


CRM, Customer Data and Cake

25 September 2024





- 
- We are a **specialist** information systems consultancy
 - We only work with **charities**, associations, trusts and others in the not-for-profit 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

What we do



Programme

Timing	Session
14:05	Welcome
14:05	CRM - State of the Market
14:20	Rob Parkin, North West Air Ambulance Charity <i>Modernising CRM and data management at a medium-sized charity</i>
14:45	Sunil Mir, Action Aid <i>Modernising CRM and data management at a large development NGO</i>
15:10	Cake (if there's any left)
15:25	Gary Seaman, Cranstoun <i>Modernising how we think about data management without implementing a new CRM!</i>
16:00	Quick Q&A – pre-event questions
16:15	Group discussions
17:00	Close



STATE OF THE MARKET



**Future approaches to CRM
and data**

Past
approaches?





But...it's
still all
very
tricksy

Technology

There are still brave new worlds to explore...



*This is just a brief cross-section of the suppliers and systems available for not-for-profit organisations. Read our latest white papers for a more detailed analysis of the various options across all the suppliers in the sector at www.adaptaconsulting.co.uk/adapta-publications

Technology

But the people to get you there have changed...



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Market alignment?



Product & IP?

Killer acquisition?

Market alignment?

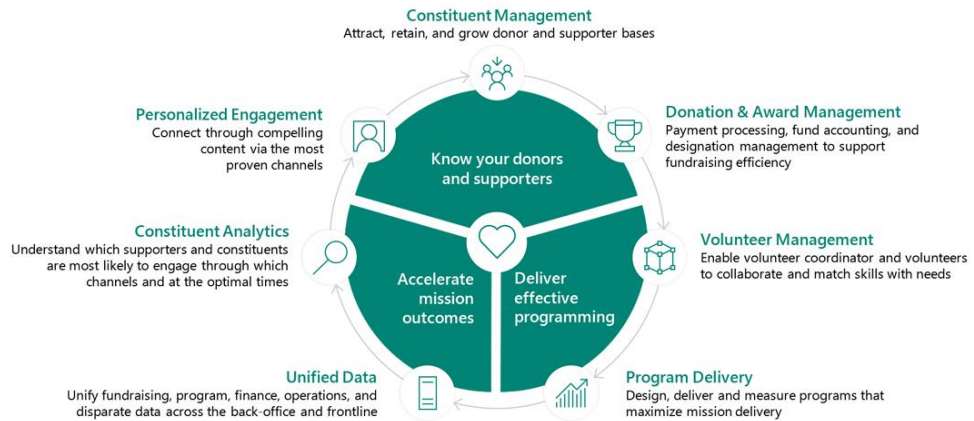
Killer acquisition?

Other random stuff out of nowhere

2003

2024

Microsoft Cloud for Nonprofit



1999

2024



2003

2024



1999

2024



Microsoft's offering – what we're being told...

- Fundraising & Engagement and Volunteer Management & Engagement – retired December 2026
- Was *“by far the most significant part of MC4N”*
- New ‘Microsoft Fundraising’ “template app”, still based on MS nonprofit common data model – but *“not very significant, and not a replacement”*
- Some partners gaining access to core Microsoft Cloud for Nonprofits source code so they can continue support
- MS Nonprofit Common Data Model – remains core
- **Partner IP – now the focus – depth of functionality, IP ownership and portability - key**
- Low code Power Apps – also key – if appropriate

