You did it!

You're almost done - all that is left is for you to meet with your coach.

Everyone here at [Breakthrough Urban (test1)] is committed to helping you to build a strong foundation and reach your goals.

If you ever have questions or you need anything, please reach out. We are here for you, and we're looking forward being a part of your journey.

A few tips:

- If you need to cancel, do so a day before your appointment by emailing or calling your coach.
- Take a moment to think about and plan how will you get to your appointment if it is in person.
- GET EXCITED! You are doing a great thing for your future.

Phone: 555-555-5555
Email: foc_contact@breakthroughurban.com

Daily Intake Digest

(Max of two people at FOC will receive)

From: **LISC Arc Tool** <arc@lisc.org>
Subject: Site digest for Breakthrough Urban

Hi,

Here is a summary of the clients that enrolled at your site in the last 24 hours.

Contact information

These clients only provided contact information and did not complete an intake or a budget assessment. Their Case Records have not been added to Salesforce. Please review the list of Leads in Salesforce. You need to reach out to them in order to complete the form online using their individualized intake links or with you over the phone.

1. **John Smith**

Intake but not financial assessments

These clients completed just the intake but did not finish the financial assessments. They will have to complete the financial assessments. They could complete the assessment with their coach in the session or you can send them the link to finish the assessment.

1. **Jackie Fake**
   Salesforce Case Record
   Assessment link: https://arc.lisc.org/s/test/u/56fc488b-5dad-4921-91fb-58ab42046abf/
2. **Jake Fake**
   NOT ADDED TO SALESFORCE - Duplicate. See separate email for details.
   Assessment link: https://arc.lisc.org/s/test/u/38e1d5a2-153c-4aef-b079-8afb0924b0c0/

Complete and entered into Salesforce

The clients that completed both an intake and the financial assessments. All you need to do is schedule a session.

1. **John Fake**
   Salesforce Case Record
2. **Sally Fake**
   Salesforce Case Record
3. **Rob Fake**
   NOT ADDED TO SALESFORCE - No email provided. See separate email for details

   Thanks!
   The Arc Tool team

1 Completed Contact only – Not entered into Salesforce

2 Completed intake but not financial assessment – Not entered into Salesforce

3 Duplicate in the system – Based on name and email

4 Completed ! & entered in Salesforce

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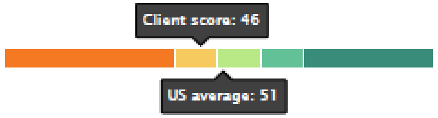
Arc Tool – Coaches Report

DEMOGRAPHICS

31 years old | High School Diploma
Primary language: Spanish
Housing Situation? Rent, subsidized
Household Size: 1 | No Children
Marital Status: Separated

CFPB WELLBEING SCORE



GOALS

VISUAL GOAL-SETTING

This photograph represents financial well-being to me because....
Balance

PERCEIVED ABILITY TO REACH GOALS

How confident are you in your ability to achieve a financial goal you set for yourself today?
SOMEWHAT CONFIDENT

PRODUCTS AND PRACTICES

Checking Account? YES
Do you frequently bounce checks (at least 1/ month for past 3 months)? **NO**
overdraft? **NO**

Savings Account? YES
Do you currently have an automatic deposit or electronic transfer set up to put money away for a future use (such as savings)? **NO**

Bills - In the last 2 months, have you been charged a late fee on a loan or bill? **NO**

Health Insurance? YES
Public health insurance

Budget? YES
Personal spending plan or financial plan

If you had an **unexpected expense or emergency**, how confident are you that your family could come up with money to make ends meet at the end of the month? **SOMEWHAT CONFIDENT**

CONVERSATION STARTERS

CURRENT STATE IN PREFERRED FOCUS AREAS

Health insurance	Budgeting	Savings
7	6	5

"These are areas you said you wanted to focus on and how your rated your current performance in each area. How could we help you feel 1-2 points more confident about these areas?"

MONTHLY BUDGET - [HOUSEHOLD]

TOTAL INCOME
1000

Wage: $1000
Other Income: $-

Benefits: $-
SSI/SSDI $-, TANF $-,
Unemployment $-

TOTAL EXPENSES
-1357

Fixed Costs: $820
Housing $500, Utilities $150, Debt payment $-, Transportation $70, Health $-

Variable Costs: $537
Food $487, Childcare $-, Personal $50

NET INCOME
-357

SATISFACTION WITH CURRENT CIRCUMSTANCES

"This is how you rated your current circumstances regarding different aspects of life. In each, could you tell me a bit more about why you rated your current circumstances the way you did?"

Current Employment Situation
How satisfied are you with your current employment situation?
SOMEWHAT DISSATISFIED

Current Living Arrangement
How satisfied are you with your current living arrangement?
SOMEWHAT DISSATISFIED

Current Health Circumstances
How well do you feel you are able to cover your usual health and medical expenses (including any prescriptions and non-prescription medications)?
SOMEWHAT DISSATISFIED

FOC Feedback

- When is the arc tool link shared with clients? (What point in your client flow)
- How is the coaches report being used?
- Benefits – What do you like the most about the tool?
- Any Troubleshooting recommendations
- User/client perspective /feedback

Next Steps:

1. **Complete the onboarding request form**: https://liscfocpartners.tfaforms.net/31
   - FOC name as you will like it to be displayed on the landing page
   - The contact information for the primary coach who will receive a daily activity digest (via email) as well as a *coaches report* per client.

2. **Getting started with the tool**: You will receive a "Welcome" email with the portal link to share with clients and on a separate email you will receive the user guide.

For support: FFTFOCSupport@lisc.org

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Questions?

thank you!

FFTFOCSUPPORT@LISC.ORG

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