CRM and Cake VI

12 July 2017

@AdaptaforNFP

adapta
processes, people and technology

INSTITUTE OF CONSULTING
RECOGNISED PRACTICE

2017 MemberWise Recognised Supplier

Programme

14.00 **Arrival and welcome**
Iain Pritchard – Adapta Consulting

14:15 **Getting past the demo**
Azadi Sheridan, Adapta Consulting

14:45 **Case studies**
Short stories from speakers
Liz Essex, GOSHCC
Tim Bissett, St Martin-in-the-Fields Charity

16:00 **Discussion and feedback**
All
A round table discussion and feedback.

16.45 **Review and close**
Iain Pritchard – Adapta Consulting

Adapta Consulting

We are:

- A specialist information systems consultancy
- We only work with membership organisations, charities, associations, trusts and others in the NfP sector
- We are completely supplier-independent
- Our consultants have held senior positions in a broad range of different organisations
- Our advice and guidance is based on practical experience gained over many years.

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Introductions

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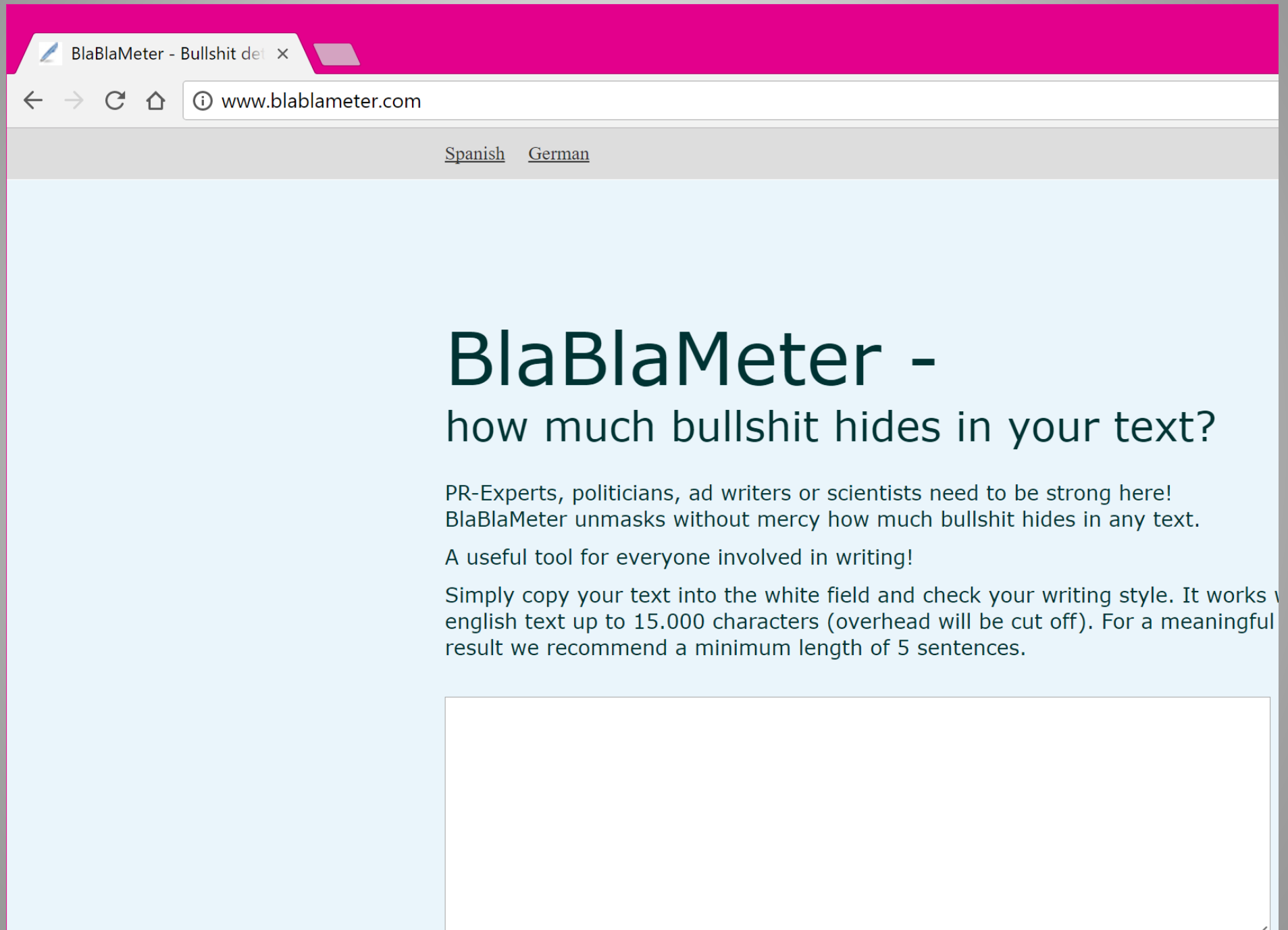
Getting Past The Demo

