



CRM and Cake III

Iain Pritchard

9 September 2014



#CRMsharedlearning

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 the developing positions of package products, platform solutions and open source.
- 15:00 **Recipes for CRM success (and failure)**
Short stories from charity speakers
Short (confidential) case studies in which speakers will share experiences and opinions and learning from CRM and related systems choices.
- 15:45 **Discussion and feedback**
All
A round table discussion and feedback.
- 16.30-
17.00 **Review and close**
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 origin.			
Affiliate	Redsky IT	N/A	Redsky IT was formed following a series of mergers and acquisitions. Formerly known as Ramseys, 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, 1,900+ 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@redskyit.com	01788 822133	www.redskyit.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. It has	CBM UK (formerly Christian Blind Mission) the overseas disability charity, UNICEF UK, Mencap	info@westwoodforster.co.uk	0203 189 4100	www.westwoodforster.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 Information Association, British Heart Foundation, Elm Pentecostal Church	info@pangaeaconsulting.com	01452 332789	www.pangaeaconsulting.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, Migraine Trust, Christian Aid	enquiry@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, 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.	Catholic Charities of the Archdiocese of Miami; The Greenway Foundation; All Hands Volunteers; Humane Society of Williamson County	www.commongroundform.com/talk-local.html	+1 888 528 9501	www.commongroundform.com
Following Blackbaud's acquisition of Convio, it was announced in August 2012 that the Common Ground platform would soon be discontinued.				
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

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The State of the Market

thankQ

iMIS

CIVICRM 


ProTech

TSG **tribe**
Membership Management

 Advantage^{NFP}

STRATUM
Black

 mtl
keeping you in touch


Microsoft®
Dynamics™ CRM

 RE

Sodilita
S

Integra_{NG}

Member Strategy

 salesforce

alms  NET

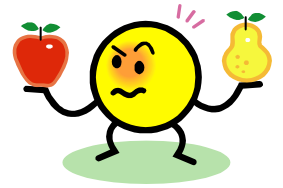
Donor Strategy

CARE_{NG}

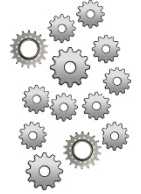
donorflex10
.....on target.....

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

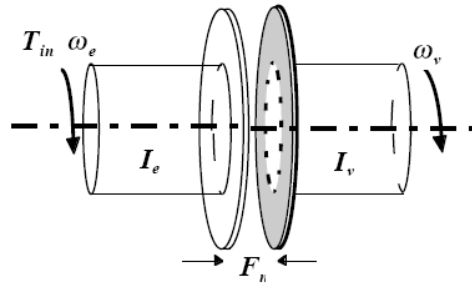
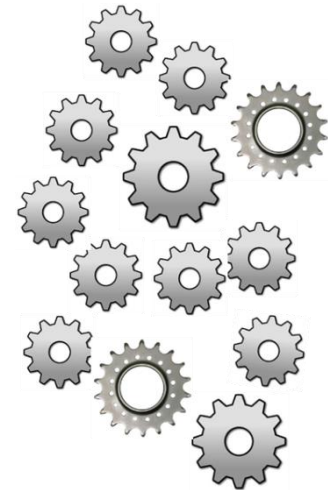
1. Back-end or Front-end?
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IT vs Digital

IT



Digital

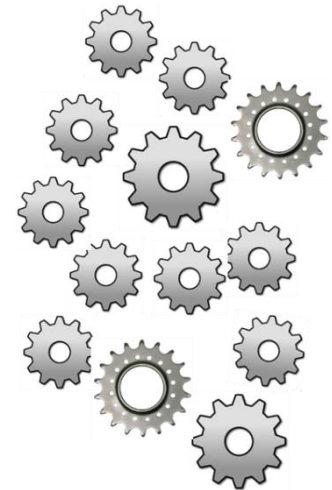


IT vs Digital

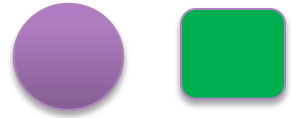
IT



Digital

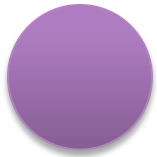


Six ways to look at the choices



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Product or Platform?

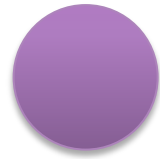


Product



Platform





Product?

Tailored solution?



