GiveWP: Multi-form Goals (formerly Milestones)

Product	GiveWP Core or Add-on (still to be determined)
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Introduction 👋

For years, the [give_totals] shortcode has served GiveWP users who were looking to display progress outside of the context of a donation form. This shortcode even made it possible to aggregate progress across multiple donation forms.

Over time, the [give_totals] shortcode has become a go-to recommendation in Priority Support, but its configuration and presentation leave a lot to be desired. This pitch aims to build on the proven use case of [give_totals] while addressing some of its shortcomings through a new concept called *Milestones*.

Job Stories ⚡

Summarize the situation, motivation, and expected outcome.

Donor-facing Job Story

When publicly sharing a goal that spans multiple donation forms with my supporters on the front end of my website, I want to display an up-to-the-minute, eye-catching rendering of the progress so I can motivate my audience to achieve the milestone.

Admin-facing Job Story

When privately sharing organization-wide goals with my fellow admins in the WordPress Dashboard, I want to display these milestones in a format that is easy to skim so I can monitor the progress towards multiple objectives in one place.

Problem 👀

Emphasize the problem by contrasting the current and expected outcomes.

Current Outcome	Expected Outcome
The [give_totals] shortcode is currently the best we can do to communicate multi-form goals, but it is not easily discoverable or configurable without referring to web documentation.	The method of presenting progress is easily discoverable in the WordPress Dashboard and can be configured without knowledge of shortcode attributes.
The [give_totals] shortcode is only rendered on the front end, which means it is not possible for organizers to privately monitor milestone progress that they may not want to expose to their audience.	Progress can be both monitored privately by organizers in the WordPress Dashboard and displayed publicly to supporters on the front end.
The presentation of the [give_totals] is largely unstyled and unlikely to catch anyone's eye without custom CSS.	The presentation of progress is eye-catching and polished. It is capable of being displayed by itself or in concert with other components such as Form Grids and Donor Walls.
The [give_totals] shortcode is limited to displaying revenue totals across all time.	In addition to revenue, progress based on other metrics such as donations and donors can be presented with more control over the date range.

Appetite 📅

Determine how much of our time and attention the problem deserves.

6 Weeks

Based on a team of 2 Developers and 1 Designer.

Solution 🛠️

Describe the core elements that should be executed in order to solve the problem.

Introducing Milestones

A milestone is a standalone goal that tracks a single metric across one or more donation forms.

Above example not intended as design direction.

Milestone Settings

- **Title** - Name of the milestone
- **Description** - Optional summary of the milestone
- **Featured Image** - Image representing the milestone
- **Metric** - What is being measured by the milestone
    - Revenue
    - ~Donors
    - ~Donations
- **Forms** - Which forms are included when calculating progress
    - All Forms, Specific Form(s)
    - ~Form Categories
    - ~Form Tags
- **~Date Range** - Which dates are included when calculating progress
    - All time, Year to Date, Quarter to date, Month to date, Custom
- **~Frequencies** - Which frequencies to include when calculating progress
    - All, One-time, Recurring
- **~Style** - Accent color, background, etc.
- **Link** - Optional. A URL to which the milestone can be linked.

Example Milestones

- Year-to-date revenue across all forms
- All-time revenue across two related forms
- Month-to-date donors across all forms
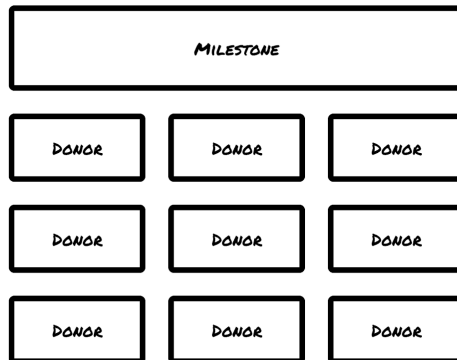
Donor-facing Functionality

The ability to present progress towards a milestone outside of a donation form opens the door to many possibilities that could motivate donors to give.
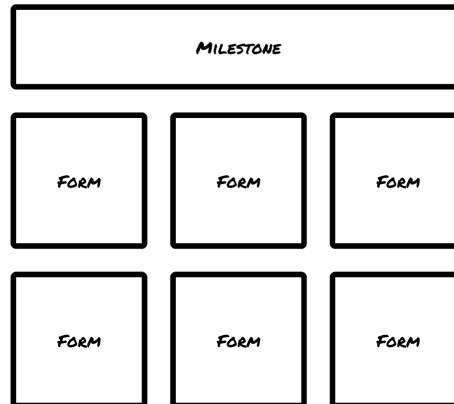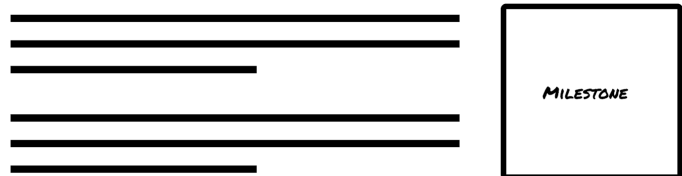
Possibilities

