

# Life Cycle Events

Looking at the main systems and processes that are touching regular customers - recurring, public events (Trivia Mafia Classic and Initials Game Live).

- [One-Time Cancellation](#)
- [Site Going On Hiatus](#)
- [Long-Term Schedule Change](#)
- [End Contract](#)
- [New Host Here](#)
- [Long Term Substitutes](#)
- [New Event Starts](#)

# One-Time Cancellation

## What is a Cancellation:

Customer needs to call off regularly scheduled event one time, so we are making sure that it's communicated to the public, to the customer and host, and to billing.

## Why would this happen:

The Customer may have a conflicting or overlapping event, they are closed, there's a big sports/cultural thing they're going to show on the TVs, or maybe the host is unable to be there and no sub is available (weather, illness, or other).

## How does the process work:

### FIRST:

[Schedule Change Form](#) is filled in (by Sam, admin, or customer).

This form creates a record in the Life Cycle Event table, which links to the Schedule record as it is selected by the person filling in the form.

### THEN:

### [Airtable automation](#)

1. Sends a message tagging the Sam/Account Person, Host Manager, Social Media to take action regarding cancellation



**Calendar Bot** APP 11:54 AM

Cancellation request: The Dive Sports Bar & Grill on Tuesday Oct 22, 2024.

[@Sam Wilczyk](#) please update the calendar;

[@Mary Kate Derrick](#) confirm host emailed (Andy Walsh (Eyeball)) and update the caler

[@Brianna Liestman](#) please note for socials and Morning Rounds!

[notes from form: Andy emailed Sam: Bar will be closed this week.]

2. Account Person updates the Public Google calendar. Host Manager looks for automated email to host and manually updates the Host Calendar **for TMC only**. Host Calendar automatically updated for IGL events. Social Media person notes for inclusion in What's Happening (weekly roundup) post and/or same-day posting + inclusion in newsletter the week of the cancellation.
2. Sends a confirmation email to the client who filled out the form.
3. Finds the Host and Site associated with the cancellation
  1. If the Date does not match the expected Day of the Week, the SAM is slack messaged to follow up
  2. The host is sent an email to alert them
    1. If there is a Non-TM host, different email language is used
  3. If the date is less than 168 hours (one week) from now, Chuck is sent a Slack message about billing
 

 Hey @Chuck This The Dive Sports Bar & Grill Trivia Mafia Classic cancellation on Oct 2024 came in less than a week before the event. 
4. If the Cancellation came in more than 21 days ago, a 5 day reminder will be sent to the Customer and the Host (that [Automation](#) is separate!).
4. Reality Table entries get attached to the Cancellation at the time of creation (also a separate [Automation](#)).

## What If:

### Un-Cancelling a One-Time Cancellation

FIRST: Account Person presses the "Un-Cancel This Event" button on the Cancellation Management Interface

THEN:

[Airtable Automation](#) runs!

1. Status of Cancellation (Life Cycle Event record) is changed to Cancelled.
2. Sends email to host to revert prior messaging
3. Sends Slack Message to #existingnights to tag Account Person, Host Manager, and Social Media to revert to the originally scheduled programming.
  1. Account Person/Sam updates public calendar to reflect reinstatement.
  2. Chuck updates billing to reflect reinstatement.
  3. Social Media Person updates What's Happening or makes specific post to reflect reinstatement.
4. Host Manager confirms host received email reflecting reinstatement

## Holiday Cancellations

Life Cycle Event records have a "Holiday Cancellation" Checkbox that will stop all communications going to hosts, clients, and calendars.

To build a quorum of events at once, build a template LCE record of a cancellation with no event schedule attached, with the status of in process, the date of the cancellation, and holiday cancelations checkbox starred. Build a grid that has filters that also match the following requirements:

The screenshot shows a filter grid titled "In this view, show events". It contains four conditions connected by "and" operators:

- Where Life Cycle St... is In Process
- and Life Cycle Ty... is Cancellation
- and Date #1 is exact date 11/28/2024 GMT
- and Holiday Can... is (starred)

At the bottom, there are options to "+ Add condition", "+ Add condition group", and "Copy from another view".