Redundant material?





Platform?

Commodity software?



DIY?



Examples



Product

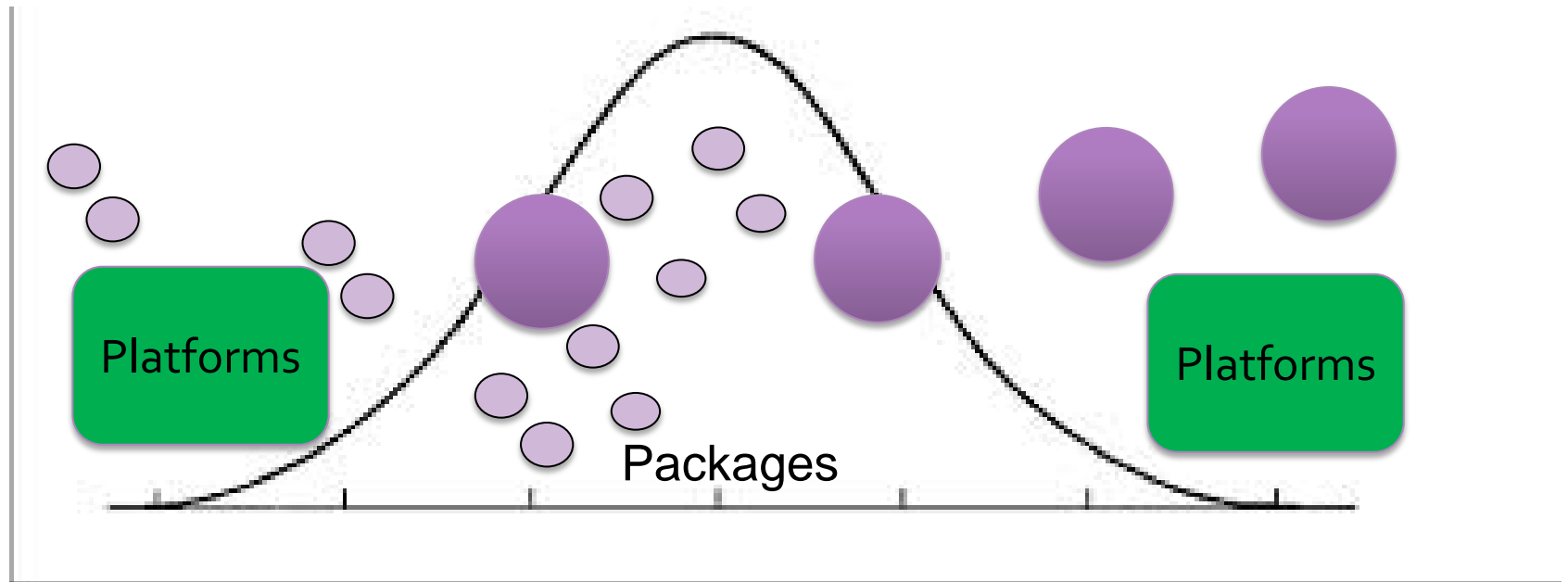
- Access Group
- Advanced Computer Software
- APT
- ASI
- Blackbaud
- Centrepont
- Donorflex
- Millertech (MTL)
- Redbourn
- Westwood Forster



Platform

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

Product or platform?



Size and type of organisation

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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6. Salesforce or Microsoft?

