



CRM and cake IV

Implementing platform, open source and proprietary products

14 July 2015

 @AdaptaforNFP



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.

Programme

14.00 **Arrival and welcome**

Iain Pritchard – Adapta Consulting

Welcome to the event, introductions and overview of the agenda for the afternoon.

14:15 **The state of the market**

Various

A brief overview of the state of CRM in the sector, with a particular look at current sector trends.

15:00 **Case studies – Implementation experiences**

Short stories from speakers

15:45 **Discussion and feedback**

All

A round table discussion and feedback.

16.30- **Review and close**

17.00 **Iain Pritchard – Adapta Consulting**

State of the Market



... a brief overview of the state of CRM in the sector, with a particular look at the developing positions of package products, platform solutions and open source.

A guide to CRM systems for not-for-profit organisations

Guide to CRM systems for not-for-profit organisations

Package name	Made by	Resold by	Notes on company
Key: Green = Membership focus; Blue = Charity focus; White = Commercial origins			
Affiliate	Redsky IT	N/A	Redsky IT was formed following a series of mergers and acquisitions. Formerly known as Ramesys, Redsky IT has also been providing solutions to professional bodies, awarding bodies, universities and public libraries for more than 30 years. The company now primarily provides software to the construction industry, supplying both construction companies and the professionals that service the industry, with customers located in the UK and worldwide
Alms.net	Westwood Forster	N/A	Westwood Forster have worked with the not-for-profit sector since 1990 and have a well-established client base
Aptify	Aptify Inc	Pangaea Consulting	Pangaea is a UK reseller of Aptify, and has supported organisations in the not-for-profit and commercial sectors achieve dramatic business improvements in their use of Information Systems
Ascent CRM	Ciber UK	N/A	CIBER is an international systems integration agency supplying solutions to customers mainly in the private and public sectors
Blackbaud Enterprise CRM	Blackbaud	N/A	Blackbaud is a leading global provider of software and related services designed specifically for not-for-profit organisations. Founded in 1981, with 22,000+ customers, in nearly every segment of the not-for-profit market, 1,000+ employees in five countries, Offices in London, Glasgow, and Dublin. In January 2012, Blackbaud announced that it was acquiring Convio Inc, a leading provider of cloud-based CRM software, which has over 1,500 customers in the US, Canada and the UK, including 29 of the top 50 US charities, and 430 staff across the US and UK
Common Ground (discontinued)	Blackbaud (having acquired Convio in early 2012)	N/A	Convio was founded in November 1999 using venture capital funding led by Austin Ventures, and was acquired by Blackbaud in early 2012. The company had headquarters in Austin, TX and now has an office in London. Convio has over 1,500 customers in the US, Canada and the UK, including 29 of the top 50 US charities, and 430 staff across the US and UK. Convio provides internet marketing and business management applications tailored specifically for not-for-profit organisations, and virtually all of its customers are charities, educational establishments, and political advocacy groups. In 2007, Convio acquired GetActive Software, then the second largest eCRM and CMS provider for not-for-profit organisations in the USA. In July 2011, Convio acquired Baigent Digital LLC (Baigent), a provider of digital strategy, design, technology implementation and online fundraising solutions to charities in the UK. Baigent had been working in the UK charity sector for over 10 years, with clients including Cancer Research UK, Action for Children and UNICEF UK. In January 2012, Blackbaud announced that it was acquiring Convio Inc, valuing the company at \$275m
CivCRM	CivCRM	MTL Software Solutions Ltd	CivCRM is created by an open source community coordinated by CivCRM LLC, Miller Technology Ltd (MTL) is a commercial organisation which has supplied membership and contact management (CRM) systems to the not for profit for approximately 30 years and which now contributes to the CivCRM open source community and acts as implementation consultants.

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Notes on system	Illustrative clients	Contact email	Tel	Website
Affiliate is Redsky IT's flagship product for the not-for-profit sector. It is an integrated set of management solutions for membership organisations, awarding bodies, federations, institutes and associations. It comprises a range of application modules supported by a suite of web services and self-service solutions that help organisations improve member retention and recruitment	NCC Education, Chartered Institute of Public Finance and Accountancy (CIPFA), Institute of Chartered Accountants in Ireland (ICAI), Institute of Sales and Marketing Management (ISMM)	sales@redskyt.com	01788 822133	www.redskyt.com
Alms.net is a fundraising, membership and grants solution. It allows organisations to adopt Best Practice methods quickly and effectively for each business process stage	CBM UK (formerly Christian Blind Mission) the overseas disability charity, UNICEF UK, Mencap	info@westwood-forster.co.uk	0203 189 4100	www.westwood-forster.co.uk
Aptify provides a wide variety of business functionality in a single package, and is supplied with a comprehensive set of modules including workflow management and business intelligence tools offering 200 reports out-of-the-box	Universities & Colleges Association, British Heart Foundation, Elm Pentecostal Church	info@pangaea-consulting.com	01452 332789	www.pangaea-consulting.com
Ascent CRM for Charities & Associations is a .NET based solution that allows charities to manage and interact with all of their supporters more efficiently and effectively	Orfam GB, Help the Hospices, Samaritans, Migrane Trust, Christian Aid	enquiries@ciber.co.uk	0870 000 0204	www.ciber.co.uk industrycharities
Blackbaud CRM is a flexible, scalable and secure Customer Relationship Management (CRM) solution	Breast Cancer Care, British Heart Foundation, Oxford University, Greenpeace International, Jewish Child's Day, Children's Hospice South West, Highland Hospice	sales@blackbaud.co.uk	0845 658 8590	www.blackbaud.co.uk
Convio Common Ground CRM provides small and mid-sized not-for-profits with a simple, easy to use, complete and affordable system that combines fundraising operations and constituent information. Common Ground CRM offers a complete social fundraising solution, fully integrating your supporter database, peer-to-peer fundraising efforts and providing exposure that via social media. All of Convio's software runs in the cloud, which the company claims is the most cost effective and efficient way for not-for-profits to leverage technology to transform processes and generate revenue. Following Blackbaud's acquisition of Convio, it was announced in August 2012 that the Common Ground platform would soon be discontinued.	Catholic Charities of the Archdiocese of Miami, The Greenway Foundation, All Hands Volunteers, Humane Society of Williamson County	www.commongroundform.com/uk/local.html	+1 888 528 9501	www.commongroundform.com
CivCRM is a web-based, open source software constituent relationship management and fundraising solution. CivCRM is web-based, internationalised, and designed specifically to meet the needs of advocacy, non-profit and non-governmental groups	Amnesty International, American Friends Service Committee, Technop, Conservation Fund, Democrats Abroad, Frontline Defenders, Wikipedia	forum.civcrm.org	620 7943 4400	civcrm.org

