



CRM and cake V

Implementation stories

12 July 2016



@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 CRM landscape**

Iain Pritchard – Adapta Consulting

An overview of the CRM landscape in 2016 and update on the current sector trends

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

Short stories from speakers

16:00 **Discussion and feedback**

All

A round table discussion and feedback.

16.45- **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 Ramsey's, 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.
Aptly	Aptly Inc	Pangaea Consulting	Pangaea is a UK reseller of Aptly, 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 Eindhoven. 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 GeoActive Software, then the second largest eCRM and CMS provider for not-for-profit organisations in the USA. In July 2011, Convio acquired Bagent Digital LLC (Bagent), a provider of digital strategy, design, technology implementation and online fundraising solutions to charities in the UK. Bagent had been working in the UK charity sector for over 14 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). It 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.

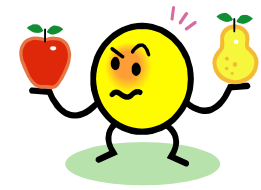
© Adapta Consulting

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 acquisition.	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 in-line.	CEM UK (formerly Christian Blind Mission) the overseas disability charity, UNICEF UK, Mencap	info@westwoodforster.co.uk	0203 189 4100	www.westwoodforster.co.uk
Aptly 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 332799	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, Migrane Trust, Christian Aid	ascent@uk.ciber.com	0870 000 0204	www.ciber.co.uk/ross@charities
Blackbaud CRM is a flexible, scalable and secure Customer Relationship Management (CRM) solution.	Breast Cancer Care, British Heart Foundation, Oxford University, Greenspace International, Jewish Child's Day, Children's Hospice South West, Highland Hospice	sales@blackbaud.co.uk	0945 650 898	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.commonground.com/contact-us.html	+1 888 528 9501	www.commonground.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 advocates, non-profit, and non-governmental groups.	Amnesty International, American Friends Service Committee, Techno, Conservation Fund, Democrats Abroad, Frontline Defenders, Wikipedia	forum.civcrm.org	020 7943 4400	civcrm.org

The State of the Market



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

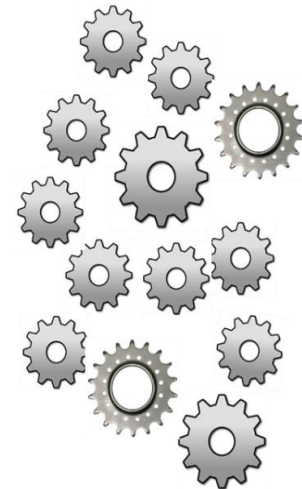
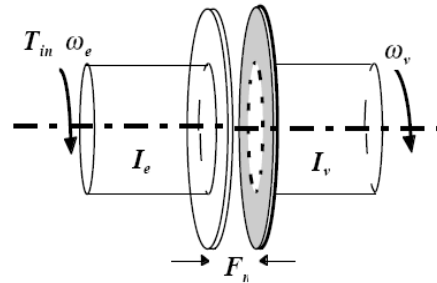
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IT vs Digital

IT



Digital

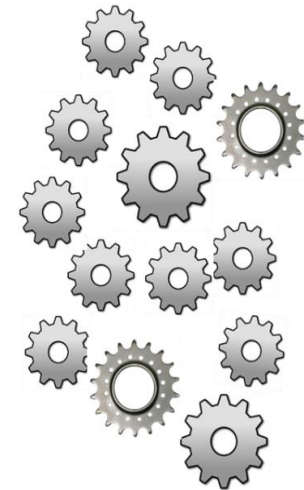


IT vs Digital

IT



Digital

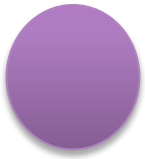


Six ways to look at the choices

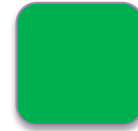


1. Back-end or Front-end?
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Product or Platform?



Product



Platform



Product?

Tailored solution?