When you build a record into a view with specific criteria, the record will get assigned those traits when they are built.

Navigate to the Reality Table to find all of the events that are scheduled to happen that day.

Paste the Event Schedule records into the schedule spot, expand the table.

# Site Going On Hiatus

## What is a Hiatus:

Customer wants to take a planned, extended break from their event.

## Why would someone go on Hiatus:

Could be a seasonal shift (most common for summer, especially), they are doing some remodeling/renovations and will not be open, or they are evaluating their event programming for the time being.

## How does the process work:

FIRST: [Hiatus Begin Form](#) is filled in (Sam or admin) noting the start of the hiatus, a note (reason for the hiatus provided by customer), and a potential return date (if provided by customer).

THEN:

### [Hiatus Start Notification](#)

1. When the start of hiatus is within 15 days the Hiatus Start Notification automation sends an alert to `#existingevents-alerts` tagging Brenna and Chuck to alert them of the upcoming change.
2. MaryKate is cc'd on an email sent to the host alerting them of the upcoming hiatus.

### [Hiatus Start Status Change](#)

When the final show before the hiatus begins has been performed the system takes the following steps

1. Updates the Status of the Schedule to Hiatus, removes the attached host, and changes the Host Changing status to "on hiatus"
2. Sends a Slack message to Sam alerting them that the event has gone on hiatus and nudging them to send the [hiatus survey](#).
3. Sends a Slack message to #existingevents-alerts tagging Chuck to stop billing, Sam and MK to update the calendars, Marketing to update socials, what's happening, and the website, and AV to pickup any AV equipment.

## Reality Table Entries

The system needs to identify and clear any existing Reality Table entries for after the start of the Schedule's hiatus.

**End Events on Schedule Table:** When an event is put on hiatus, the information is sent to the Font of Reality where the Schedule record is updated with an "end after" date. This stops the creation of new future Reality Table entries.

**Delete all Reality Table Dates after Final Show:** Airtable looks for all Reality Table entries with a date that is greater than the end date identified. It marks them with a "Marked for Deletion" checkbox. This checkbox puts them into a Marked for Deletion view, cueing a Zap to delete the record. This automation split is due to the inability for Airtable automations to delete records, or for Zapier to do an action on a repeated list of records.

## What If:

What if they want to run a theme night during the hiatus?

## They would like to return from Hiatus?

### FIRST:

A SAM fills in the Service Return Date in their Hiatus Management Interface. This date is the first day of service after their hiatus is over.

## Hiatus Start Date

This is the first day AFTER the last show.

You can change this date and it will notify Billing, Marketing, and Host Management. Before changing the date update the notes field details about the date change.

Ex: [Event] is set to go on hiatus March 22nd, the day after their last event on March 21, but they just requested to extend it one more week to round out the month with their last event on March 28th and Hiatus beginning March 29th.

5/22/2024

## Service Restart Date

This is the first day of service after their hiatus is over. What is the first day we want a host to show up?

You can edit this date right here! Just double click.

mm/dd/yyyy

Frequency

Weekly

Event Schedule

Earl Giles Restaurant and Distillery - TMC - Tuesday

Hiatus Notes

Note from Jesse to Sam: "With patio season coming, we'd like to really push our outside space and trivia might "muddy the waters" with our promotions and plans for patio activation."

Host

-

Contact who Confirmed

Jesse Held

Role/Title	Email Address
Owner	jessehheld@earlgiles.com

# THEN:

## Hiatus Ending Notification

When the Service Restart Date is within 21 days of today the following actions will occur.

1. Update the Host Changing status on the Schedule to confirm host returning (from hiatus or long term sub)
2. Update the Schedule Status to Return Pending
3. Sends a message to #existingevents-alerts telling Chuck to start billing, Staffing to confirm the host for the location, and Marketing to create a new ad announcing their return
4. Sends a message to #website tagging Marketing to update their page to remove the Hiatus indication.