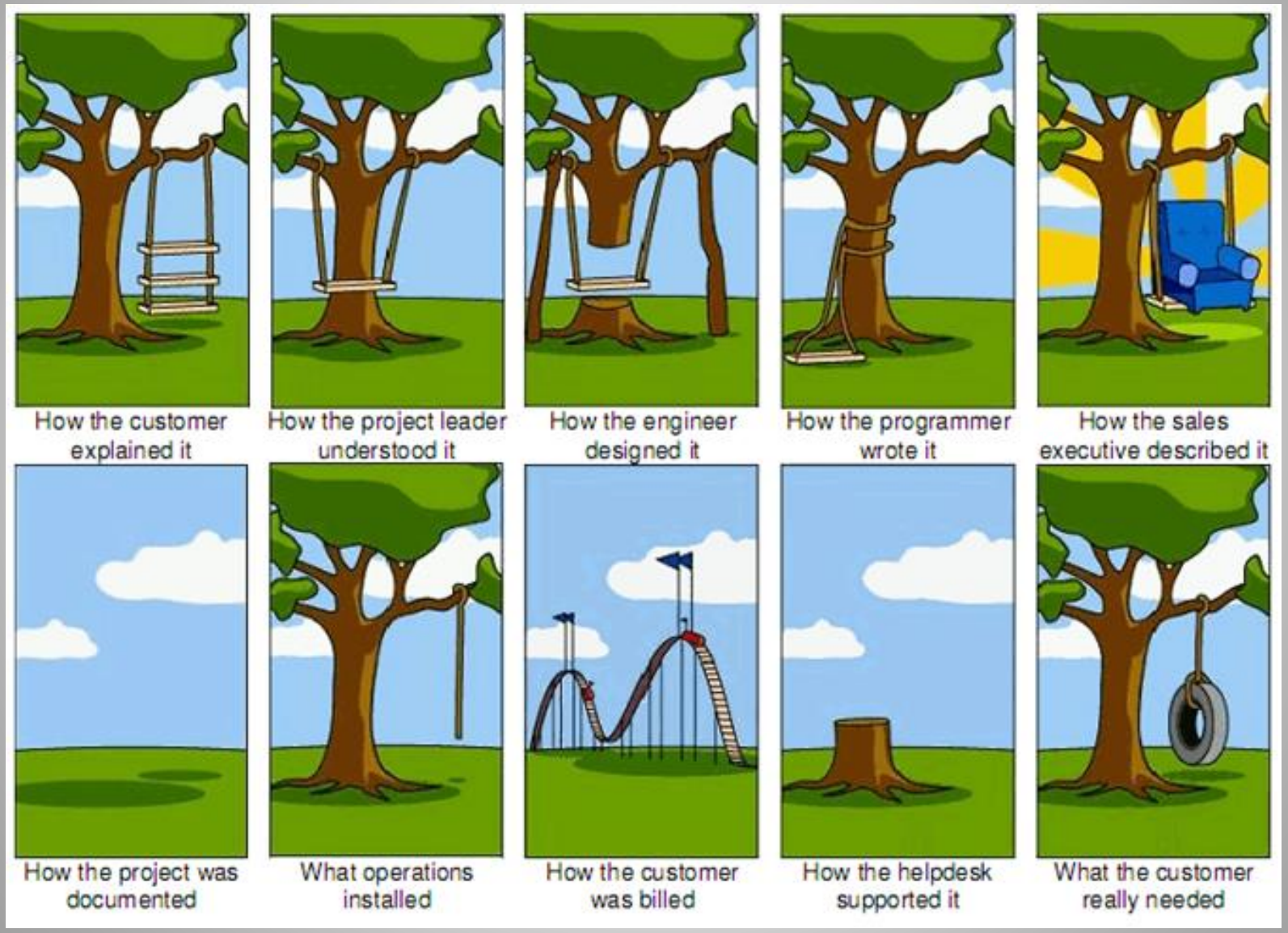
CRM and Cake – 12 July 2017

Azadi Sheridan, Associate

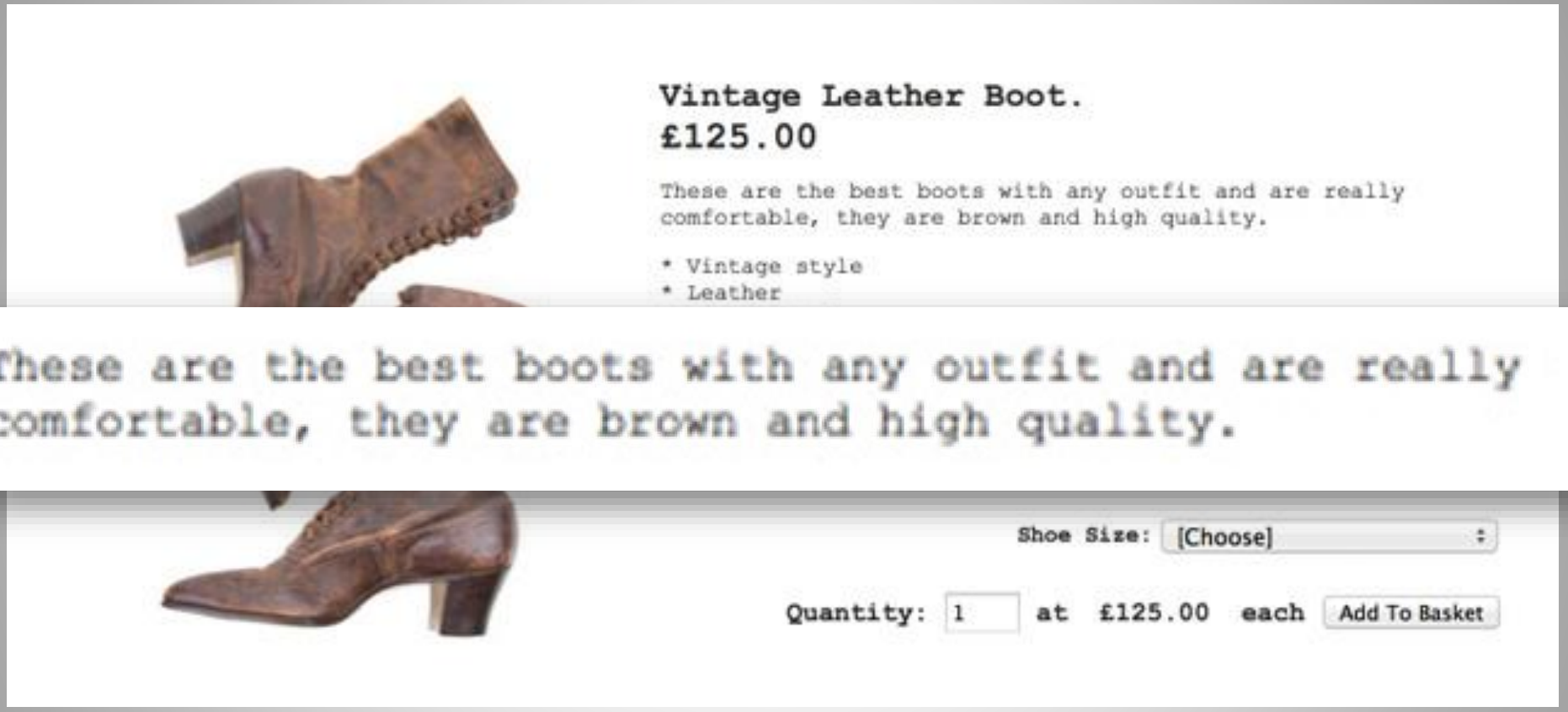

BlaBlaMeter - Bullshit de
www.blablameter.com
Spanish
German
BlaBlaMeter -
how much bullshit hides in your text?
PR-Experts, politicians, ad writers or scientists need to be strong here!
BlaBlaMeter unmasks without mercy how much bullshit hides in any text.
A useful tool for everyone involved in writing!
Simply copy your text into the white field and check your writing style. It works
english text up to 15.000 characters (overhead will be cut off). For a meaningful
result we recommend a minimum length of 5 sentences.

Establish Requirements

Requirements: Never Perfect



Requirements: Never Perfect

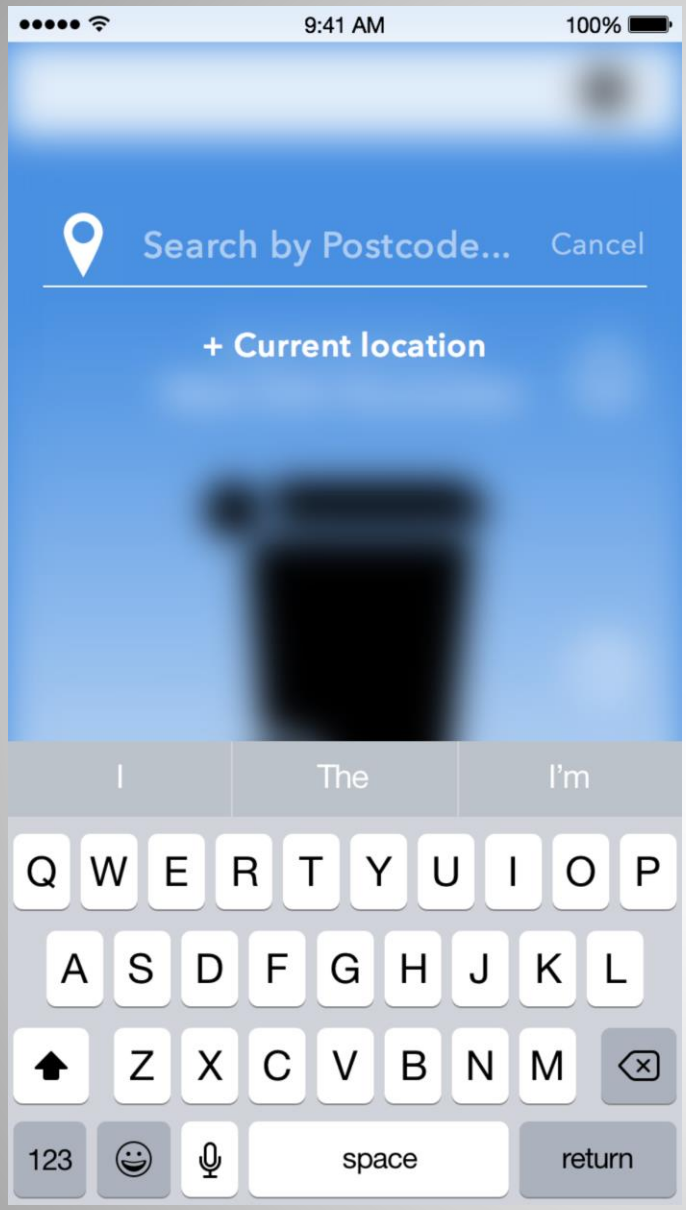


Know who you want to work with – not just what software you want.