Redundant material?





Platform?

Commodity software?

DIY?



Examples

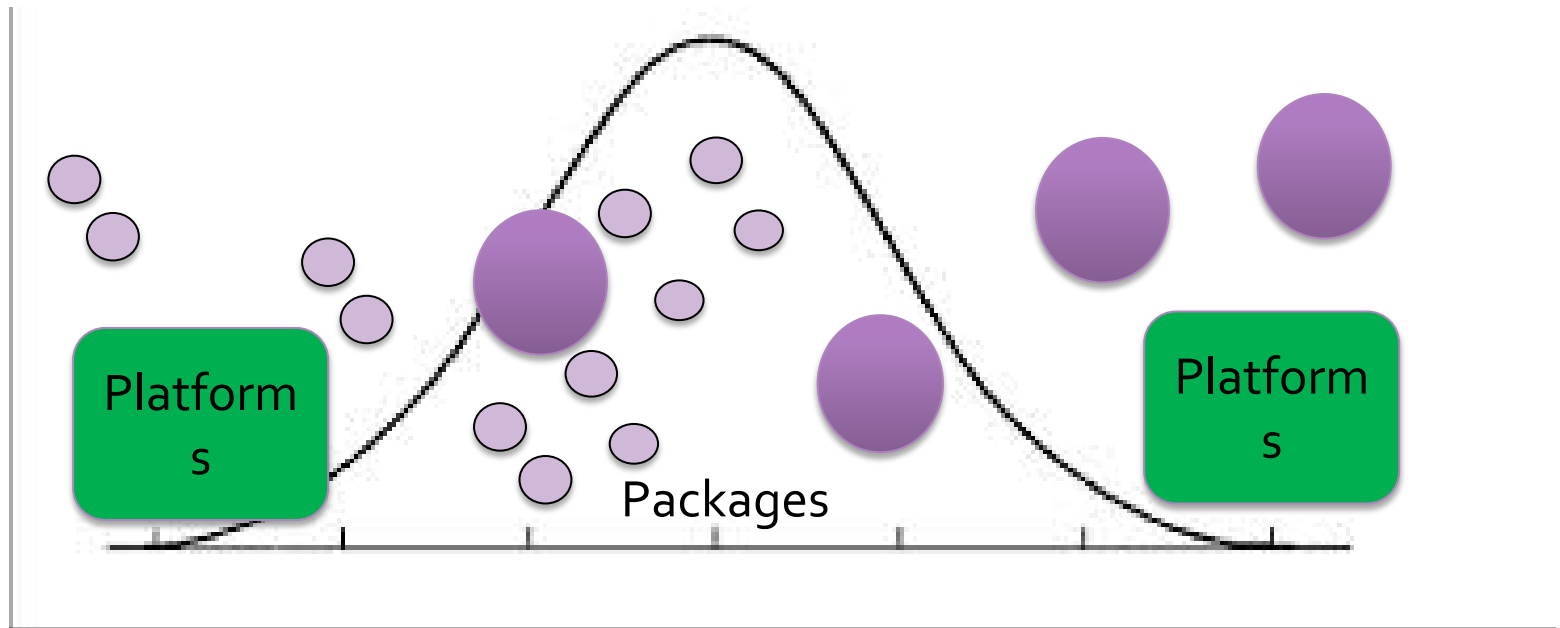


- Access Group
- Advanced Computer Software
- APT
- ASI
- Blackbaud
- Centrepont
- Donorflex
- Millertech (MTL)
- Redbourn
- Westwood Forster