## Return to Active, End of Hiatus

6 days before the Service Restart Date the following actions will occur

1. The Schedule Status is updated to Active from Return Pending
2. The Site Status is updated to Active
3. Message is sent to #existingevents-alerts to as a reminder and to prompt Marketing to update the website landing page.
4. Life Cycle Status is updated to Completed

## Reality Table Entries

The system needs to rebuild a Reality Table entry to restart after hiatus.

## Rebuild Hiatus Restarts to Schedule Table

When a Service Restart Date is entered the Reality Table rebuilds a new Schedule Record. This starts the same chain of automations as a New Site Start to build the new Font of Reality dates and Reality Table Entries.

# Long-Term Schedule Change

## What is a Long-Term Schedule Change?

Customer wants to change the day of the week, start time, or frequency of their event.

## Why would this happen?

Could be that they received player/host feedback that they wish trivia started earlier/later, they have a scheduling conflict and want to switch days for better consistency, better for staffing, it's a seasonal thing, or they just feel like it!

## How do we communicate this?

FIRST: [Long-Term Schedule Change Form](#) is filled in (Sam or admin) noting the last day of the current schedule, the first day of the new schedule, and the type of change requested.

THEN:

### [Airtable automation](#)

1. Sends a message tagging the Host Manager and Brand Engagement Director to take action on the schedule change.

Heavy Rotation Brewing Co. - TMC - Thursday has requested a long term schedule change.

Type(s): Start Time

Notes: moving start time up to 630 pm

Current Schedule: Trivia Mafia Classic 7:00 PM on Thursdays, Weekly

The final day of the existing schedule will be Oct 31, 2024 and the first date of their new schedule will be Nov 7, 2024

[@Mary Kate Derrick](#) please note change on host calendar and confirm host availability.

[@Brianna Liestman](#) please create new posters, update their landing page after Oct 31, 2024, and note for socials pl

1. Account Person updates the Public Google calendar. Host Manager looks for automated email to host and manually updates the Host Calendar for TMC only. Social Media person notes for inclusion in What's Happening (weekly roundup) post and/or same-day posting + inclusion in newsletter the week of the cancellation.
2. Creates a draft for the Hosting Manager to follow up with the host about the schedule change to confirm availability.
- 3. [waiting for corresponding second message to pop up in Slack for time change on Oct 31]**
4. Reality Table entries get attached to the Event at time of form submission.

# End Contract

## Why is this happening:

Customers are ending service with us, which could be for a variety of reasons!

The business may be **closing**; trivia may not fit in to their **budget** or they are underwhelmed with the results; their contract may have been for a **limited run** to begin with; or, they may be a company that **we choose to stop** doing business with.

Our policy is to have **one contract per Schedule Event**, so that one Customer Site may have multiple Schedule events, and they may be ending one but not all of them.

## What is the process:

Following the typical/ideal scenario, we would get notice prior to the last event of the Schedule. The SAM would fill in the [End Contract Form](#) that alerts the team of what is happening. This triggers the initial automation.

We need to **alert players** (updating socials and our website), **alert our staff** (tell the Host what's going down) (spoiler: it's their work hours), **stop billing them**, and **pick up our PA** (if they've been using one of our PAs).

## How does that happen:

### End Contract Notification (Future) Automation:

#### First:

Before the final show, message sent to #existingevents-alerts tagging Host Manager, Social Media and our AV Expert to prep for their departure. A draft email is sent to Host Manager to send along to the host (if they are our staff).

LCE record is an Event Termination; status is In Progress.

## Then:

Once our final show has been performed, the system takes it's cue to terminate the schedule. The Schedule status will be updated to match the Change Type that was noted.