The most important decisions you make are not the things you do, but the things you decide not to do.

Steve Jobs

LIKESUCCESS.com



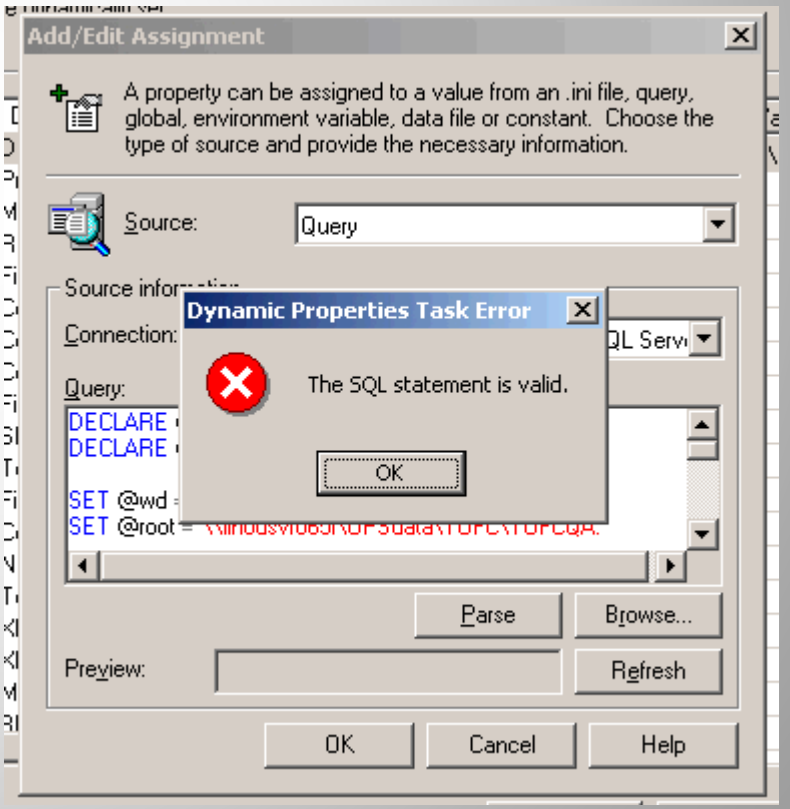
Great Meetings Are Made by Great Agendas

Don’t get
stuck in
PowerPoint

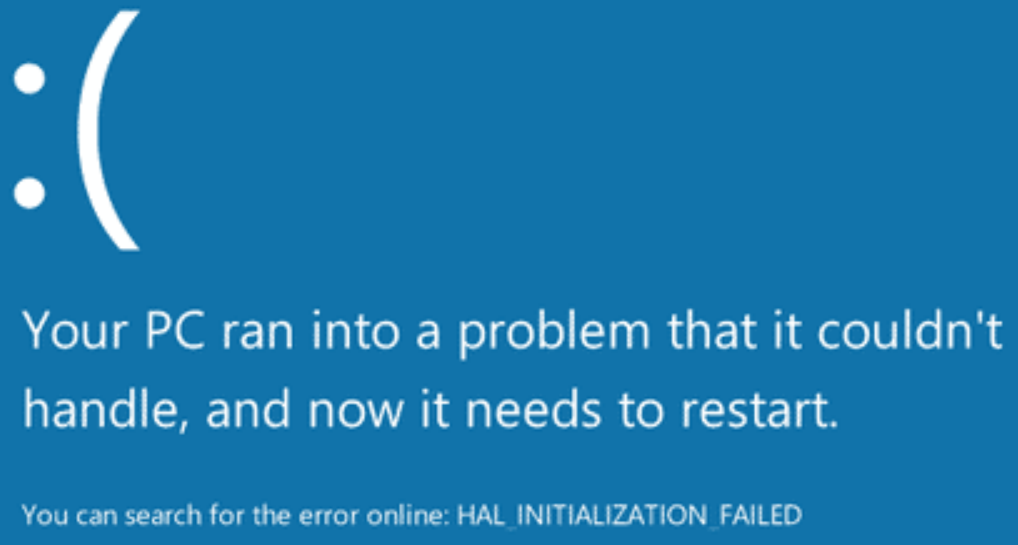
“We can do that”

YES WE CAN

Also known as “You can do that using our intuitive reporting tool.”



“If you hover a mouse over an button but don’t click, the viewer can imagine the perfect version of what happens next.”



It doesn’t “just happen in demos”

Bad:
"We are the biggest/ best/ friendliest"

Good:
"Let me share an example of how we work"

“What do you think best practice is?”

=

“I have no idea about this area, but I know I should.”

“What do you think best practice is?”

=

“This should be in our software. Perhaps you will feel better about that if I give you the mic for a while?”

“Is that
feature
within
the
planned
budget?”

Work through a scenario

Use interview techniques

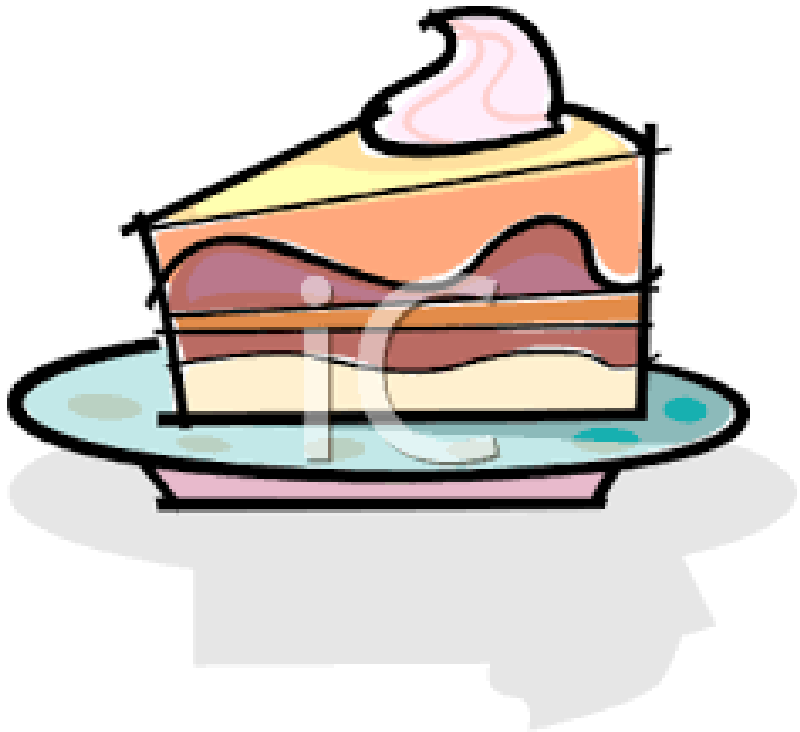
Seek insight rather than answers

Azadi's Demo Tips Summary

1) Establish requirements – know what you are looking for
2) Set-up an agenda for success – focus on requirements and gaps in understanding
3) Watch out for smoke and mirrors – ask questions
4) Use actual scenarios – get a little test drive
5) Interview not just demo
6) Suppliers are people too – encourage them along with humour and decent tea

Thank you!