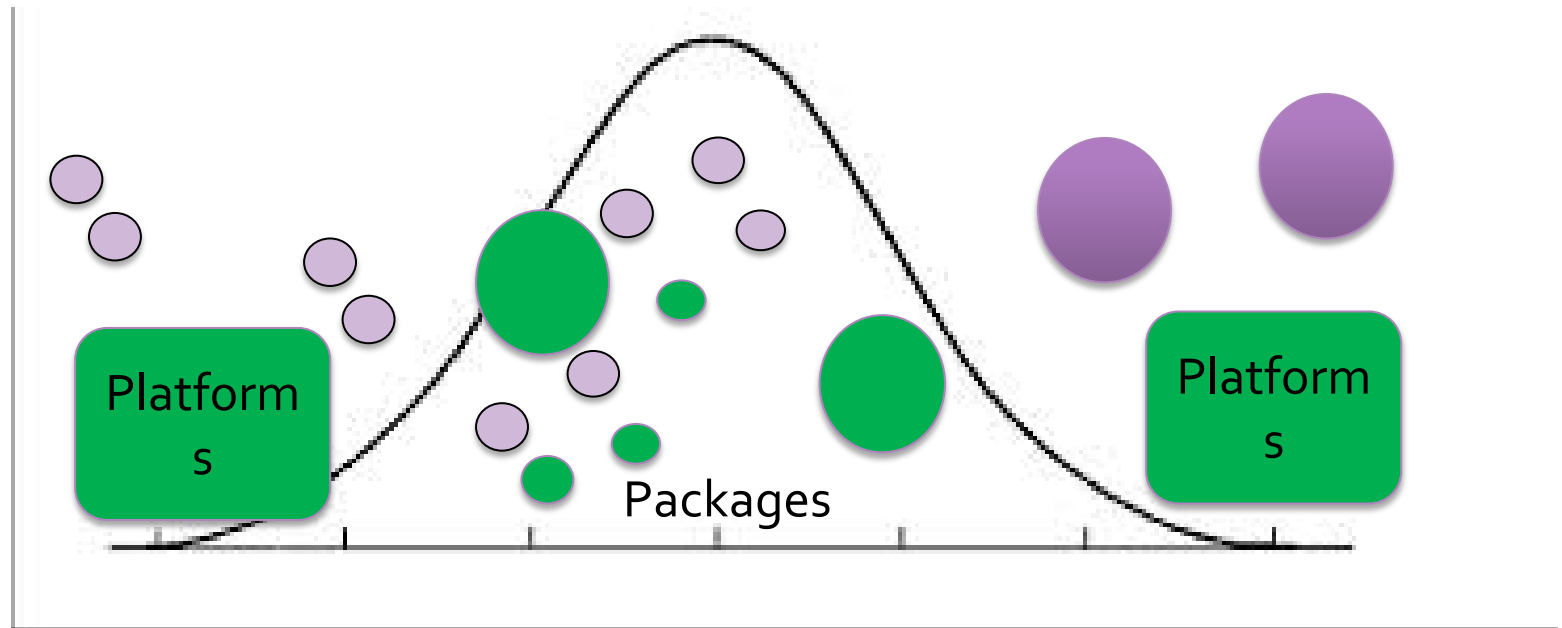
- Microsoft
 - Silver Bear
 - Alpha People
 - Excitation
 - M-Hance
 - Pythagoras
 - Ciber
- Salesforce
 - Fonteva
 - Purple Vision
 - Brightgen
 - Cloud Symphony
 - Give Clarity

Product or platform?



Size and type of organisation

Product or platform?

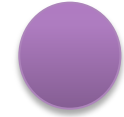


Size and type of organisation

Six ways to look at the choices

1. Back-end or Front-end?
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6. Salesforce or Microsoft?

Product suppliers



“Larger”

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

“Smaller”

- APT
 - Stratum Black
- ASI
 - iMIS
 - (Progress)
- Donorfy
- 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