The State of the Market

thank 

iMIS

CIVICRM 

STRATUM
Black

 Harlequin
Software



 Advantage^{NFP}

 mti
keeping you in touch
SodilitaS


Microsoft
Dynamics™ CRM

ProTech



 TSG tribe
Membership Management



 Integra_{NG}

Member Strategy

alms  NET

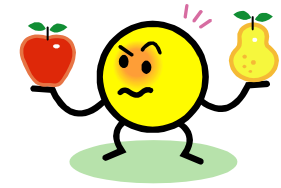
Donor Strategy

CARE_{NG}

 donorflex10
on target

 oomi
CRM for Anyone Anywhere

Six ways to look at the choices



1. Back-end or Front-end?
2. Product or Platform?
3. Large or small?
4. Global or local?
5. Fundraising or membership?
6. Salesforce or Microsoft?

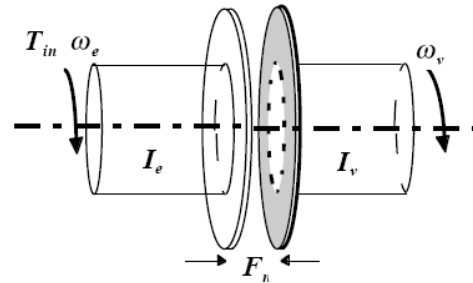


Six ways to look at the choices

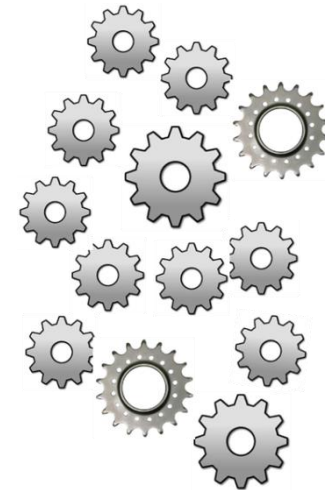
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IT vs Digital

IT



Digital

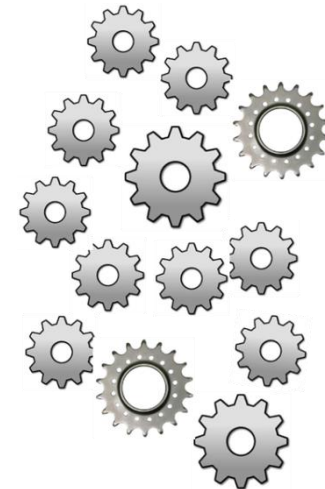


IT vs Digital

IT



Digital

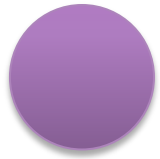


Six ways to look at the choices

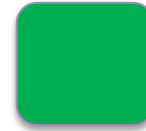


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Product or Platform?

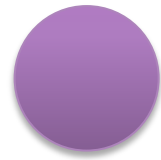


Product



Platform





Product?

Tailored solution?



Redundant material?





Platform?

Commodity software?

DIY?



Examples



Product

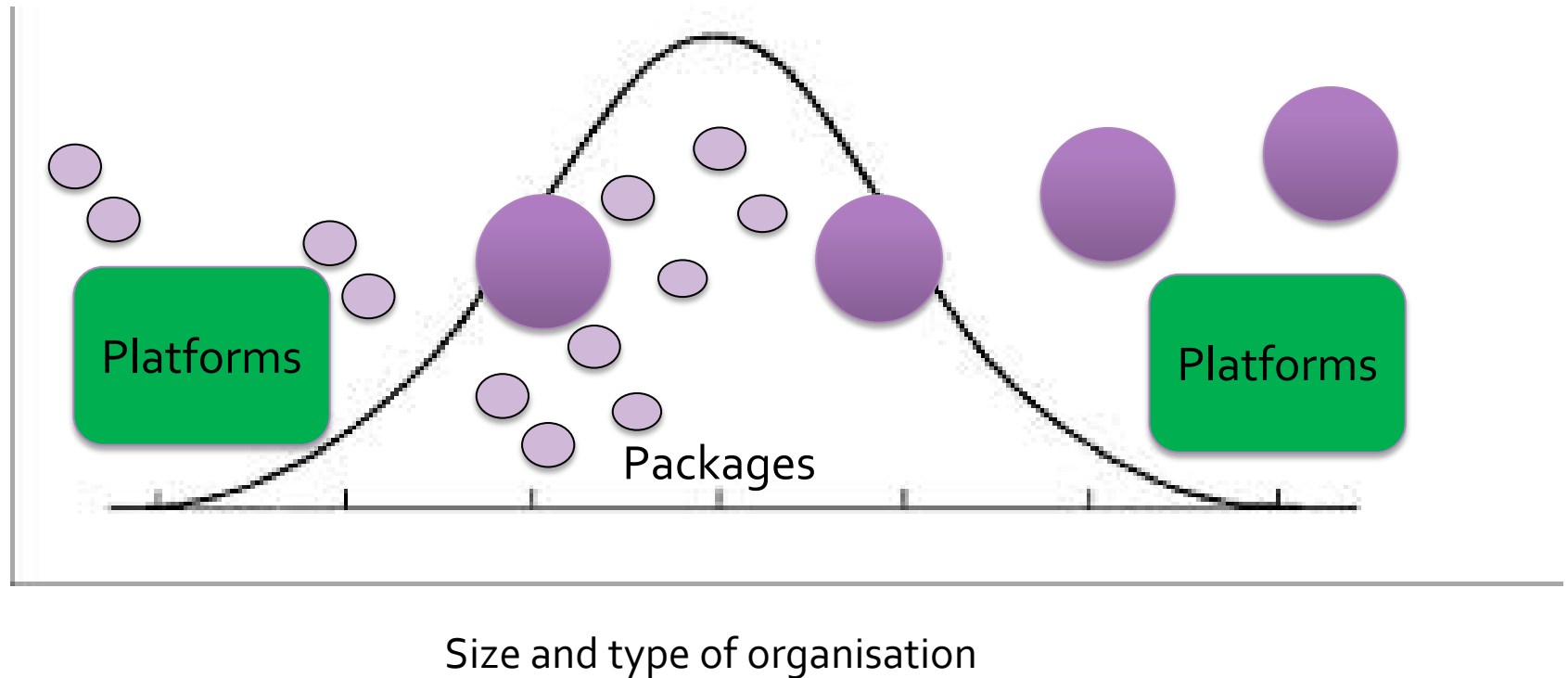
- Access Group
- Advanced Computer Software
- APT
- ASI
- Blackbaud
- Centrepoint
- Donorflex
- Millertech (MTL)
- Redbourn
- Westwood Forster



