



# CRM and cake XI

16 March 2022



@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**  
Welcome - introductions and overview of the agenda for the afternoon.  
Libby Hare, Adapta Consulting
- 14:15      **Wrongs ways to think about risk**  
Iain Pritchard looks at some of the ways organisations get off on the wrong foot with CRM projects.
- 14:45      **Case Studies and questions**  
Keith Collins, Adapta Consulting - The Solicitors' Charity implementation
- Coffee** – share learning with peers
- Graham Mulholland, Royal College of Ophthalmologists
- 16:00      **Roundtable discussion & feedback**  
All
- 16.45 -      **Review & close**  
17.00      Libby Hare, Adapta Consulting

# Introductions



# Iain Pritchard



- Adapta associate consultant
- 40 years in IT
- 30 years advising the NfP sector

# Wrong ways to think about risk



# Good advice...?

1. *Focus on getting the new CRM system you really need; be brave; don't get distracted by the idea that it might be better to stick with what you've got.*
2. *Don't get involved in career-ending conversations with senior managers about how difficult, dangerous and expensive a CRM project is likely to be.*
3. *Save money where you can – especially on project management; a member of staff looking for experience or a part-time volunteer who knows about computers can be a great choice.*
4. *Focus on the technology; a good system will always work even if the implementation partner turn out to be a disappointment.*
5. *Make sure any contract you sign is legally watertight – especially, make sure the contract binds the supplier to delivering exactly what you've documented.*
6. *Don't waste time talking to other organisations about their experience; all organisations are different and what worked for someone else won't be relevant to you.*

# Or perhaps, instead....

1. *Think seriously about all the options **before you commit**. Maybe **consider a business case ...***
2. ***Speak truth** to power. If you' aren't sure what a CRM project should really involve and costs, ask someone who knows **and make sure the senior management and or trustees make an informed decision** to go ahead*
3. *Expect to **spend what it really takes**. That may include paying some (temporary) resources more than the most senior people in your organisation earn.*
4. ***Focus on the people** not the software; a good supplier can make a poor system work for you; never the other way round.*
5. *Don't just look at the contract from a legal perspective. Think about it as a project tool and **make the contract (reasonably) flexible** so that all parties have room to make flex.*
6. ***Talk to as many people as possible** who've been down the same road – especially about what they wish they'd done – **most of us make the same mistakes...***

# Questions and Comments (if we have time..)



# Thank you!

THE  
SOLICITORS'  
CHARITY.

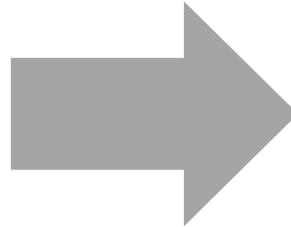
Supporting you, since 1858

We're here for  
solicitors when  
times get tough.

Salesforce implementation at  
The Solicitors' Charity.



**Sue Ellis**  
**The Solicitor's Charity**



**Sue Ellis**  
**The Solicitor's Charity**

**Keith Collins**  
**Principal Consultant, Adapta**

# A CRM story with a happy ending...eventually!

- Scoping and requirements gathering to replace ageing, poorly integrated systems
  - Fundraising, grants, client casework – on to a more modern, digitally-able solution
  - Tales of data migration challenges!
  - Tales of project management & resourcing challenges!
-

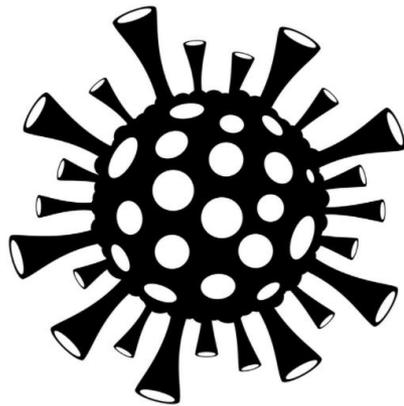
## A CRM story with a happy ending...eventually!