Cake



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GREAT ORMOND STREET HOSPITAL CHARITY

SALESFORCE CRM SELECTION
LIZ ESSEX

12-July-2017

AGENDA

- CRM aims
- CRM Selection & tender
- What can go wrong?
- Salesforce
- Current Status
- Next 6 months
- Q & A

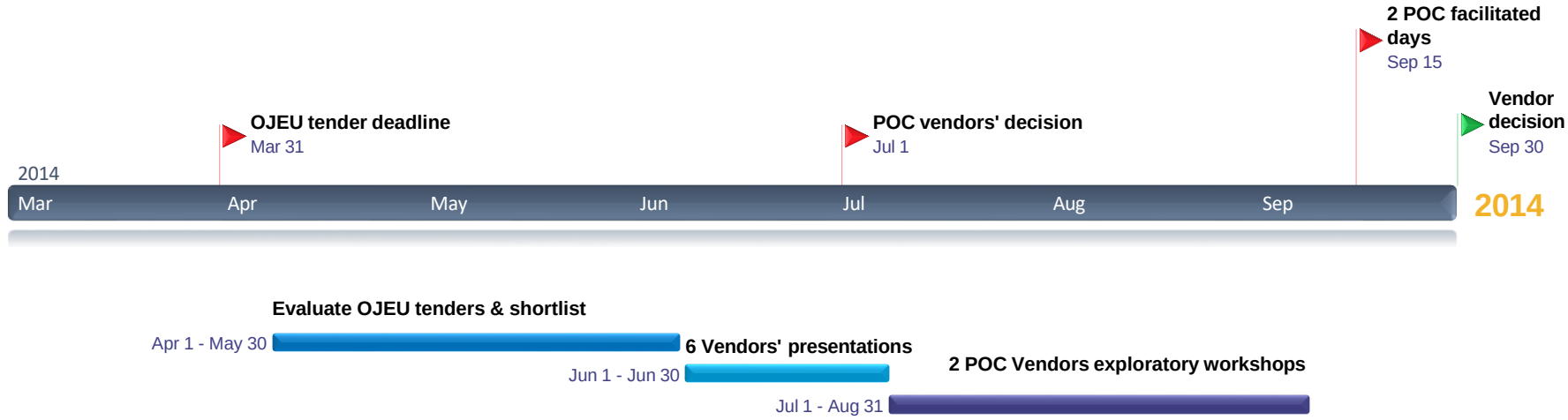
CRM AIMS

- **Salesforce CRM:** Replace the Charity's legacy Raiser's Edge system, version development roadmap parked and would not enable the charity to comply with upcoming regulatory changes. Providing a full view of a supporter's interaction with the charity across all our fundraising teams.
- **Salesforce Wave Analytics:** Unlock the insight held in our new CRM systems data, enabling all fundraisers to access dashboards and reports in real time, without the need to rely on the central Business Intelligence team.
- **Salesforce Marketing Cloud:** Automate Email and SMS marketing journeys, reducing the need for teams to manually process files and improving supporter journeys (e.g. event registration, instructions, advice and donation chasing)
- **Direct Debits:** Connecting to a third party provider of Direct Debit processing to reduce the risk of missed collections and reduce reliance on limited numbers of GOSH Charity staff.
- **Data Import Automation:** Data is the life blood of fundraising teams; implementing strategic technology to reduce the manual effort required to load data from many external sources (such as Just Giving and Virgin Money).
- **Integration with Finance System:** Integrating Salesforce with the Charity's Agresso finance system to ensure the fundraisers have accurate information that matches the management accounts, and also provide monthly reconciliation of donations against income.

CRM SELECTION & TENDER

- **Do you really need a new CRM?**
- Consultancy to help create tender framework
- Confirm high level requirements – user stories (1,100)
- Create RFI
- OJEU
- Potential vendors and market research

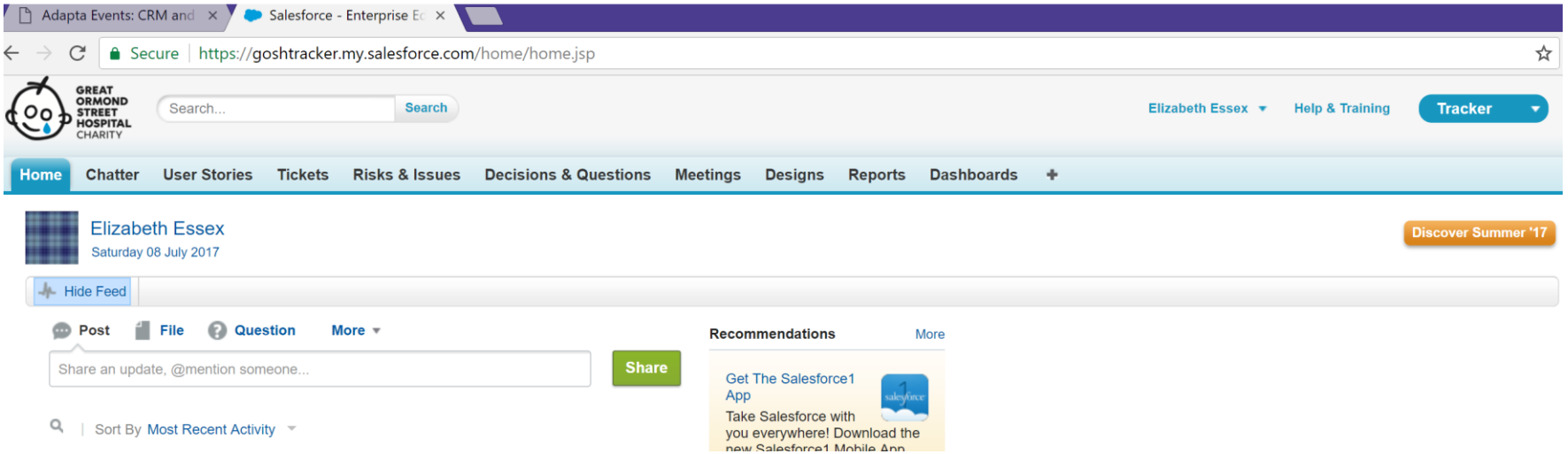
CRM SELECTION & TENDER



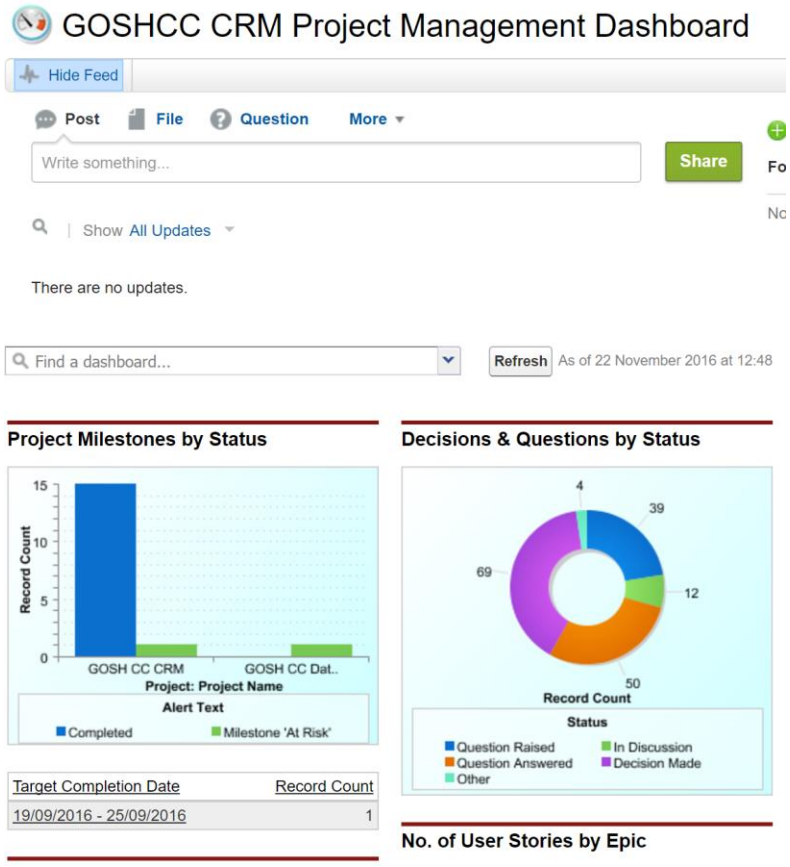
VENDOR SELECTION & TENDER

- **Track Record:**
  - Is CRM part of their core services?
  - References?
- **Capability:**
  - Skills, certifications?
  - Project management, architecture and integration, business analysis, effort estimation, developers, test management and scripting, deployment, information governance, business intelligence, plug-ins, legal
  - Where is the data at rest?
  - Charity experience is helpful, but not always necessary
- **Capacity:**
  - How many in their project and technical team?
  - Will their project and team be dedicated to your project solely?
- **Do they deliver what they promised, by when they promised it?**