Platform

- Microsoft
 - Alpha People
 - Ciber
 - Excitation
 - M-Hance
 - Pythagoras
 - Silver Bear
- Salesforce
 - Atlantic Technologies (Fonteva)
 - Brightgen
 - Cloud Symphony
 - Give Clarity
 - Purple Vision

Product or platform?



Six ways to look at the choices

1. Back-end or Front-end?
2. Product or Platform?
3. Large or small?
4. Global or local?
5. Fundraising or membership?
6. Salesforce or Microsoft?

Product suppliers



“Larger”

- Access Group:
 - ThankQ
 -
- Advanced Computer Software
 - Care
 - Integra
 - Donor Strategy
 - ...
- Blackbaud
 - The Raisers Edge
 - CRM
 - Luminate
 - eTarget
 -

“Smaller”

- APT
 - Stratum Black
- ASI
 - iMIS
 - (Progress)
- MTL
 - Sodalitas
 - Ariadne
 - CiviCRM
- Protech
 - Pro 8
- Redbourn
 - Advantage NfP

Six ways to look at the choices



1. Back-end or Front-end?
2. Product or Platform?
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5. Fundraising or membership?
6. Salesforce or Microsoft?

Global or Local



- ASI
- Blackbaud
- Microsoft
- Salesforce



UK

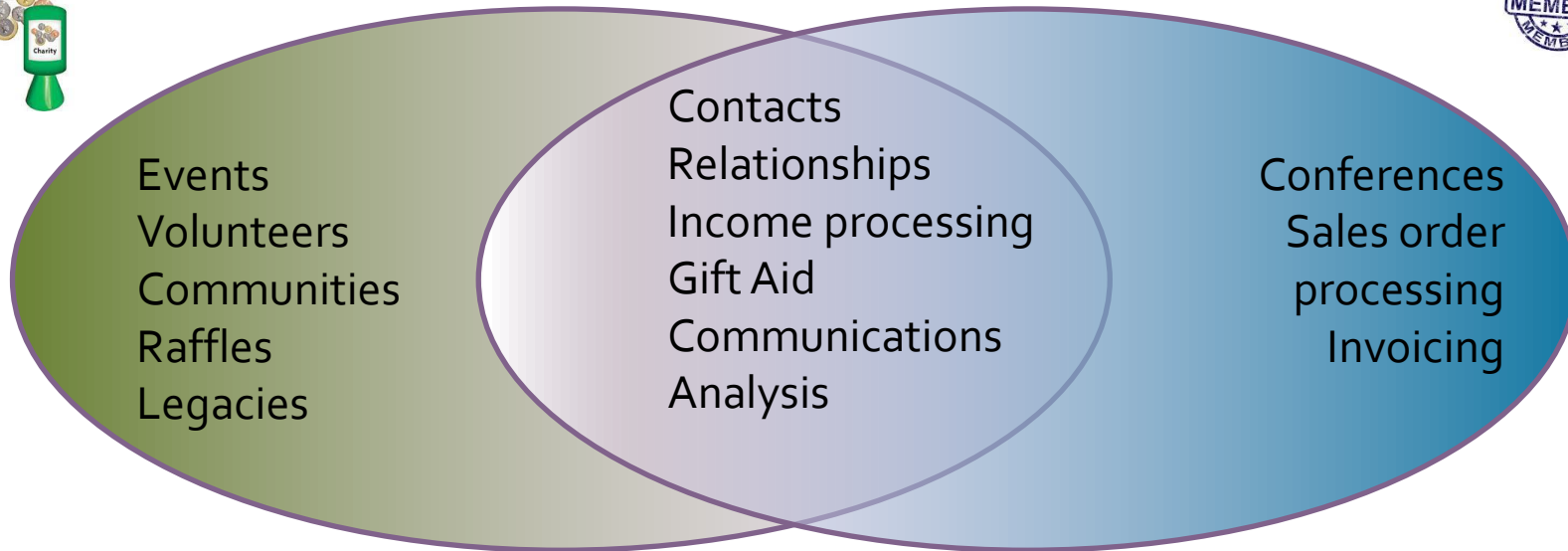
- Access
- Advanced
- Centrepont
- Donorflex
- Harlequin
- Protech
- Redbourn
- Westwood Forster

Six ways to look at the choices



1. Back-end or Front-end?
2. Product or Platform?
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4. Global or local?
5. Fundraising or membership?
6. Salesforce or Microsoft?

Fundraising or Membership..?



Fundraising or Membership



Fundraising



Membership

	Advantage	
	Alms	iMIS
DonorFlex	Care	Integra
Donor Strategy	Civi	Member Strategy
Raisers Edge	Harlequin	Pro 8
ThankQ	Oomi	Stratum
	ThankQ	Tribe

Six ways to look at the choices



1. Back-end or Front-end?
2. Product or Platform?
3. Large or small?
4. Global or local?
5. Fundraising or membership?
6. **Salesforce or Microsoft?**

Salesforce



The image displays four overlapping screenshots of the Salesforce CRM interface, illustrating its capabilities in managing customer relationships and data.