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But it's their story, and Sue will tell it better than I ever could

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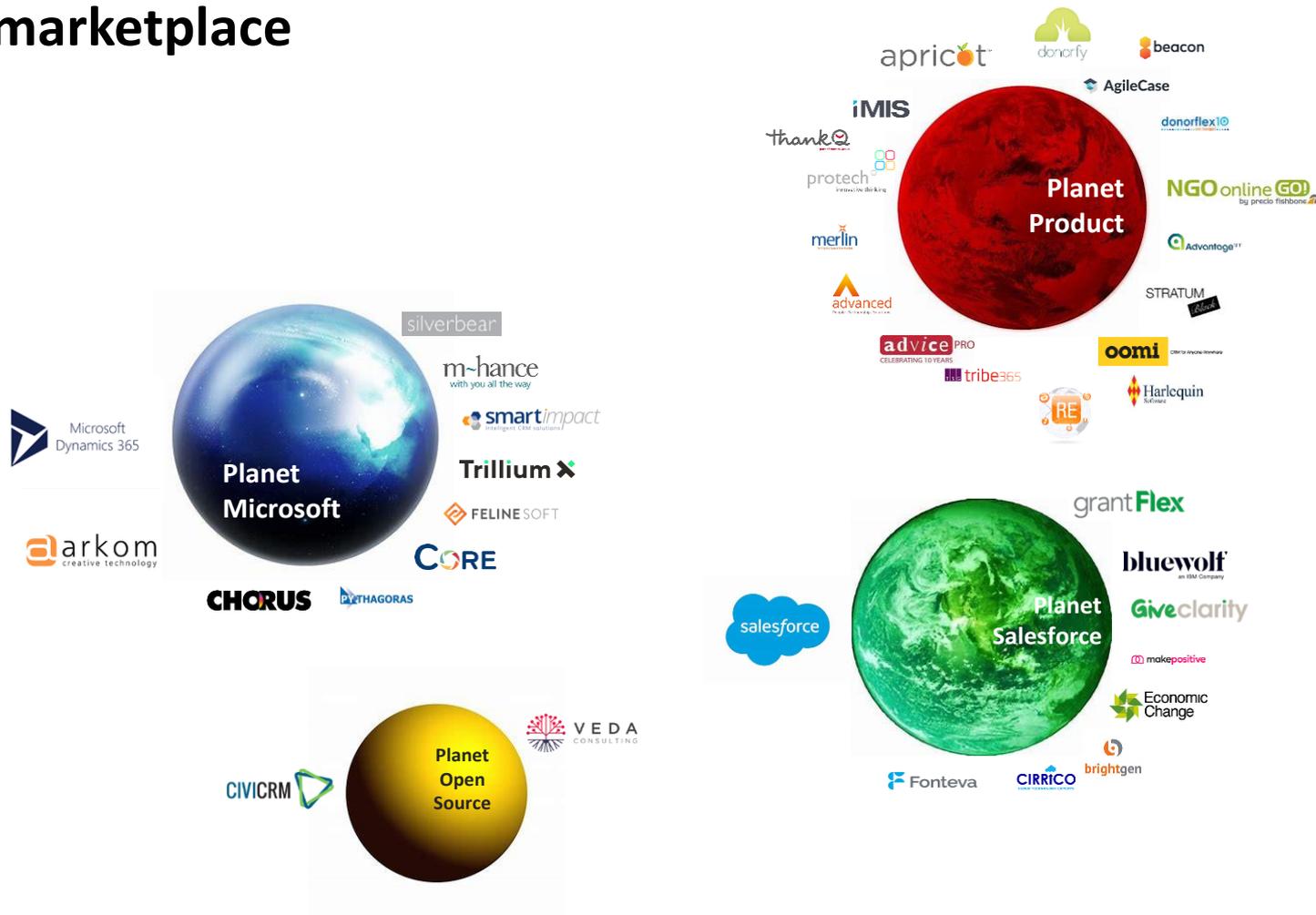
# Two big, unpredictable challenges!



Focus today on this one...



# One way to think about the CRM marketplace



Salesforce & Microsoft aren't going to go bust...but the implementation partner companies are usually small/medium companies, with the same business challenges as everyone else...



**Microsoft partners – typically a bit bigger –  
working across whole Microsoft suite,  
sometimes also doing Umbraco/Sitecore  
implementations. Often working beyond  
NFP sector**



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**Salesforce partners – some very big, some mid-sized, some very small. Usually just focused on Salesforce, often focused just on one area – e.g. fundraising, portals, membership**

# What's the possible impact of your implementation partner going into liquidation?

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You may have internal resources dedicated to the project – that will need to be retained

*Due  
Diligence*



**TURNOVER IS VANITY  
PROFIT IS SANITY**

**BUT**

**CASH IS  
KING**

If your prospective partner is making a healthy profit...that's a **good** thing

If your prospective partner has got recurring revenue streams (i.e. IP, service contracts) ...that's a **good** thing

If your prospective partner has got a good turnover to staff ratio ...that's a **good** thing

If they've got money saved for a rainy day...that's a **good** thing

If your prospective partner advocates lots of customisations...that might be a **bad** thing

Imagine you're finding a builder to build an extension on your house...and apply the same rigour





If you need to **swap** partners – for whatever reason – what do you need to know before you go **shopping**?