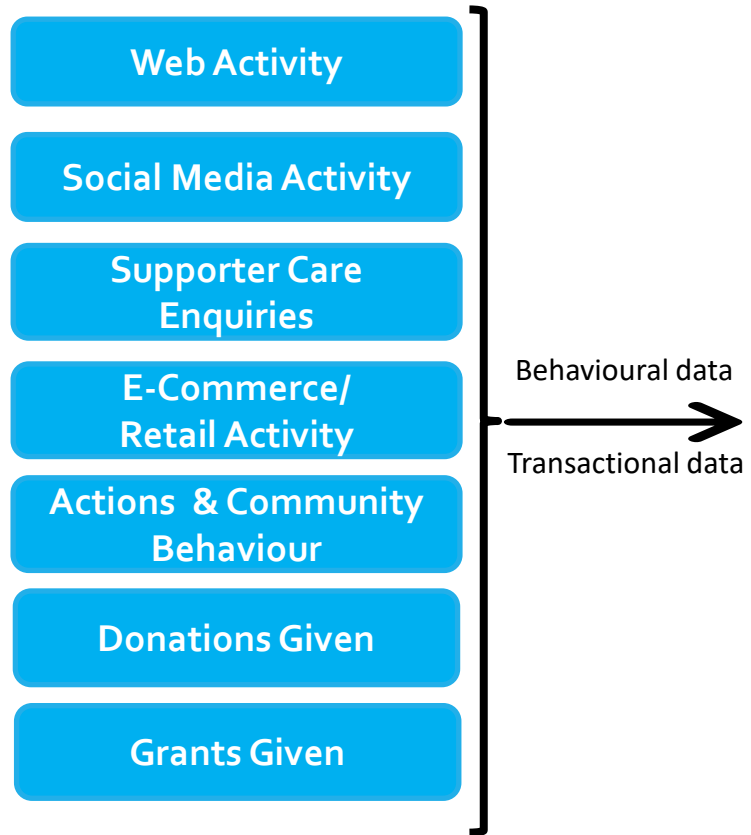


In response to a journalist's question about what could potentially derail his CRM Project British Prime Minister Harold Macmillan is reputed to have replied, "Events, dear boy, events."

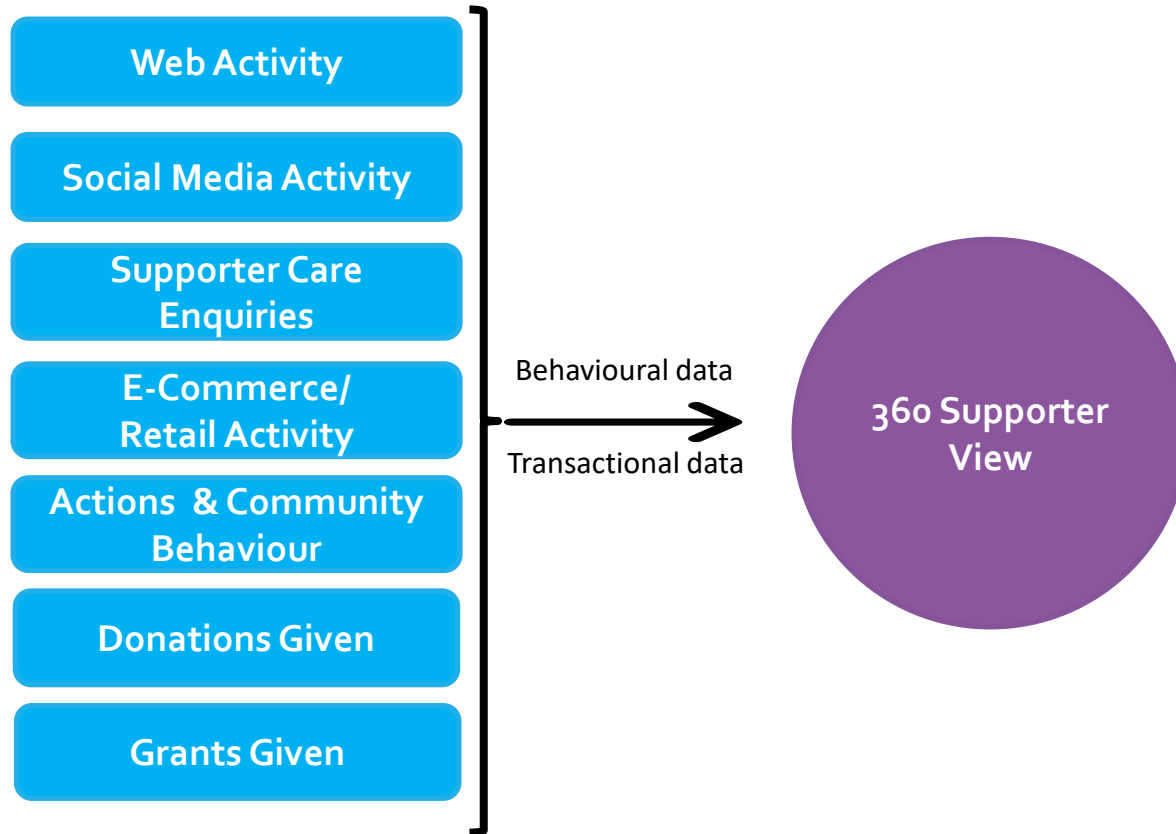
If you're interested in Microsoft Dynamics, the focus is now both on which partner is the best fit and even more on what IP and functionality they offer, and on what basis