WITHIN AN ARTICLE

ABOVE A GROUP OF RELATED FORMS

MILESTONE

FORM	FORM	FORM
FORM	FORM	FORM

ABOVE A DONOR WALL

MILESTONE

DONOR	DONOR	DONOR
DONOR	DONOR	DONOR
DONOR	DONOR	DONOR

IN A SITE-WIDE SIDEBAR

MILESTONE

Some possible use cases involve displaying a milestone:

1. Within an article or home page
2. Above a donor wall that includes donors from multiple forms
    a. e.g. The milestone is a Giving Tuesday revenue goal, and the donor wall displays everyone who donated to the Giving Tuesday campaign.
3. Alongside a group of related forms in a form grid.
    a. e.g. The milestone is a classroom-wide revenue goal, and each form represents a student.
4. In a site-wide sidebar
5. And more...

Milestone Block

A Milestone block is the primary method with which users would display milestone progress to their donors. The block would allow the user to select an existing milestone for display wherever blocks are allowed.

Milestone Shortcode

As an alternative for those on the Classic Editor or using page builders, a [give_milestone] shortcode would ensure that all users have the ability to display milestones in their preferred environment.

Admin-facing Functionality

Milestone Editor

The milestone editor includes a preview of the milestone at the top of the page with fields to adjust what the milestone represents and how it is displayed. As the fields are changed, the milestone preview could update (either in real time or after save).
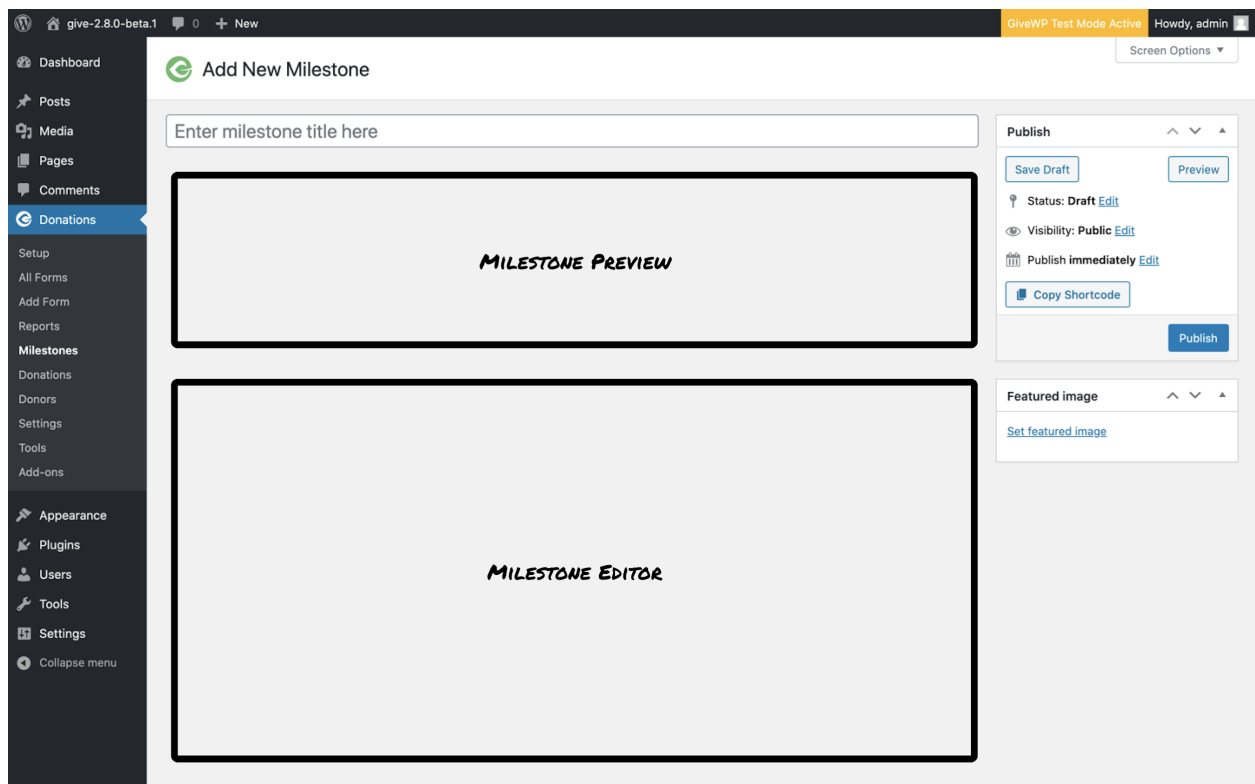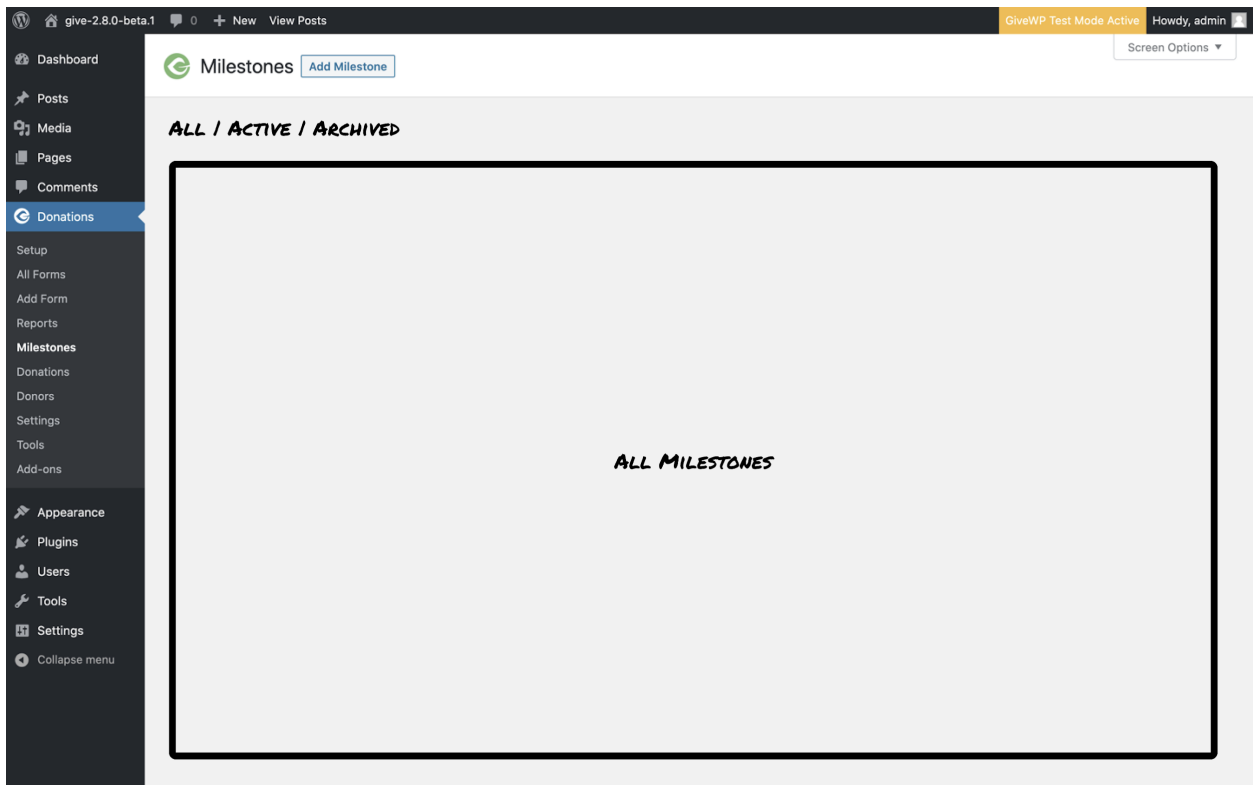