Whatever they say, no one likes being the **'white knight'** and saving somebody else's challenged project



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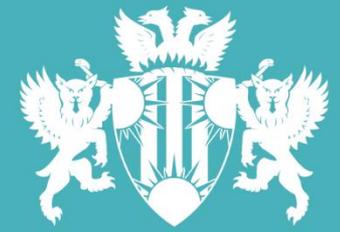
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Get the balance right between due diligence & **maintaining supplier interest**

Avoid coming across as too **desperate!**





*The* ROYAL COLLEGE *of*  
OPHTHALMOLOGISTS

Graham Mulholland, IT Manager

RCOphth

Eye doctors setting standards to help patients

~15 years in IT service providers / MSPs / VARs

>15 years in end user charity / NfP / 3<sup>rd</sup> sector  
orgs



# The role of the College



The ROYAL COLLEGE of  
OPHTHALMOLOGISTS

## Our vision ....

... is that everyone has access to and receives high quality eye care for the prevention and treatment of eye disease in order to optimise, preserve and restore sight

# The role of the College



The ROYAL COLLEGE of  
OPHTHALMOLOGISTS

The purpose of the College is to advance the science and practice of ophthalmology

- ❖ Educate, train and assess medical practitioners in the science and practice of ophthalmology
- ❖ Maintain proper standards in the practice of ophthalmology
- ❖ Promote study and research publishing results in papers and through our scientific journal 'Eye'
- ❖ Further instruction and training both in the UK and overseas
- ❖ Educate and inform the general public in all matters relating to vision and the health of the human eye

Independent, professional membership organisation with charity status

# Implementation

“Upgrade due to be complete by end February 2019.”

Jan 2019: Started collecting criteria to be able to test upgrade had completed properly

March 2019: Paused project as no closer to a viable upgrade

May 2019: Proposal to cancel upgrade (outstanding for 8 months) and replace CRM entirely – “We are not in a position that we can do nothing.”

Establishment of project board. Initial Draft of Requirements

April – July 2019 Supplier investigation and selection of Preferred Supplier

July 2019 Budget approved by Trustee Board

August 2019 References, Contract Signing

Sept. 2019 – January 2020 Business Process Review / Re-Specification

February 2020 – End of CRM Support Contract

## **March 2020 – Covid**

May 2020 – End of Website Hosting Contract

## **October 2020 – Go LIVE!**

# Benefits (Realisation ongoing)



The ROYAL COLLEGE of  
OPHTHALMOLOGISTS

- Greater self-maintenance capability
- Off-the-shelf training and documentation
- Simplified support
- Wider support options
- Easier integration (potentially)

# Benefits (Realisation ongoing)



The ROYAL COLLEGE of  
OPHTHALMOLOGISTS

- Greater self-maintenance capability
  - Very useful, has saved quite a bit of support time
- Off-the-shelf training and documentation
  - Difficult to get people to engage generally but useful for me
- Simplified support
- Wider support options
  - Haven't really taken this up but most integration work hasn't needed much support from our implementation partner
- Easier integration (potentially)
  - Mostly true and continues to provide unplanned benefits

# What we've done in the last year...



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- Online Affiliate member applications
- Online Part 1 exam registration  
(Different forms technology, preparing for cloud migration)
- Advisory Appointment Committee management
- Invited Review tracking
- International Signposting
- Sundry additional fields and reports

# Now and Next...



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- Online Learning platform  
(Brightspace by D2L)
- Online Communities  
(Discourse, implemented by Cantarus)
- ePortfolio 2024  
(early stage project)
- Member Recognition Certificates
- Engagement Scoring
- Redevelop/brand self-service area
- Move more forms and processes online
- ...

# Things I Wish I'd Done Sooner



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- Complete field-level name, location and responsibility documentation of the database
- (Get an Assistant)
- Firmer grasp of and earlier action on workstreams liable to slippage



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# Discussion and feedback



# Event feedback

Please use the QR code to view and complete the online feedback form.



# Thanks & Goodbye!

## *Upcoming events...*

### **Data protection, information security and cake 24 May 2022**

[www.adaptaconsulting.co.uk/adapta-events](http://www.adaptaconsulting.co.uk/adapta-events)

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