- Top Screenshot:** Shows a contact profile for "Ms. Lois Lane". It includes a navigation menu (Home, Contacts, Organizations, Campaigns, Opportunities & Gifts, Regular Giving, Batch Entries, Gift Aid Claims, Reports, Dashboards, Settings, Memberships) and a "Contact Detail" section with tabs for "Add", "Edit", "Share", "Sharing", "Account History", "Search Opportunity", "All Available News", "Send Survey", and "View SMS". A "Living Statistics" section features a pie chart and a line graph.
- Bottom-Left Screenshot:** Shows a dashboard for "David Jones" (Wednesday, 20 February 2013). It includes a "Dashboard" section with a "Value by Location" bar chart and a "Grants Received This Year" gauge chart showing a target of £75,000.00 and a current value of £42,000.00 (56%). A "My Tasks" section is also visible.
- Bottom-Right Screenshot:** Shows a "Segment Builder" interface. It features a central pie chart and several tool icons. A list of segments is displayed below, including "Details Over \$1,000 This Year" and "Details Over \$500 This Year".
- Left Screenshot:** Shows a sidebar menu with various navigation options such as "Contact Record", "Segment Builder", "Regular Giving", "Quick Cap Search", "Report Example", "PULSE?", "Relationships", "Campaign Hierarchy", "Gift Aid", "Donation Page 5/6", "Quick Opportunity", "Gift Aid Claim", "Email Direct Processing", "Example Form-Input", "Direct Income Application", "Membership Record", "Opportunity Types", "Relationship Photo", and "Settings Page".

Microsoft



The screenshot displays the Microsoft Dynamics CRM interface within an Outlook window. The top ribbon is set to the 'Organisations' tab, featuring various action buttons such as 'Activate', 'Deactivate', 'Merge', 'Create Invoice', 'Send Direct Email', 'Add to Marketing List', 'Assign', 'Share', 'Copy a Link', 'Email a Link', 'Connect', 'Follow', and 'Unfollow'. There are also sections for 'Process' (Run Workflow, Start Dialog) and 'Data' (Run Report, Export to Excel, Import Data, Advanced Find). The left-hand navigation pane shows a tree view with categories like 'Processes', 'System', 'Time and Billing', 'Workplace', 'Adapta', 'Clients', 'Organisations', 'Contacts', 'Individuals', 'Extensions', 'My Work', 'Prospects', 'Leads', and 'Opportunities'. The main content area is divided into three tabs: 'Clients', '06 Active Organisations', and 'Inactive Accounts'. The 'Clients' tab is active, showing a search bar and a table of client records. The table has columns for 'ACCOUNT NAME', 'MAIN PHONE', 'ADDRESS 1: STRE...', 'ADDRESS 1: CITY', 'WEBSITE', 'PRIMARY CONTACT', 'EMAIL (PRIMARY ...)', 'CATEGORY', 'CHARITY IT LEADER', and 'CRM'. The 'Caterham School' record is selected and highlighted. Below the table, the details for 'Caterham School' are shown, including 'Telephone', 'Modified By: [Jain Pritchard](#)', and 'Modified On: 16/08/2013'. The bottom status bar indicates 'Done', 'UPDATING Adapta.', and the system time '13:43 16/07/2014'.

ACCOUNT NAME	MAIN PHONE	ADDRESS 1: STRE...	ADDRESS 1: CITY	WEBSITE	PRIMARY CONTACT	EMAIL (PRIMARY ...)	CATEGORY	CHARITY IT LEADER	CRM
Caterham School				http://www.cate...					
Catholic Truth Society				http://www.ctsb...					
Cats Protection				http://www.cats...					
Cavendish Cancer Care				http://www.cavc...					
CAYSH				http://www.cays...					

Salesforce or Microsoft



Microsoft

- AppiChar
- Atlantic Technologies
- Cloud Symphony
- Brightgen

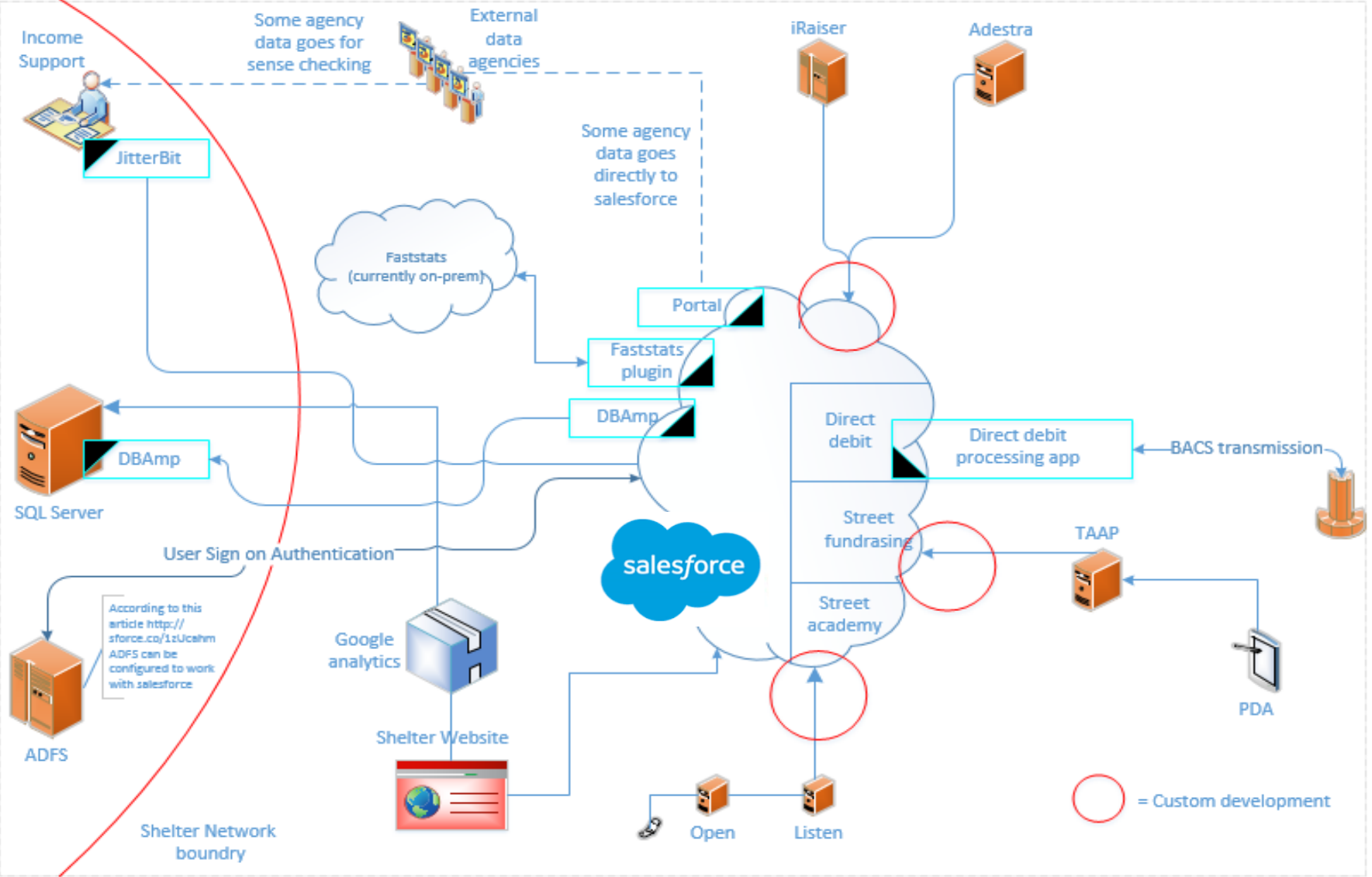
- Excitation
- Pythagoras
- Silver Bear
- Alpha People
- M-Hance
- Ciber