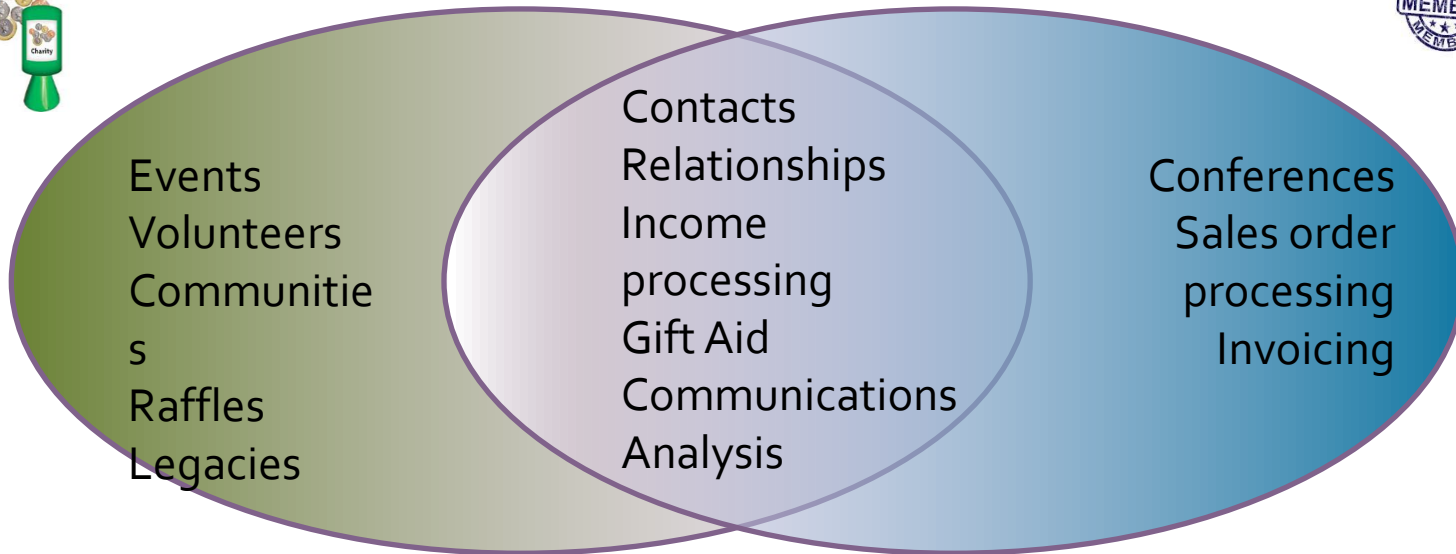
- Access
- Advanced
- Centrepont
- Donorflex
- Donorfy
- Harlequin
- Protech
- Redbourn
- Westwood Forster

Six ways to look at the choices



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

Fundraising or Membership..?



Fundraising or Membership



Fundraising



Membership

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

Six ways to look at the choices



1. Back-end or Front-end?
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6. **Salesforce or Microsoft?**

Salesforce



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

- Top Screenshot:** Shows a contact profile for "Ms. Lois Lane". It includes a navigation menu with options like "Home", "Contacts", "Organizations", "Campaigns", "Opportunities & Gifts", "Regular Giving", "Batch Entries", "Gift Aid Claims", "Reports", "Dashboards", "Support/Help Settings", and "Memberships". The main content area shows contact details, a "Giving Statistics" section with a pie chart, and a "Recent Activity" section with a line graph.
- Bottom-Left Screenshot:** Shows a "Dashboard" for "David Jones" (last updated on 20 February 2012). It features a "Value by Location" bar chart, a "Grants Received This Year" gauge chart showing a target of £76,500.00 and 40% completion, and a "My Tasks" section.
- Bottom-Middle Screenshot:** Shows a "Segment Builder" tool. It includes a list of criteria on the left (e.g., "Contact Record", "Regular Giving", "Opportunity Type") and a central visualization area with a pie chart. A list of segments is shown at the bottom, including "Donors Over £1,000 This Year" and "Donors Over \$500 This Year".
- Bottom-Right Screenshot:** Shows a "Segment Builder" interface with a list of segments and a table of results. The table has columns for "Action", "Query / Segment Description", "Segment 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' (Create Invoice, Send Direct Email, Add to Marketing List, Assign, Share, Copy a Link, Email a Link, Connect), '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 visible 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 the system clock '13:43 16/07/2014'.