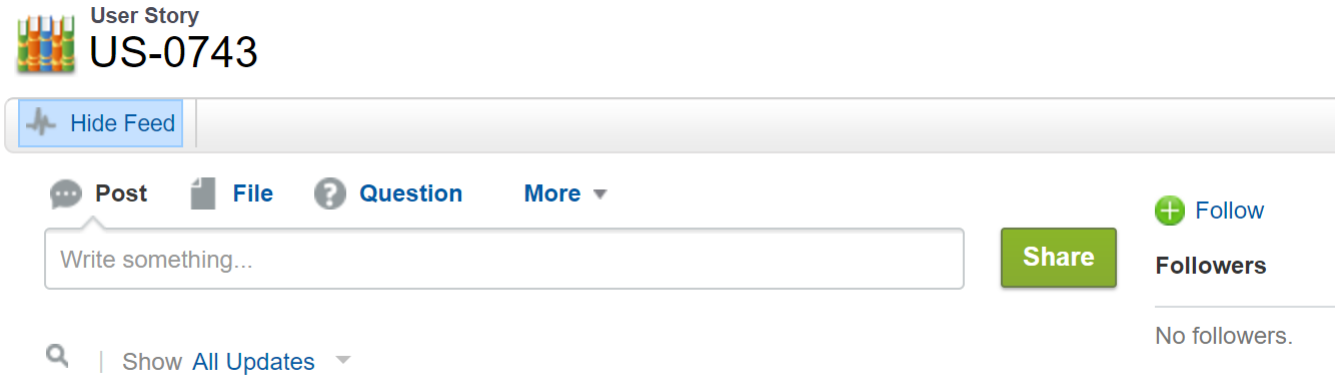
TRACKER: PROJECT MANAGEMENT & COLLABORATION TOOL



TRACKER: PROJECT MANAGEMENT & COLLABORATION TOOL



TRACKER: PROJECT MANAGEMENT & COLLABORATION TOOL



TRACKER: PROJECT MANAGEMENT & COLLABORATION TOOL

« Back to List: User Stories

User Story / Design Links [0] | Related User Stories [0] | Test Scripts [2] | Tickets (User Story) [1] | Test Executions [2] | Risks & Issues [0] | Decisions & Questions [0] | SCM Commit User Story Links [0] | Open Activities [0] | Activity History [0] | Notes & Attachments [3] | User Story History [20] | User Story AC/CC History [2] | User Story Approval History [0]

User Story Detail

Edit | Delete | Clone | Acceptance Criteria Editor | Submit for Approval

Detail

US Ref	US-0743	Status	Passed (Complete)
Project	GOSH CC CRM	Cancellation Reason	
App		Close Date	23/06/2017
Parent Epic	E-0175	Outstanding questions	
Epic Name	Wave	Original User Story Ref	US-01089
Epic Themes	Reporting	Related User Story	
Functional Area			

User Story Description

As a...	CRM user - DO NOT USE
I want to...	have a Shopping List dashboard
So that...	this info is available at a glance
Acceptance Criteria	See attachments for KPIs
Non Functional Requirement	N/A
RE Benefits Tracking	

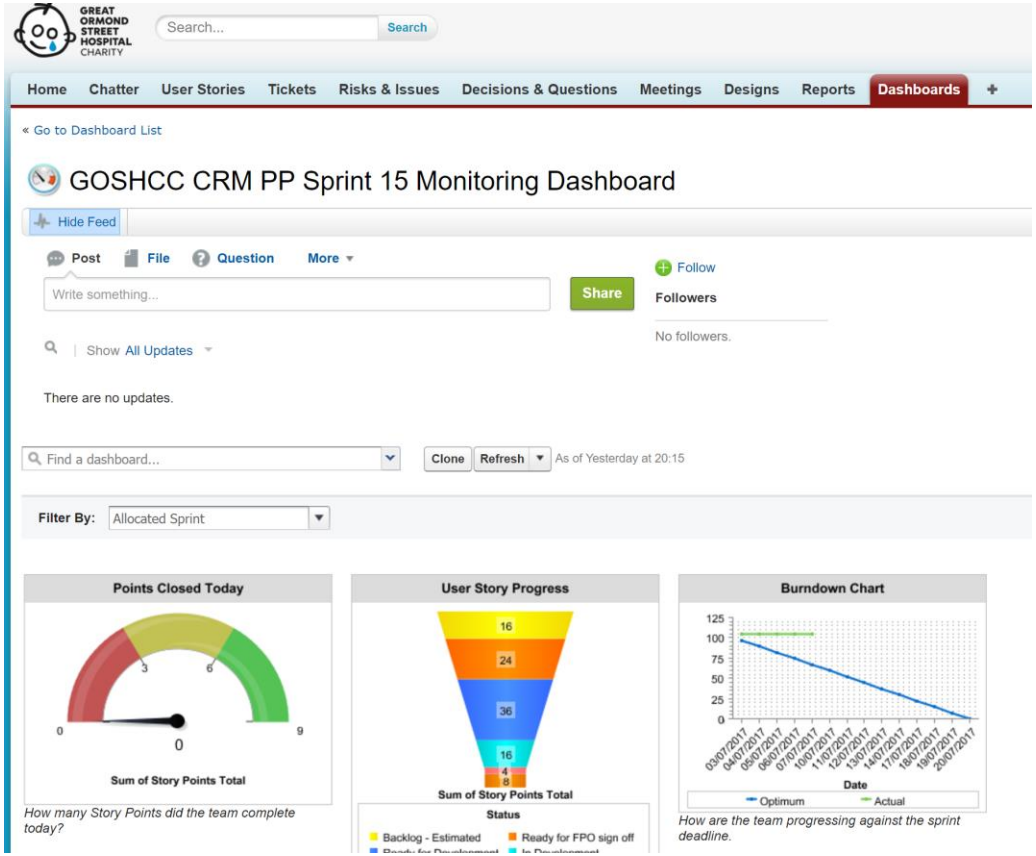
Sprint Team

User Story Primary BA	Louis Fox	Developer	Louis Fox
User Story Secondary BA		Developer II	
User Story Primary FPO	Charlotte Townsend	Sprint Tester	Jennifer Bochenski
User Story Secondary FPO		Sprint Scripter	Mitali Dargani
Do Not Send Update Emails	☐	Peer Reviewer	
		Epic Primary FPO	
		Epic Secondary FPO	

Sprint Planning

Priority	2	Story Points SFDC	5
Proposed Sprint		Story Points (Other)	
Allocated Sprint	Sprint 14A	Story Points Total	5

TRACKER: PROJECT MANAGEMENT & COLLABORATION TOOL



How many Story Points did the team complete today?

How are the team progressing against the sprint deadline.