Change Types of ends of contracts:

**Ended - by customer**

**Ended - business closed**

**Ended - limited series**

Life Cycle Type	Change Type (LT...
Event Termination	Ended - by customer
Event Termination	Ended - by customer
Event Termination	Ended - business closed
Event Termination	Ended - limited series
Event Termination	Ended - by customer
Event Termination	Ended - business closed
Event Termination	Ended - business closed
Event Termination	Ended - by customer

## End Contract Immediately Automation:

First: When a show alerts us of termination with no more shows to go, the automation puts through all of the actions at once.

## Font of Reality and Reality Table:

**End Events on Schedule Table:** When an event is terminated, the information is sent to the Font of Reality where the Schedule record is updated with an "end after" date. This stops the creation of new future Reality Table entries.

**Delete all Reality Table Dates after Final Show:** Airtable looks for all Reality Table entries with a date that is greater than the end date identified. It marks them with a "Marked for Deletion" checkbox. This checkbox puts them into a Marked for Deletion view, cueing a Zap to delete the record. This automation split is due to the inability for Airtable automations to delete records, or for Zapier to do an action on a repeated list of records.

## What If:

## Notification comes in with no more shows

When a show alerts us of termination with no more shows to go, the automation puts through all of the actions at once.

- Message sent to #existingevents-alerts, Sam to check the calendars, MaryKate to send the host email, [marketing manager] note for socials/WH/website, Davis for AV, Chuck for billing and the app.
- Schedule and Site status are addressed and moved to Ended

## Notification comes after being on Hiatus

When a show alerts us of termination while on hiatus the automation puts through all of the actions at once.

- Message sent to #existingevents-alerts, Sam to check the calendars, [marketing manager] note for socials/WH/website, Davis for AV, Chuck for billing and the app.
- Schedule and Site status are addressed and moved to Ended

## Limited Series

Sometimes we know we'll only be providing service for a predetermined amount of time. If we know the end date for a limited series it is entered as a part of the lead process, and is transferred to the New Event Start LCE upon creation.

If this date is not filled, a standard End Contract process can be followed to enter an end date.

## Customer wants a new game type

If a customer wants to keep their schedule event but simply change the game type (from Trivia Mafia Classic to Initials Game Live, or vice versa), **this is still an end contract action!** We have different terms on the contracts (i.e. with prize values), need to create new posters and assets, and (in some cases) find or re-train the host. The Final Show date would immediately precede the Event Start date.

# New Host Here

## What do we mean by that?

This is when an active Schedule event changes the permanent host. Typically, it's one Trivia Mafia employee replacing another.

## Why would this happen?

Most often a host change is caused by the host's availability changing, but can happen at the request of the customer based on feedback about hosting styles.

This system is for a permanent change in hosting; if you are preparing a **Long Term Substitute**, [there is a different process](#).

## How does the process work?

The Staffing Manager enters the relevant info into the [New Host Here](#) form:

**Status** = In Process

**Type** = New Host Here

**Schedule** = specific Schedule event affected

**Incoming Host** = the new host for here!

**Date of the final show with the vacating host** = the last shift for which that host is paid - select the Reality record

**Date of the first show with incoming host** = first Schedule for which the New Host is listed as the permanent host - select the Reality record

**Notes** = notes/reminders about this particular transition

The [New Host Here Initial Automations](#) update the Host Changing? status on the Schedule Record to "New Host Confirmed, Coming Soon" and sends a channel message to #staffing documenting the change.

This action also initiates the [New Host Here Email Draft - to Brenna Zap](#) which looks for a trainer and sends the appropriate email linking the New Host and the client.

After the outgoing host's final show the New Host Here Change Host after Final Show automation updates the Schedule Record with the incoming host's record, sends a documentation message to #staffing, prompts a new host kit in the #shipping channel, and cues the #website to be changed via slack message.

## What if?

### There are shows between covered by another interim host between the outgoing and incoming host?

If there will be shows hosted by other hosts between the transition, treat those like substitutes. Ex: Host A will be vacating the first week of March, Hosts X, Y, and Z will be covering the rest of March before Host B starts in April. Fill this form out as if host A is the host through March, and their final date of their tenure as assigned host will be the last date in March. The first show for the Incoming host would be the first show in April.