Salesforce or Microsoft



Microsoft

- Fonteva
- Give Clarity
- Purple Vision
- Cloud Symphony
- Brightgen
- Silver Bear
- Excitation
- Pythagoras
- Alpha People
- M-Hance
- Ciber

Experiences of implementing Salesforce at Barnardo's

Bob Darby
Director of Information Services
Barnardo's

We help **240,000** children and young people last year

960 services nation wide



**Believe in
children**



Barnardo's

A computer lets you make more mistakes faster than any invention in human history, with the possible exceptions of **handguns and **tequila****

- Mitch Ratcliff

Agenda



1. Background
2. Our Journey
3. What we learnt
4. Recommendation
s
5. Questions

Believe in
children



Barnardo's

Context / Background



Scale

2 million
customer
records

3 million
individual
contacts
per year

100,000
direct
debits

15
Agencie
s

150
CRM
users



Believe in
children



Barnardo's

Our Journey

- Implementation took 32 months
- Operational for almost 2 years
- More change and fundraising scrutiny



What we learnt

- “No Pain, No Gain” for early adopters
- Fundraising ain't easy
- Business trumps Data trumps Technology



Recommendations



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children



Barnardo's

Recommendations – The TOP TWO

- Tick all the “standard” project success factors first
- Have a Business Process Guru



Recommendations – AND Then ...

- Find a implementation partner that “gets it” and “gets you”
- Do your ground work
- Be realistic over resourcing
- Watch Agile approach





Believe in
children



Barnardo's



Implementing Dynamics CRM at WaterAid

LESSONS LEARNED

IVAN WAINSWRIGHT

Agenda

- The WaterAid Implementatic
 - Quick History of CRM at WaterAid
 - Project Approach
 - People
 - Data Migration
 - Costs

- Dynamics CRM
 - Technology for NFPs
 - Cloud or On-premise
 - The Good and the Less Good



A Quick History of CRM at WaterAid

- Mid 1990's: Raiser's Edge (DOS) – a few thousand records
- 2013: Raiser's Edge v7: 1.7m constituents, 30m+ donations, 30m+ comms records, 350k regular givers
- Late 2013: Business Analysis -> Business Case -> Procurement
- December 2014: Procurement of Dynamics CRM 2013 using Ciber UK's NFP Framework
- June 2016: We go live with CRM 2015 (On-premise)
- Additionally: We also implemented a new Data Warehouse (SQL Server) and 'Integration Hub' (SSIS)





Intended Project Approach...

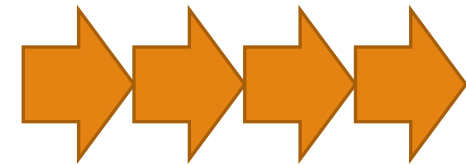
Discovery
(3-4m)

Design
(3-4m)

Build
(6-7m)

Waterfall

Iterative



Actually took 17 ¼ months (but on budget)