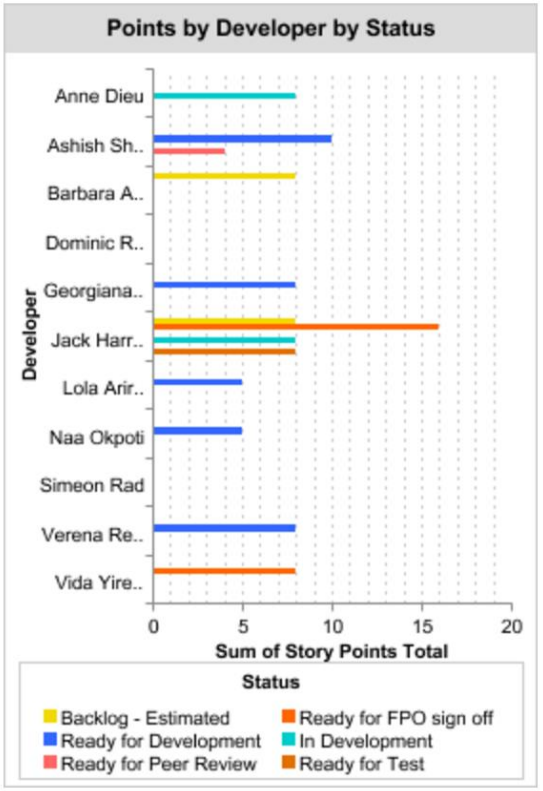
TRACKER: PROJECT MANAGEMENT & COLLABORATION TOOL

What are the status of the User Stories in this sprint? Weighted by the effort (Story Points)

Status	Sum of Story Points Total
Backlog - Estimated	16
Ready for FPO sign off	24
Ready for Development	36
In Development	16
Ready for Peer Review	4
Ready for Test	8
Total	**104**

Points Assigned by Business Analyst

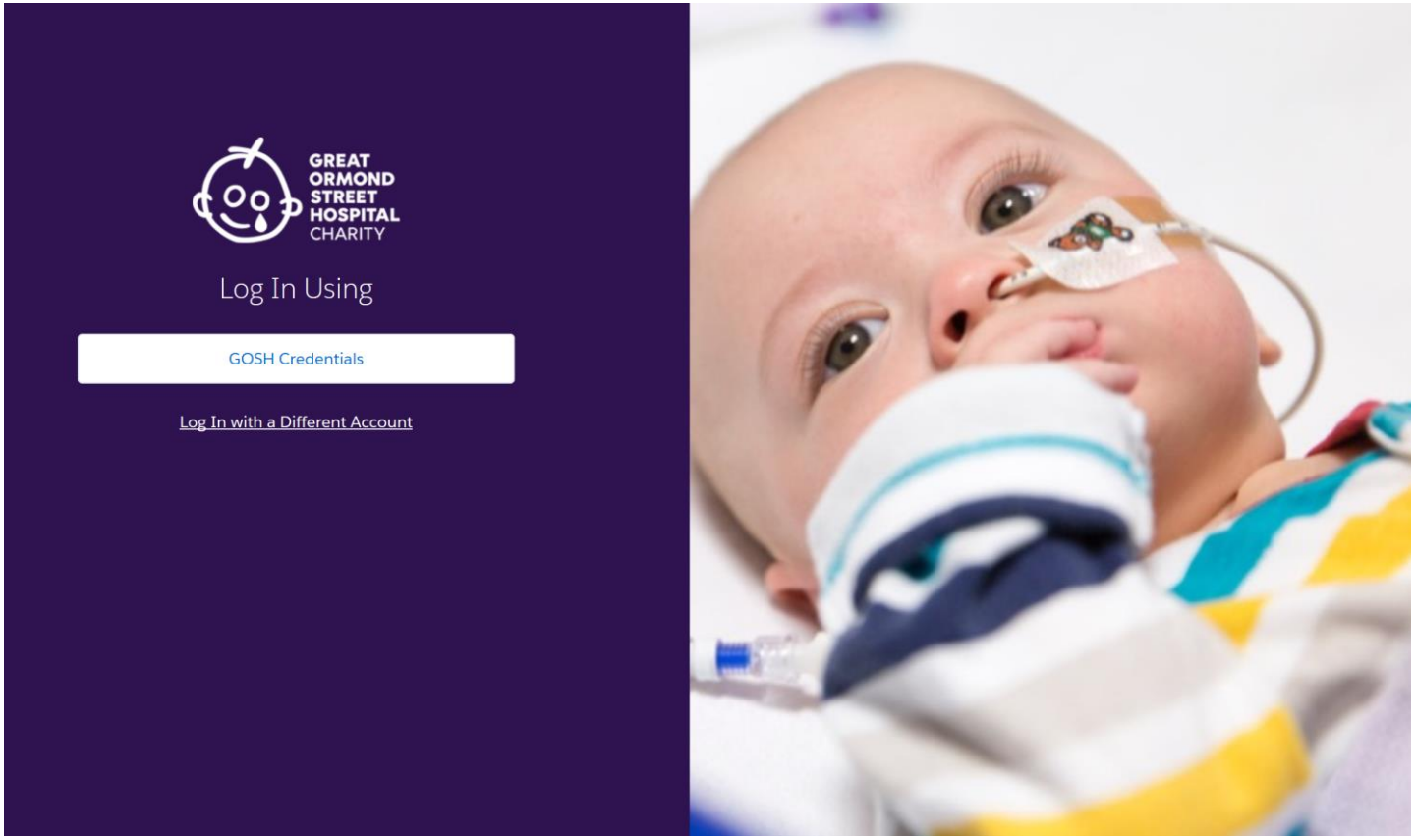
User Story Primary BA	Sum of Story Points Total
	40
Anne Dieu	32
Naa Okpoti	16
Vida Yirenkyi	16
Georgina Osborne	0



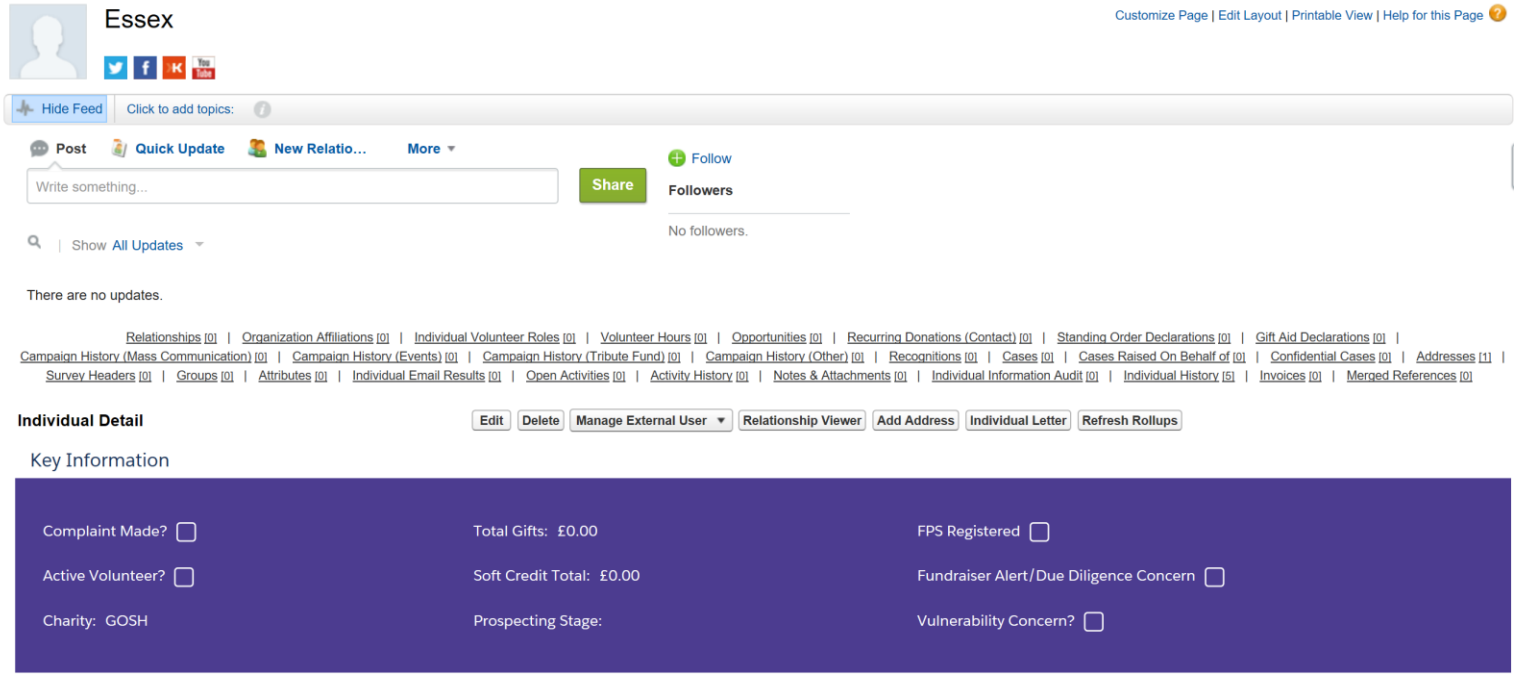
WHAT CAN GO WRONG?