### The date or incoming host changes after it's entered?

This information is stored in the Life Cycle Events table within a view called "[All Upcoming New Host Here's](#)", you can update the information in that view. Alternatively, tag in Michelle or Brenna!

### The New Host or the outgoing Host are Non-TM?

Non-TM Hosts are still entered in our Staff Master base and table, and would be entered just the same as a Trivia Mafia employee, no matter if they are the vacating or incoming.

### The New Host is being trained by the vacating Host?

There should also be a Trainer form filled in for this! Assuming that the New Host would be trained by the vacating Host at the location in question, then Training Date #2 would be the same as Date of the final show with the vacating host.

# Long Term Substitutes

## What is a long term substitute?

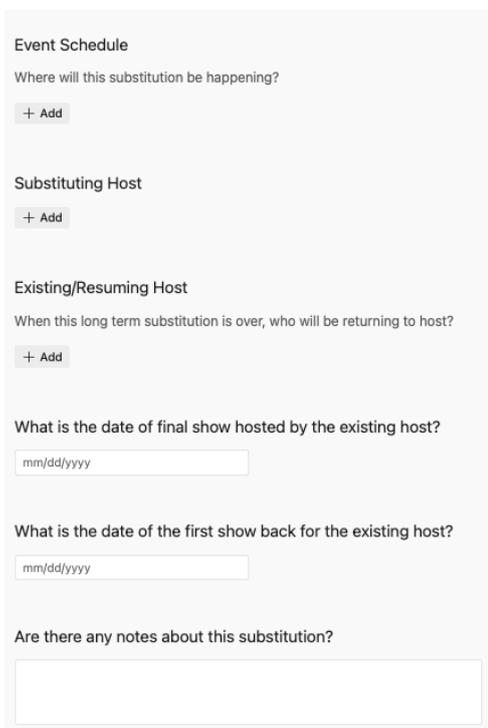
A long term substitute covers three or more shows in a row for a host who needs extended time off. They take over as the assigned host for the schedule and assume all of the duties of the regular host during their substitution time.

## Why would this happen?

Most commonly, it has been for parental leave, but it could also be medical (like a surgery) or other temporary shift.

## How does this process work?

The first step in this process is filling out the [Long Term Substitute](#) form. This form gathers the data about who will be substituting, who they will be substituting for and where, and the beginning and end dates of the substitution.



The screenshot shows a form titled "Event Schedule" with the following sections:

- Event Schedule**  
Where will this substitution be happening?  
+ Add
- Substituting Host**  
+ Add
- Existing/Resuming Host**  
When this long term substitution is over, who will be returning to host?  
+ Add
- What is the date of final show hosted by the existing host?**  
mm/dd/yyyy
- What is the date of the first show back for the existing host?**  
mm/dd/yyyy
- Are there any notes about this substitution?**  
[Text area]

### Initial Automations

After the form is filled, the system updates the Schedule Record's Host Changing status to "long

term sub confirmed, coming soon". A message is sent to the #staffing channel to record this upcoming change via [Long Term Substitutions Initial Automations](#).

### **After the Final Show for the Outgoing Host**

Upon completion of the final show hosted by the outgoing host the system will update the host on the Schedule record to the Substitute via the "[LTS Change Host to Substitute after Final Show](#)" automation. Schedule record Host Needed status is changed to "active long term sub", and a message is sent to #staffing to record this change has happened. Additional automations that run when a host is updated will run, but are not a part of this particular system.

### **2-Week Nudge**

When the return date is within 2 weeks MaryKate will get a slack alert to confirm that the returning host is ready to regain their role on the specified date. Host Changing status is changed to "confirm host returning (from hiatus or long term sub)". [LTS 2-Week Nudge](#)



**Staffing Bot** APP 10:04 AM

2 Week Alert! [@Mary Kate Derrick](#) Michelle Jones has been a long term sub at The Test Site for Testing 88 - TMC - Monday and their tenure is due to be up in two weeks on Monday, Nov 25, 2024. This date can be changed by tagging in Michelle or Brenna.