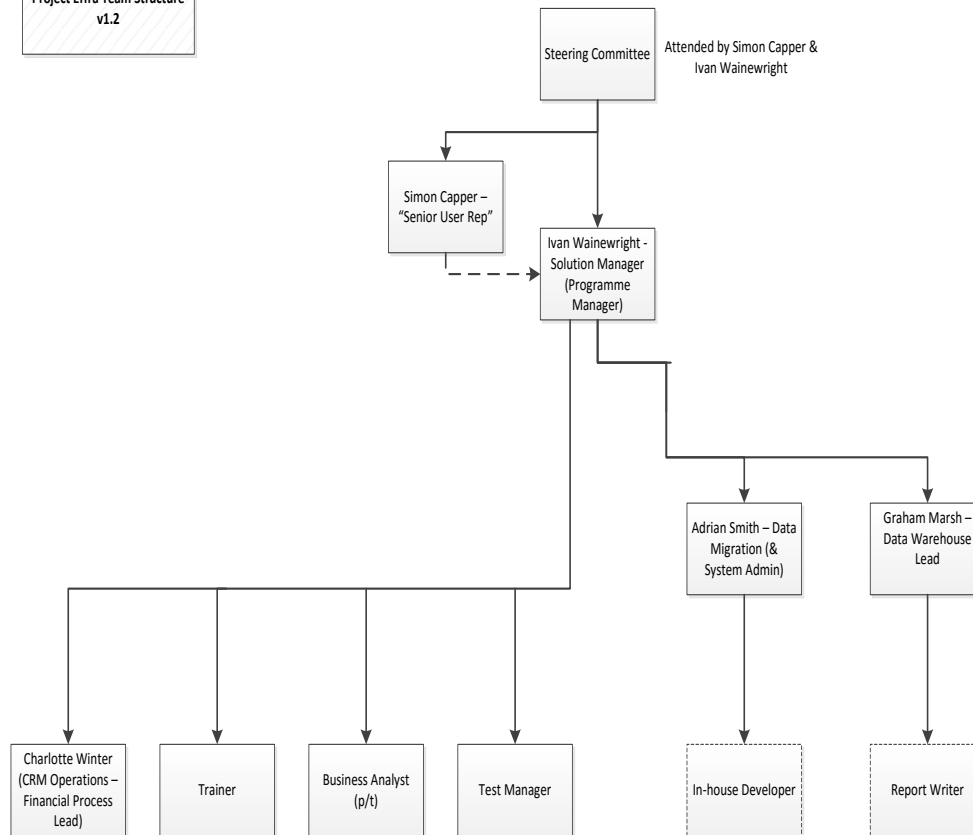
Project Approach – Key Lessons



- Configuration not Customisation where possible
- “We’re not trying to create Raiser’s Edge 2.0”
- Yes, ask users what they want, but start with base and go from there
 - Post-Live: Roadmap, not Phases...
- Don’t under-estimate challenge of data integration
- Treat reporting as its own workstream
- Work hard at supplier relationships
- Product Owner/Solution Owner

People

Project Effra Team Structure
v1.2



(NB: These roles will be brought on during the project)