- **Charity:**
  - Lack of senior management engagement risk
  - Lack of change management expertise
  - Capability risk
  - Capacity risk – dedicate staff to the project team
  - Pace of change
  - Financial risk
- **Vendor:**
  - Capability risk
  - Capacity risk
  - Financial risk

SALESFORCE


GREAT ORMOND STREET HOSPITAL CHARITY
Log In Using
GOSH Credentials
Log In with a Different Account

SALESFORCE


Essex
Customize Page | Edit Layout | Printable View | Help for this Page
Hide Feed
Click to add topics:
Post
Quick Update
New Relatio...
More
Write something...
Share
Follow
Followers
No followers.
Show All Updates
There are no updates.
Relationships [0] | Organization Affiliations [0] | Individual Volunteer Roles [0] | Volunteer Hours [0] | Opportunities [0] | Recurring Donations (Contact) [0] | Standing Order Declarations [0] | Gift Aid Declarations [0] | Campaign History (Mass Communication) [0] | Campaign History (Events) [0] | Campaign History (Tribute Fund) [0] | Campaign History (Other) [0] | Recognitions [0] | Cases [0] | Cases Raised On Behalf of [0] | Confidential Cases [0] | Addresses [1] | Survey Headers [0] | Groups [0] | Attributes [0] | Individual Email Results [0] | Open Activities [0] | Activity History [0] | Notes & Attachments [0] | Individual Information Audit [0] | Individual History [5] | Invoices [0] | Merged References [0]
Individual Detail
Edit
Delete
Manage External User
Relationship Viewer
Add Address
Individual Letter
Refresh Rollups
Key Information
Complaint Made?
Total Gifts: £0.00
FPS Registered
Active Volunteer?
Soft Credit Total: £0.00
Fundraiser Alert/Due Diligence Concern
Charity: GOSH
Prospecting Stage:
Vulnerability Concern?

CURRENT STATUS

Achievements

- **Salesforce Functionality - Phase 1 fully implemented**, Phase 2 developed and in testing. **Marketing Cloud live** and first email campaigns in planning
- **Raisers Edge – dormant since 30th April** and various spreadsheets now replaced
- **Data Integrity -** Finance reconciliation between Agresso and Salesforce in place (net known differences on 2 months May and June)
- **Historic Data Migration – large volumes and highest priorities completed** including 35 million opportunities (income records) migrated – number of records exactly reconciled to RE, £0.85p difference on over 20 years' income data.
- **Data Imports** – high volume and value DDs operational
- **Reporting** - several dashboards and reports developed
- **Benefits and Improvements** – being realised and shared with wider teams

CURRENT STATUS

Work in Progress

- **Imports** – GOSH Charity staff being trained in developing other imports
- **BI Warehouse** – aiming for go live by end of July
- **Gift Aid claim** – submitting first high volume claim
- **Reporting** – ensuring consistent and ‘one version of truth’. Also ongoing work in skills and knowledge transfer

NEXT 6 MONTHS

- **Ongoing technical support**
  - Contracts in place with re imports, exports, data
  - Salesforce – Programme Architect volunteering over next 4 months
  - January/February 2018 – tender for ongoing Systems Integrator support
- **Building GOSH Charity team**
  - Internal appointments and securing key team members' knowledge transfer
- **Change Management**
  - Ongoing confidence building and knowledge sharing, building into our "business as usual"
- **Knowledge and Skills building**
  - Sprint 15, partnering with Deloitte, QBase, Salesforce
- **Process Improvement/Simplification**
  - Review new processes to ensure maximising opportunities of Salesforce
- **Benefits Case**
  - Reviewing benefits case on regular basis

Q & A

Case study

Tim Bissett

Director
St Martin-in-the-Fields Charity

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St Martin-in-the-Fields Charity

BBC
RADIO
4
CHRISTMAS
APPEAL
90
YEARS
St
Martin
in
the
Fields

BBC Radio 4 Christmas Appeal with St Martin-in-the-Fields

- Longest running Radio Appeal in the world – since 1927
- One of three BBC partners charities – with Comic Relief and Children in Need
- Broadcast partners are BBC Radio 4 and BBC Radio 4 Extra

BBC RADIO 4 CHRISTMAS APPEAL 90 YEARS

St Martin in the Fields

BBC Radio 4 Christmas Appeal with St Martin-in-the-Fields

- ‘Appeal Day’ first Sunday in December
- Partnership period 1 November to 31 January
- Multi-platform campaign including broadcasts, trailers, social media, DM and email
- Audience of approx. 1.4 million Radio 4 listeners
- £2.2m income from 20,000 in 3 weeks