Stuart McSkimming, Head of IT
Paul McMullan, IT Project Manager

Shelter



Raiser's Edge & Friends = Salesforce Project



Fundraising breakdown... what are we using Salesforce for?

1. Contact Management

2. Interaction Tracking

3. Donation Processing

4. Financial Processing

5. Campaign Management

6. Events Management

7. Prospect Management

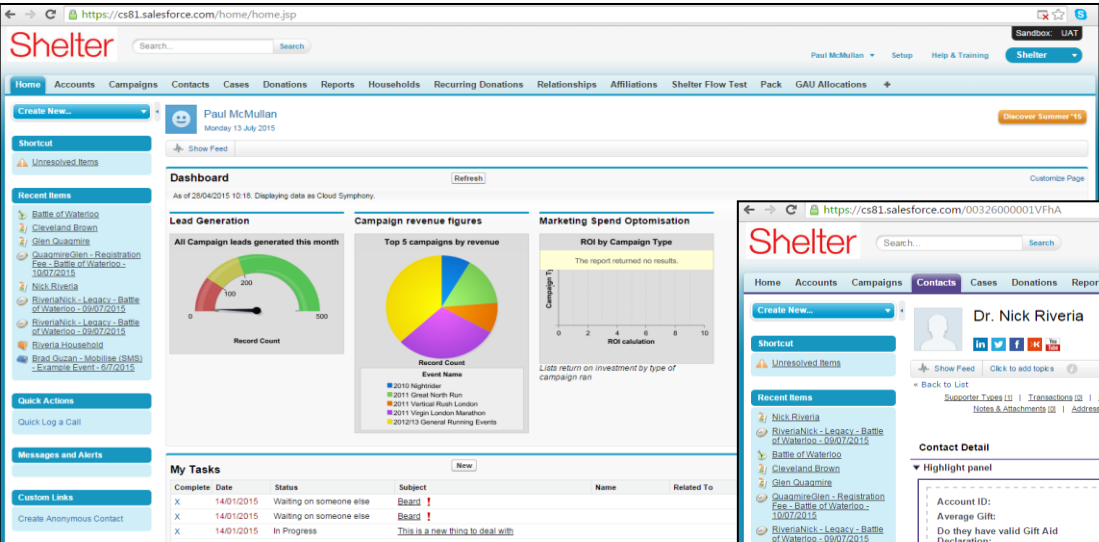
8. Street Fundraising

9. Imports & Exports

10. Data Migration

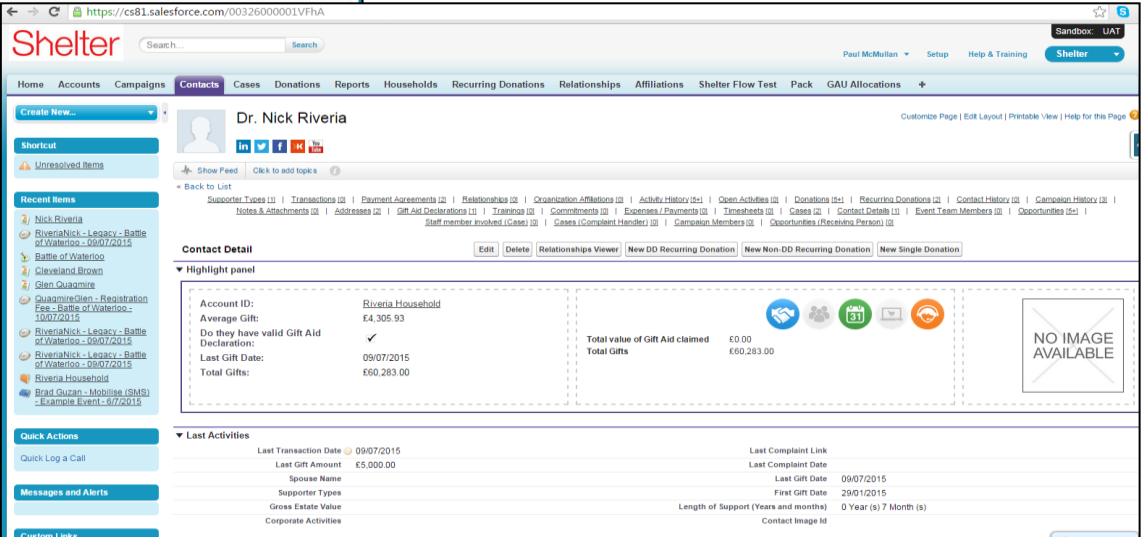
11. Reporting

Salesforce @ Shelter



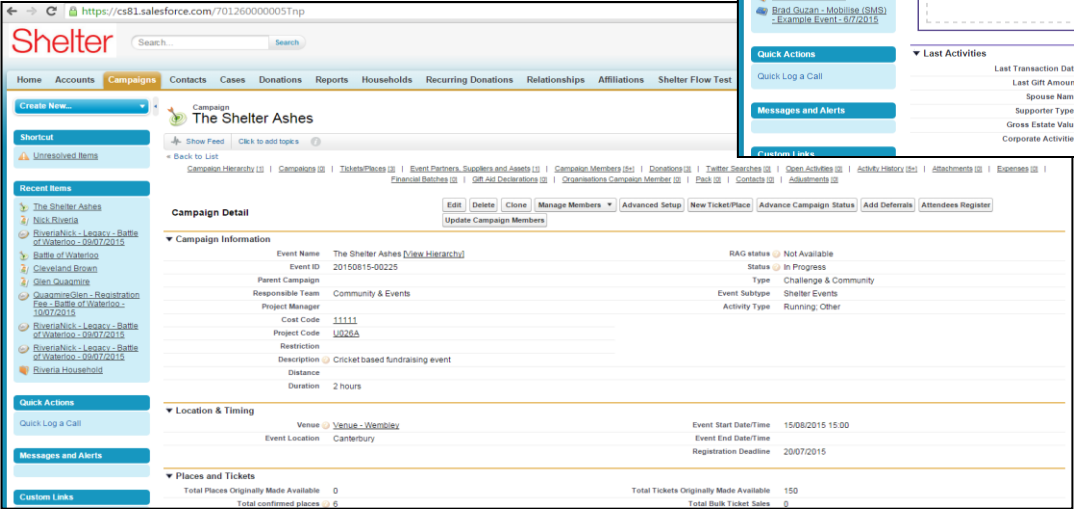
Dashboard for Paul McMullan (Monday 13 July 2015). The dashboard includes three main charts: 'All Campaign leads generated this month' (a gauge chart showing a record count of approximately 200), 'Campaign revenue