Global or Local



US/Global

- ASI
- Blackbaud
- Microsoft
- Salesforce



UK

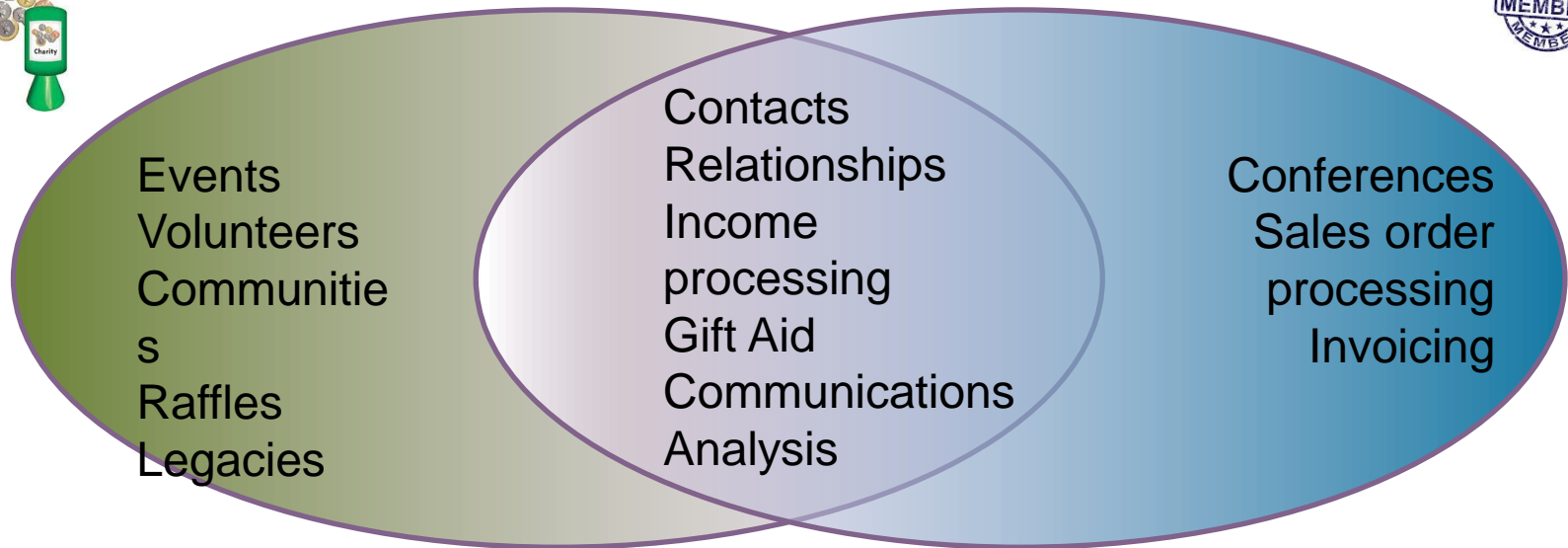
- Access
- Advanced
- Donorflex
- Protech
- Redbourn
- Westwood Forster

Six ways to look at the choices



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

Fundraising or Membership..?



Fundraising or Membership



Fundraising



Membership

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

Six ways to look at the choices



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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 with options like "Home", "Organizations", "Campaigns", and "Opportunities & Gifts". The main content area displays contact details, a "Living Statistics" section with a pie chart, and a "Recent Activity" section with a line graph.
- Middle-Left Screenshot:** Shows a contact profile for "David Jones". It features a "Dashboard" section with a bar chart titled "Value by Location" and a "Grants Received This Year" section with a gauge chart showing progress against a target of £75,000.00 (45% complete).
- Middle-Right Screenshot:** Shows a "Segment Builder" interface. It includes a circular diagram for segment selection and a list of actions such as "Build & prioritize unlimited segments", "A/B testing, debugging, segment-chaining", and "Export tools to get marketing data out easily".
- Bottom Screenshot:** Shows a table of reports or campaigns. The table has columns for "Action", "Name / Request Description", "Engagement (Link to Campaign)", "Priority", "Contacts", "A % / B %", and "Status".

Microsoft



The screenshot displays the Microsoft Dynamics CRM interface. The top navigation bar includes 'FILE', 'Organisations', 'View', 'Charts', 'Add', 'Customize', and 'SENDLATER'. The ribbon contains various action groups: 'Records' (New, Edit, Activate, Deactivate, Delete, Merge), 'Collaborate' (Share, Copy a Link, Email a Link, Connect, Follow, Unfollow), 'Process' (Run Workflow, Start Dialog), 'Data' (Run Report, Export to Excel, Import Data, Advanced Find), and 'Help'.

The main content area shows a list of clients under the '06 Active Organisations' filter. The table below lists the clients:

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...					

Below the table, the details for 'Caterham School' are shown:

Caterham School
Telephone
Modified By [Iain Pritchard](#)
Modified On 16/08/2013

The bottom status bar shows 'Done', 'UPDATING Adapta.', and a progress indicator. The Windows taskbar at the bottom includes icons for various applications and the system tray showing the time as 13:43 on 16/07/2014.

Salesforce or Microsoft



Salesforce

- AppiChar
- Atlantic Technologies
- Cloud Symphony
- Brightgen



Microsoft

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



adapta
processes, people and technology

Thank you

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