### **After the Final Show for the Substitution Host**

Once the substitute host has performed the final show in their tenure the system reverts the host assignment back to the returning host. A message is sent to staffing recording the change, and the Host Needed status is updated to "good to go". [LTS Revert Host after Substitution is Over](#)

## **What if?**

What if the dates or returning host is different than what was entered? Call Michelle to update, this could technically be an interface but it's not built.

# New Event Starts

What is a New Event Start:

Once a SAM marks a lead as Contract Received for a new event at a new site or one with which we have an existing relationship.

Why would this happen:

How does the process work:

## FIRST:

SAM marks Lead Contract Received once they ensure all information is entered for the lead. Once this action is taken a whole bunch of system dominoes fall, so be sure things like the Event Name are as they should be.

## THEN:

**The following System actions take place immediately.**

### Airtable Automations

#### **New Site or Existing site Start Pack Automation Runs**

- Creates record in Site List, Schedule Table, Life Cycle Event Table
- Updates the Lead Status to Added to Schedule
- Sends message to Slack tagging the Social Media Manager to build website, sends message if there is a logo to upload

#### **New Event Payment Slack Message**

Sends Slack Message to #newevents-alerts tagging Chuck to set up their payments  
If the event is non-weekly Sam gets a DM to update the public calendar

In the Font of Reality, the following automations occur

#### **Add New Events to Schedules Table**

When an event enters the "New Site Starts" view in the synced Schedules table the automation:  
Creates a record in the Schedule Table  
Updates the NSS record to check the Completion Box

#### **When a New Schedule is Created, Backfill Reality Table Events**

Creates the first 4 Reality Table entries, bringing the Reality Table to current

**When the start date is within 45 days and the Web Page has been created, the New Site - Add to Calendar Zap runs.** This Zap creates the Public Calendar entry, sends a message to Staffing to create the Facebook ad, and sends a message to Mary Kate to copy it to the host calendar.

**When posters are created and the Posters Created box is checked, the Poster & Resource Email Draft Zap** is triggered to create a draft with the links and marketing language.

## 21 Days from Start

### Poster Needs Printing

When the Marketing Asset Creation date is 2 days past and the Poster Print and Ship checkbox is unchecked a message is sent to Brianna to nudge."

## 15 Days from Start

### Sound System Needed Alert (Slack and Email)

If the sound system field is filled in and the options are TM PA, TM wireless mic, or TM Mixing Board a slack message is sent pinging the SAM, Davis and Brenna to be sure they get their equipment. If House Sound is selected an email is sent to Davis and the Contact to arrange a site visit.

### Host Kit Nudge

If Kit Request has been filled as Send to Host or Send to Site a slack message is sent to #shipping tagging Megan. This action can be prevented if the Kit Sent! Checkbox has already been checked via Megan's Interface.

If the status is Kit Needs Not Determined, an actionable message is sent to #newnights to prompt this status update.

### Host + Site Intro Email Draft Zap

15 days before start date, or whenever a host is assigned after that point the Host + Site Intro Email zap is triggered. This Zap creates the draft email from SAM to the Contact with the Host included.

## First Show Day

### Day of First Show Automations

Updates Schedule Record to In Trial

Updates Site Schedule to Active

Reminder to Brenna that the host/site has been connected

Reminder to website builder to remove "Coming Soon" banner

## End of Trial Period

## **Trial Period End Notification**

When the Trial End Date is tomorrow,

Send a slack message to #newnights tagging Chuck and Brenna to update the billing for the next show.

Updates record status to Active

Creates draft email for SAM to site for end of trial

## **What If:**

### **The Start Date changes?**

If the system detects a change to the start time or date for the new event start the following actions occur

#### **When Start Date changes, Restart Some Stuff**

Slack Message is sent to #newnights tagging Social Media, Staffing, and Billing to alert

Checkboxes are unchecked for FB Ad, Web Page Created, and Public Calendar Updated