BBC RADIO 4 CHRISTMAS APPEAL

90 YEARS

St Martin in the Fields

2016 Appeal Total

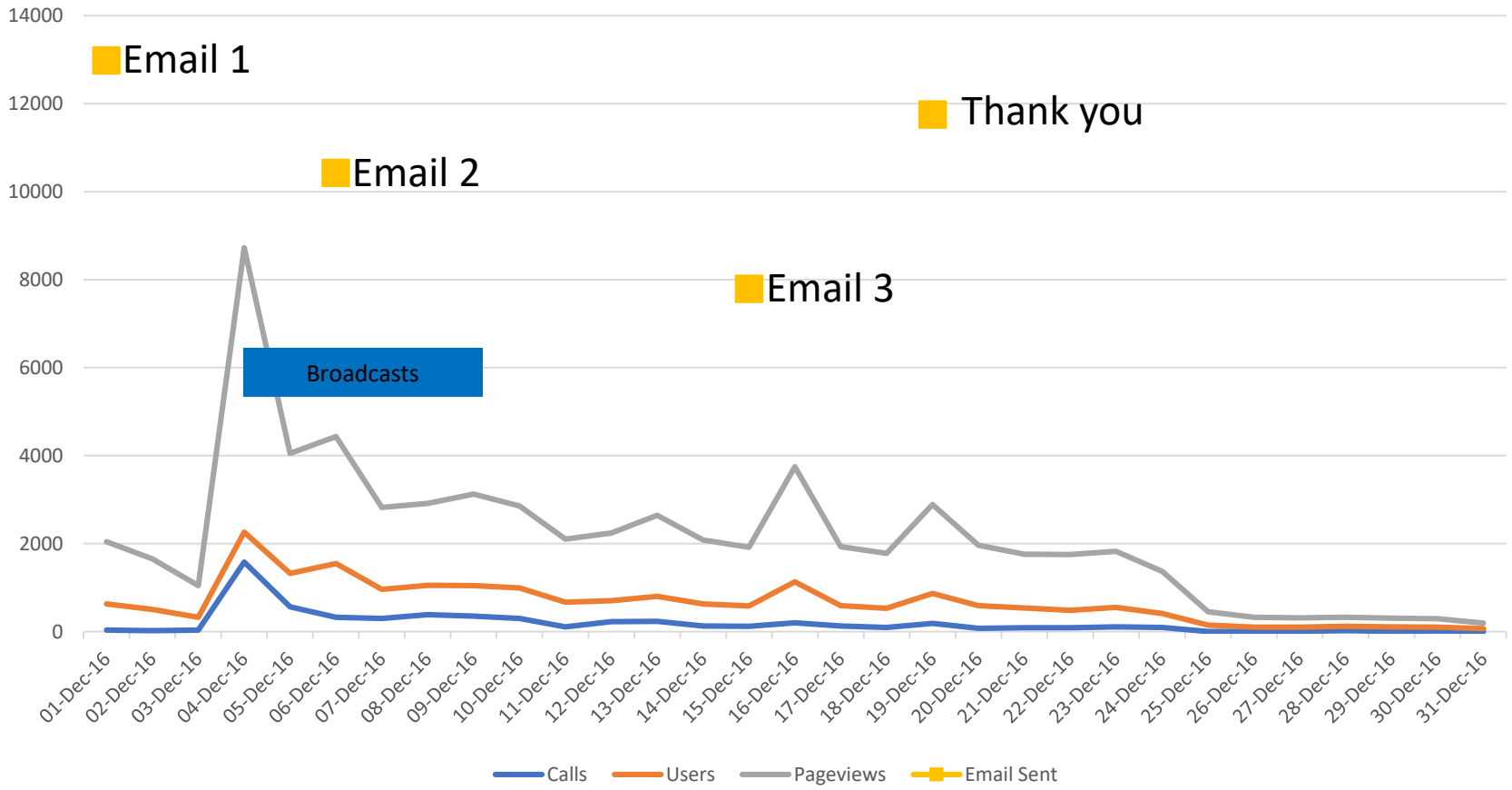
£2,846,596

BBC RADIO 4 CHRISTMAS APPEAL

90 YEARS

St Martin in the Fields

Activity


14000
12000
10000
8000
6000
4000
2000
0
Email 1
Email 2
Email 3
Thank you
Broadcasts
01-Dec-16
02-Dec-16
03-Dec-16
04-Dec-16
05-Dec-16
06-Dec-16
07-Dec-16
08-Dec-16
09-Dec-16
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26-Dec-16
27-Dec-16
28-Dec-16
29-Dec-16
30-Dec-16
31-Dec-16
Calls
Users
Pageviews
Email Sent

Why Donorfy?

Human Reasons

- Knew FB Consulting (Robin, Ben and Lindsay)
- Price – it's affordable, priced on constituents not users
- 100% cloud based

BBC RADIO 4 CHRISTMAS APPEAL

90 YEARS

St Martin in the Fields

Donorfy

Our system

- 43k constituents
- Use most of the integrations
- 6 users

BBC RADIO 4 CHRISTMAS APPEAL 90 YEARS

St Martin in the Fields

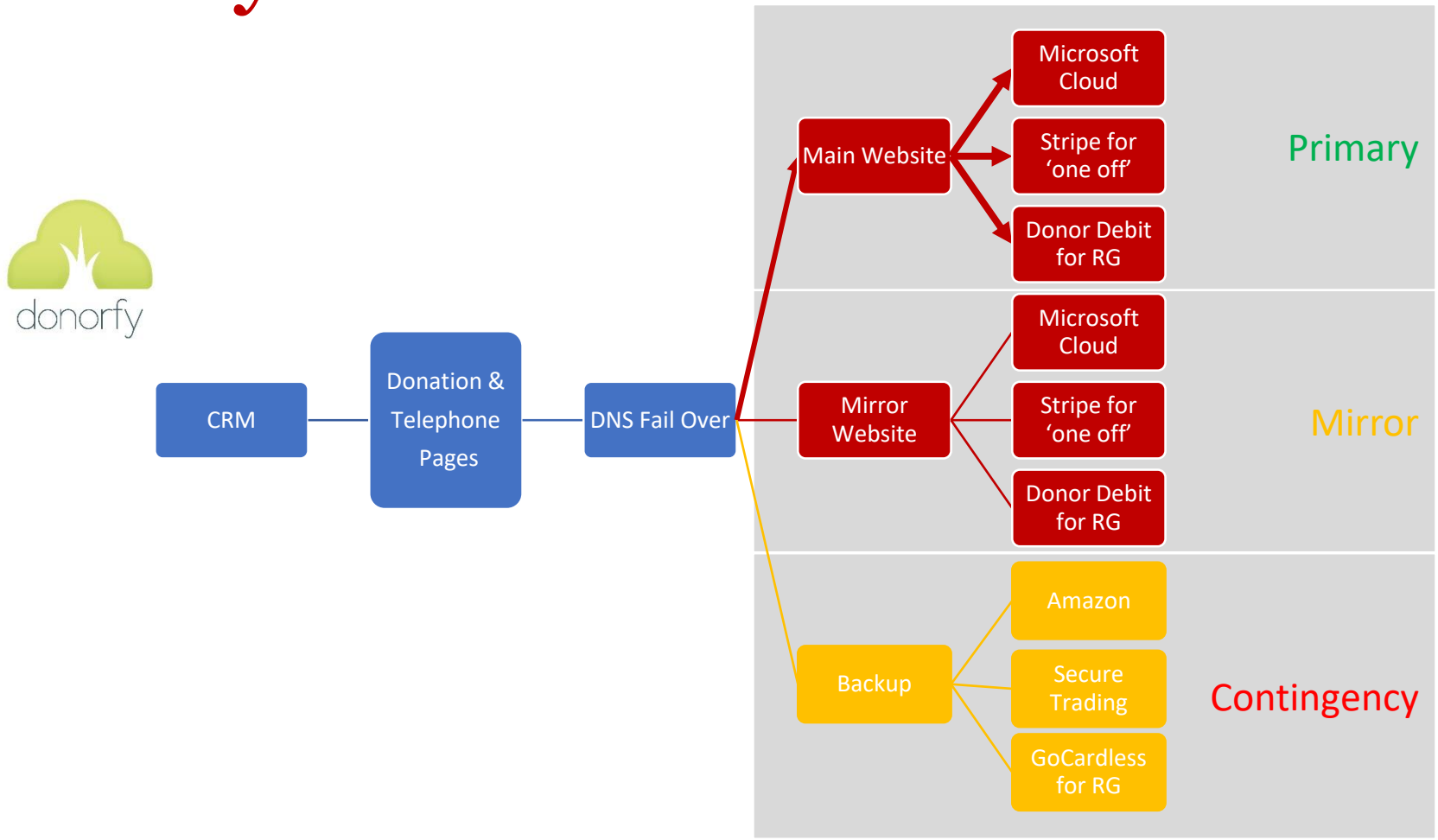
Why Donorfy?

Technical Reasons

- 100% cloud based – security and ‘the BBC’*
- Support
- Service integration – especially Stripe, MailChimp, Eventbrite, HMRC, GoCardless, Just Giving
- Data analysis – link to PowerBI and Excel
- Cheque and Gift Aid scanning integration

Registered with FUNDRAISING REGULATOR
donorfy
stripe
BBC RADIO 4 CHRISTMAS APPEAL
St Martin in the Fields
90 YEARS

Donorfy


donorfy
CRM
Donation & Telephone Pages
DNS Fail Over
Main Website
Microsoft Cloud
Stripe for 'one off'
Donor Debit for RG
Primary
Mirror Website
Microsoft Cloud
Stripe for 'one off'
Donor Debit for RG
Mirror
Backup
Amazon
Secure Trading
GoCardless for RG
Contingency

Problems?

- Some processing can be slow
- Search and Lists
- Data analysis – access to data – link to PowerBI and Excel
- Can’t modify the Dashboard

Registered with FUNDRAISING REGULATOR
donorfy
stripe
BBC RADIO 4 CHRISTMAS APPEAL
St Martin in the Fields
90 YEARS

Discussion and feedback

Review and close