figures' (a pie chart showing the top 5 campaigns by revenue), and 'Marketing Spend Optimisation' (a line chart showing ROI by Campaign Type). Below the charts is a 'My Tasks' table with columns for Complete, Date, Status, Subject, Name, and Related To.

Complete	Date	Status	Subject	Name	Related To
X	14/01/2015	Waiting on someone else	Black		
X	14/01/2015	Waiting on someone else	Black		
X	14/01/2015	In Progress	This is a new thing to deal with		



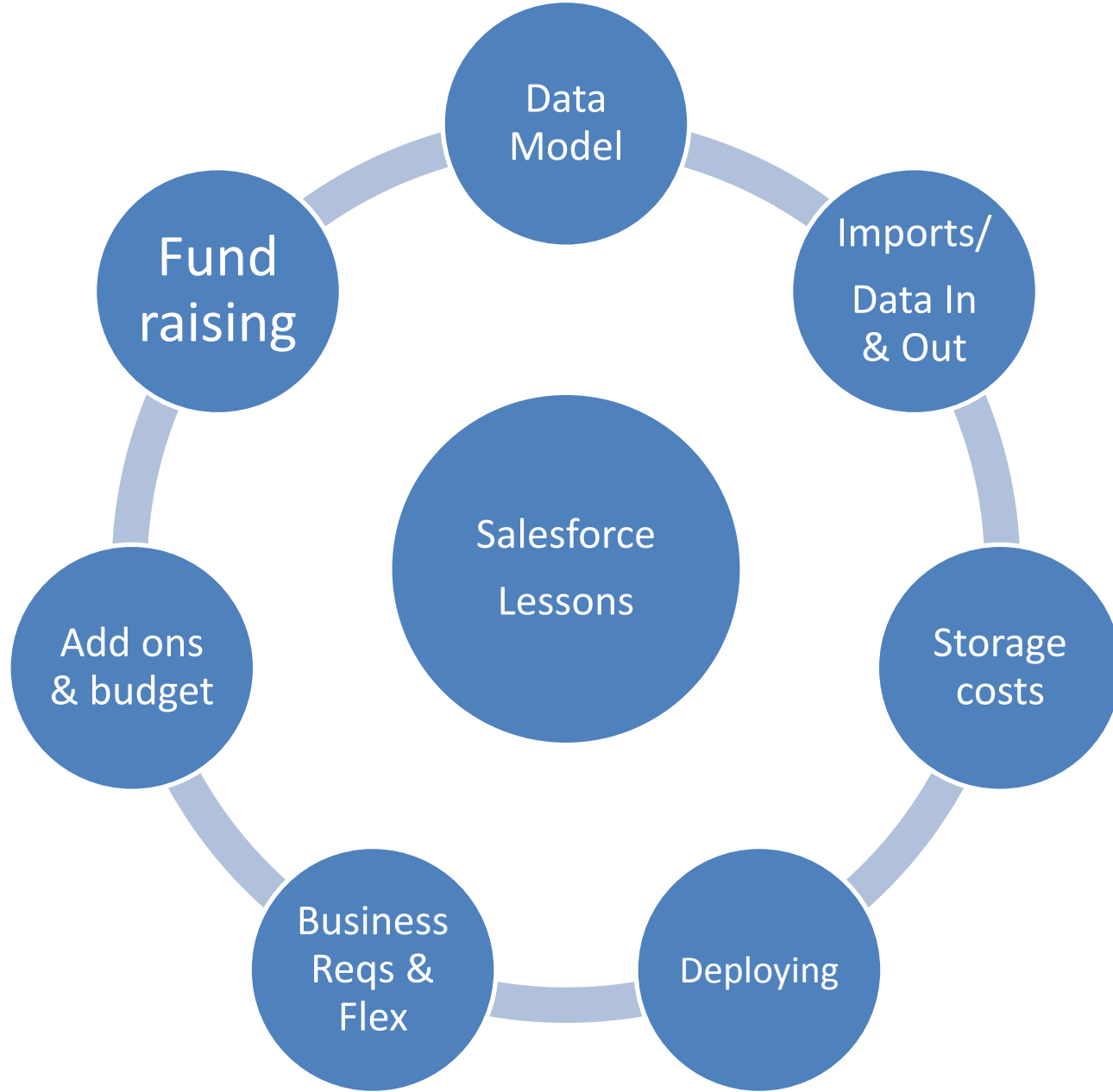
Contact profile for Dr. Nick Riveria. The profile includes a 'Highlight panel' with financial data: Account ID (Riveria Household), Average Gift (£4,305.93), Total value of Gift Aid claimed (£0.00), and Total Gifts (£60,283.00). It also shows 'Last Activities' with a table of recent transactions.