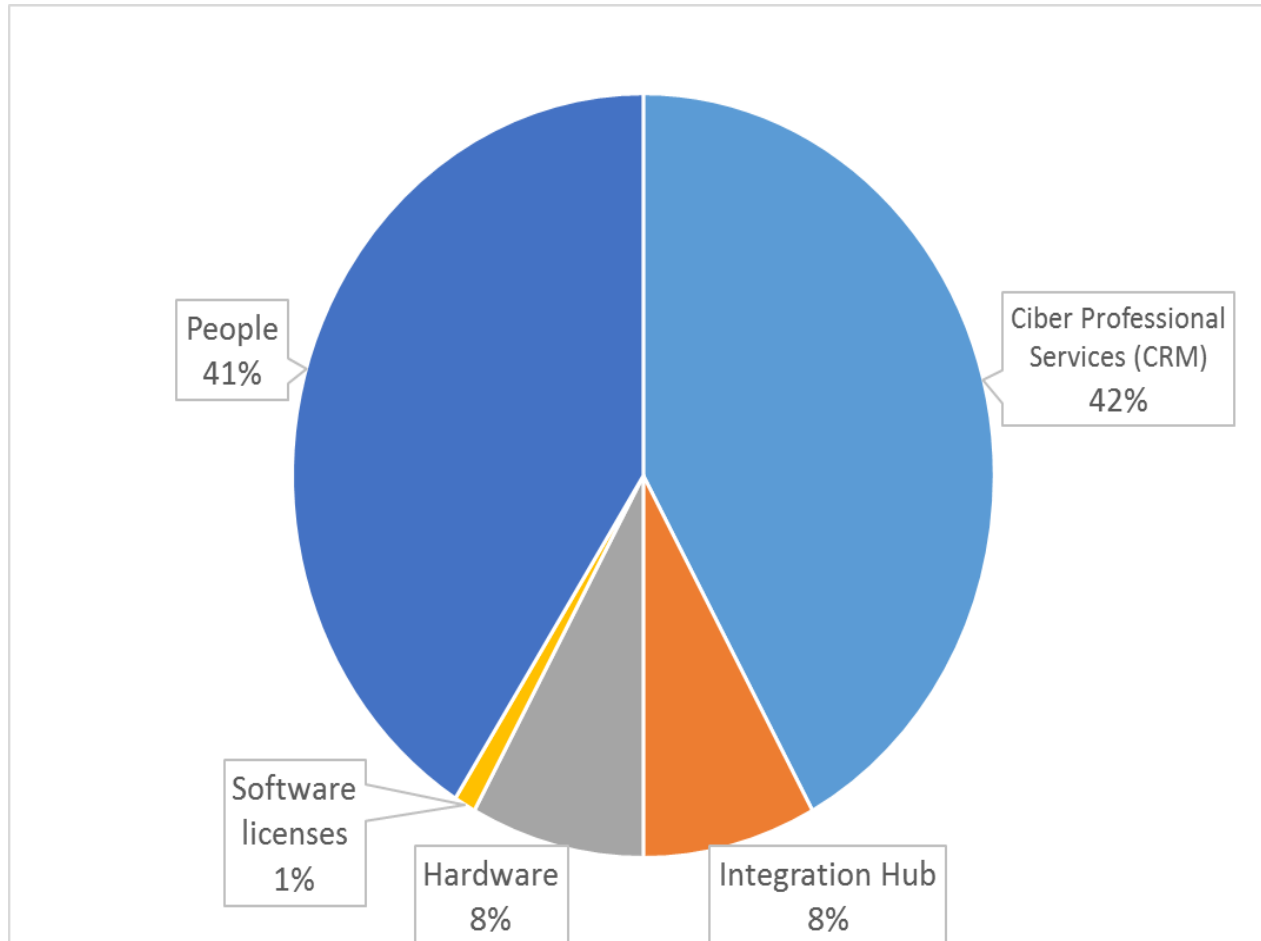
Data Migration



Microsoft
Dynamics® CRM



Costs



Dynamics CRM – The Technology/ Software: Key Lessons

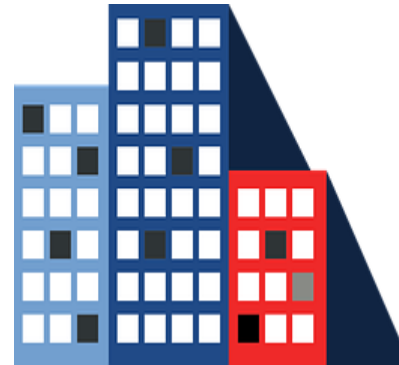


Core NFP functionality: It's Not Raiser's
Edge/ thankQ/ Care...

Regular Giving/Direct Debits

Development and Team Foundation Server
(TFS)

Dynamics CRM: Cloud or On-Premise



Dynamics CRM: The Good... and the Less Good

Good

- B2C
- Flexibility
- Development platform
- Integration
- Upgrade path
- Many apps & third-party consultants, community
- It's not Raiser's Edge...

Less Good

- Awkward Limitations
- What should be simple isn't always
- Limits on importing through front-end (use SSIS)
- Basic Mail Merge rather simple
- It's not Raiser's Edge...

Thank You



ivan@itforcharities.co.uk

Discussion and feedback



Review and close

Presentations will be available to
download from the Adapta website
tomorrow

www.adaptaconsulting.co.uk