All Milestones

Like other custom post types in WordPress, an admin should be able to browse all of the milestones and filter them according to their status. This could be done through a standard WP List Table or through a more customized presentation.

- **All** - includes both active and archived milestones

- **Active** - includes only active milestones that are likely to be measuring current progress
- **Archived** - includes only archived milestones that are likely related to past progress

Rabbit Holes ⬤

Call out specific details of the solution in order to avoid future problems.

A Milestone is Not a Report

Whereas a report's primary purpose is to inform, a milestone's primary purpose is to motivate, and ultimately celebrate, progress towards a specific, standalone goal. While milestones and reports may communicate similar data, the motivational aspect of the milestone should always remain the focus. Seeing a milestone should make anyone want to complete it.

Visual Design

The visual design of a milestone should feel at home alongside the multi-step form template. Elements from the multi-step template should be borrowed whenever possible, however a milestone should still have a distinct appearance so that it is not confused with a form.

Recurring Donations Implications

When dealing with goals in general, recurring revenue needs to be counted as either a part of the goal or not. A decision should be made about how to account for recurring revenue in milestones.

No-gos 🚫

Identify work that should be excluded from the concept. These functionality and use cases are intentionally not covered in order to fit the appetite.

Widgets

The combination of a shortcode and block should suffice. There is no need to develop a separate widget UI.

Done Done 🏁

Describe what the solution looks like when we've finished what we set out to accomplish. At this point, there should be no other words to use after "done" except "done".

This project is done when there is a discoverable and intuitive process for communicating the progress of a milestone—a standalone goal that spans one or more donation forms—to both donors and admins.