Last Transaction Date	Last Gift Amount	Last Complaint Date
09/07/2015	£5,000.00	09/07/2015

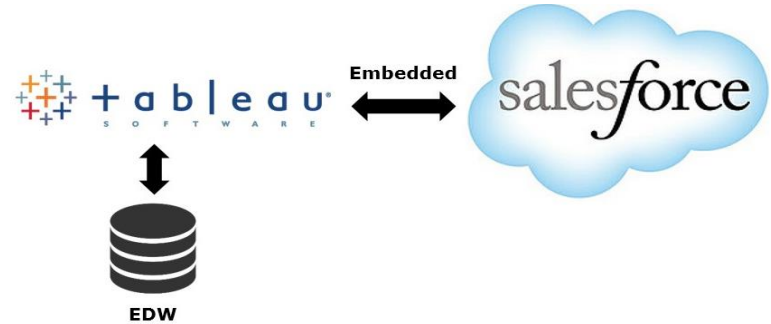


Campaign detail for 'The Shelter Ashes'. The page provides comprehensive information including Campaign Information (Event Name, ID, Parent Campaign, Responsible Team, Project Manager, Cost Code, Project Code, Restriction, Description, Distance, Duration), Location & Timing (Venue, Event Start/End Date/Time, Registration Deadline), and Places and Tickets (Total Places Originally Made Available, Total confirmed places, Total Tickets Originally Made Available, Total Bulk Ticket Sales).

Event Name	Event ID	Parent Campaign	Responsible Team	Project Manager	Cost Code	Project Code	Restriction	Description	Distance	Duration
The Shelter Ashes (New Hierarchy)	20150815-00225		Community & Events		11111	10226		Cricket based fundraising event		2 hours

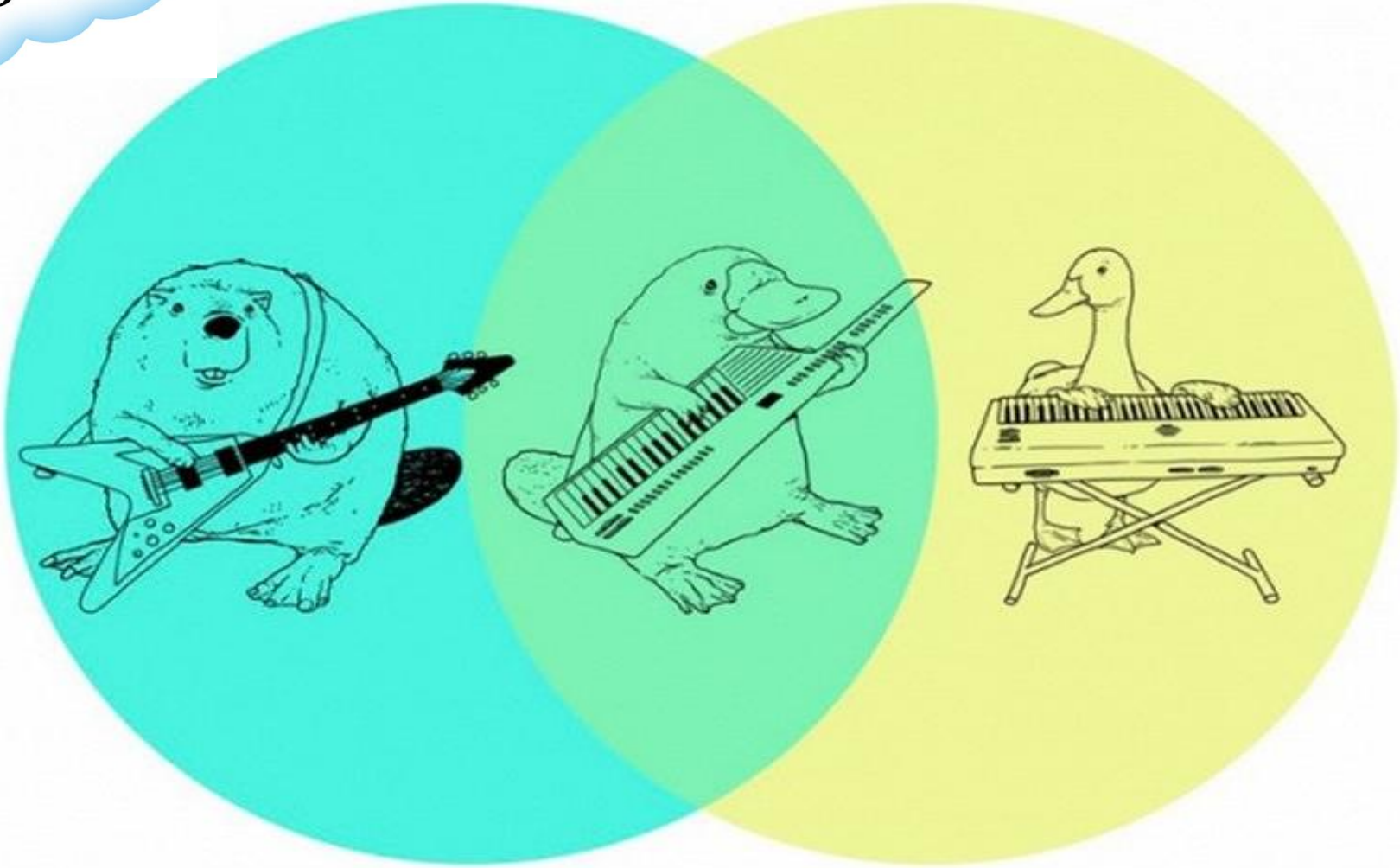


Salesforce and the future opportunities...



Conclusions

- Consider the Salesforce platform as a wider organisation tool
- Nail down your costs & mix of licences / tools / add ons
- Analyse your data model & storage / migration challenges
- Don't forget the classics – good analysis / planning / resourcing / process
- Just one more thing...



Dance UK, ADAD, YDE, NDTA journey to implement a new CRM



Fern Potter, Director of Development
Maria Falcao, General Manager



Why we decided to merge

- ▶ Save on administration and ‘back office costs’ with the money saved used for our projects and programmes
- ▶ Reduce dependency on public funders and increase revenue from growth in membership with expanded membership benefits
- ▶ Increase revenue generation and fundraising potential
- ▶ Provide a focus for funders/policy makers to connect with the dance industry

Why we needed a new CRM

- ▶ Disparate databases and contacts - needed a new system to come together and work as effectively as possible
- ▶ Contact information in a variety of formats; no formal system for account management and no identified system for recording and acknowledging relationships consistently.
- ▶ Save on administration, time and costs to develop relationships with contacts
- ▶ Improve tracking of relationships and segmentation of audiences to personalise communication channels
- ▶ Enable data-driven decision-making (DDD) to enhance organisational and operational efficiency and resilience and provide evidence for supporting management decisions

How we selected

Two key documents sent to long-list of suppliers to unify responses:

- ▶ **Request for Information (RFI)** for the supply of software and implementation support for a CRM system
- ▶ **Requirements Document** setting out functional requirements for a new system based our needs
 - ▶ M - **MUST** have this
 - ▶ S - **SHOULD** have this if at all possible
 - ▶ C - **COULD** have this if it does not affect anything else
 - ▶ W - **WON'T** have this time but **WOULD** like in the future

Selecting the preferred supplier

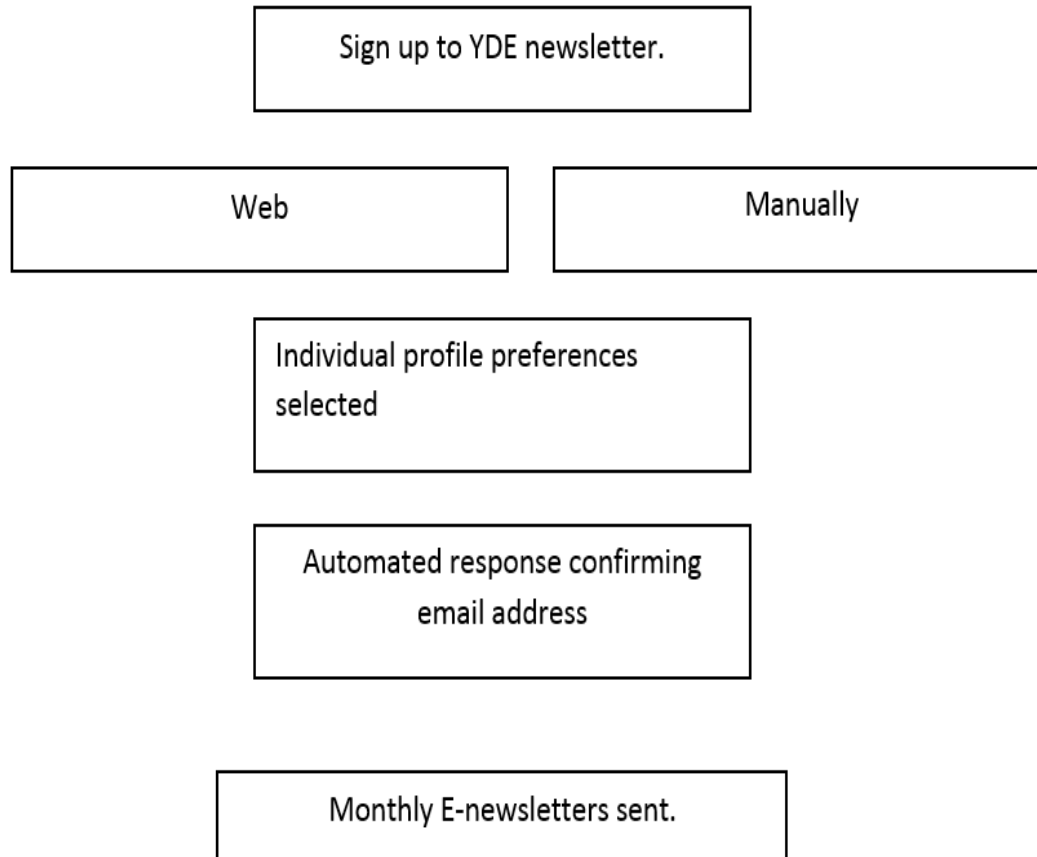
- ▶ Whittled down 8 suppliers to 4 suppliers
- ▶ Invited 4 suppliers to present to team:
 - ▶ Thank Q (Access)
 - ▶ CiviCRM (MTL Group)
 - ▶ Advantage NFP (Redbourne)
 - ▶ Salesforce (CloudSymphony)
- ▶ Whittled down 4 to 2 suppliers to prepare a fuller response and presentation (with input from our teams on areas of work)
- ▶ 2 suppliers came back to present twice
- ▶ Lead to selection of preferred CRM supplier: Thank Q (Access)
- ▶ Selection process - from July 2014 - February 2015

Starting the implementation process

- ▶ To understand what needs to be changed within the system - important to understand what the system can do once installed
- ▶ Divide and conquer:
 - ▶ one member of staff to oversee the whole project
 - ▶ key members of staff to be key contacts for specific parts of the project
- ▶ Key contacts created flowcharts clarifying current processes
- ▶ One on one meetings between overseer and each key contact
- ▶ All key staff trained on the system

Examples of Flowcharts

Flow Charts - Newsletter



Examples of Flowcharts

HDP CRM workflow - Practitioners Directory

Applications:

- ▶ New member/ existing member wants to be listed on practitioners directory
- ▶ Tab/ page within database to fill in interactive application form
 - ▶ *form to follow template provided*
- ▶ Upload feature allows individual to upload scans of documents such as qualifications, public liability insurance, references, etc.
- ▶ Drop down list of approved professional organisations, must select membership to at least one
- ▶ Date of expiry for insurance and professional organisation membership must be entered (2 separate boxes)
- ▶ Form is submitted
- ▶ Application Review:
 - ▶ Automatic notification sent to HDP managers that a new application has been submitted for their review
 - ▶ HDP managers review online application and select 'approve', 'reject', or 'request further information' (a comment box should also be available for any necessary annotation - which remains private)

Specification Workshops and Document

- ▶ Workshops
 - ▶ 2 days
 - ▶ With Project Manager and Developer from Access ThankQ
- ▶ Purpose - to identify any parts of the system that need to be customized to serve our needs.
- ▶ For each module / section:
 - ▶ Included key contact for that section
 - ▶ Went through flowcharts and clarified our needs
 - ▶ Listened to Developer's thoughts and ideas to come up with simplest solution
- ▶ Specifications Document

Approving the specs

- ▶ Currently going through this process
- ▶ For each area of operation:
 - ▶ Compare Specs Document with the flowchart and notes taken during workshop
 - ▶ Go through the suggested changes or modules with key contact, looking at the system whilst doing so, trying out suggestions
- ▶ Be detailed - really go through - point by point
- ▶ Keep copious notes throughout the process
- ▶ Anything agreed verbally should be put in writing on an email so no one forgets what's agreed
- ▶ Feedback to ThankQ about changes that need to be made

The Future

- ▶ ThankQ to update Specs document
- ▶ Once approved, a minimum of two weeks to develop the changes
- ▶ Test phase
- ▶ Data Import
- ▶ Integration with Website

Discussion and feedback



Review and close