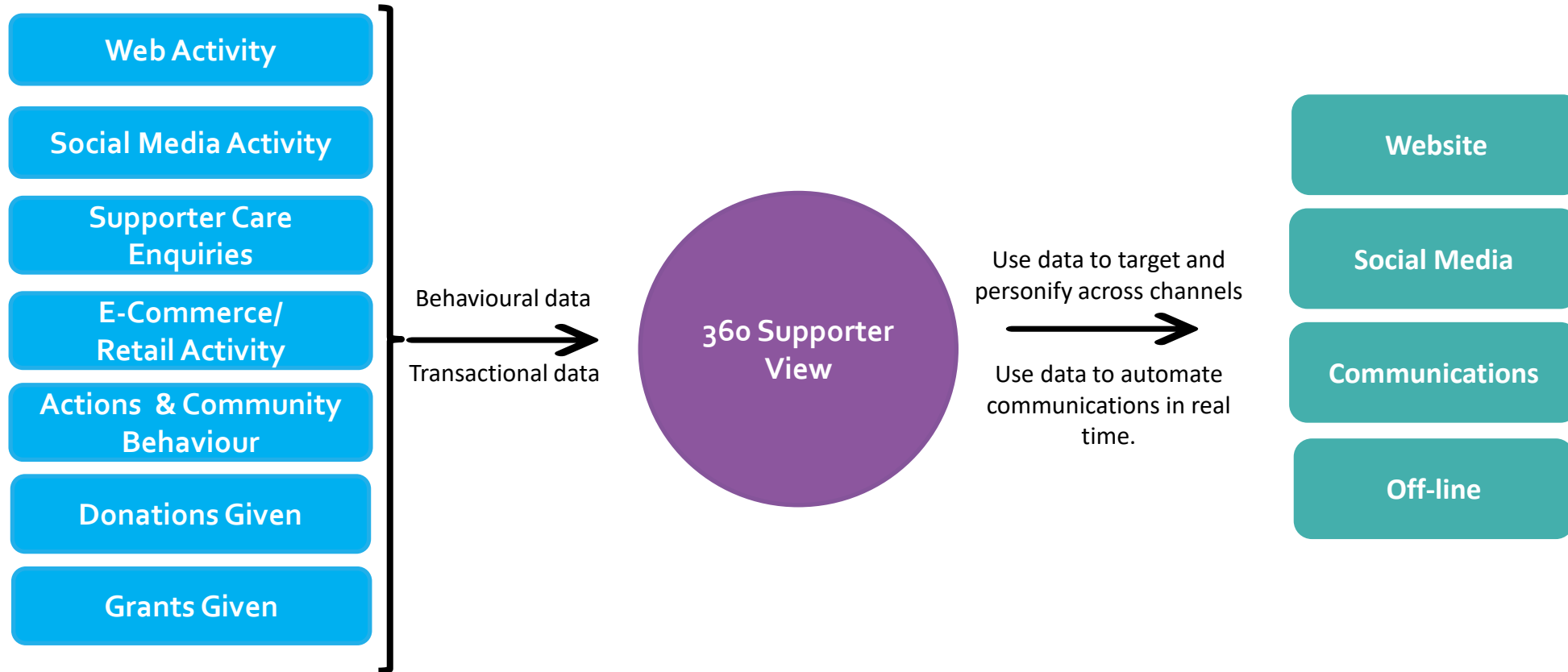
Thinking beyond CRM



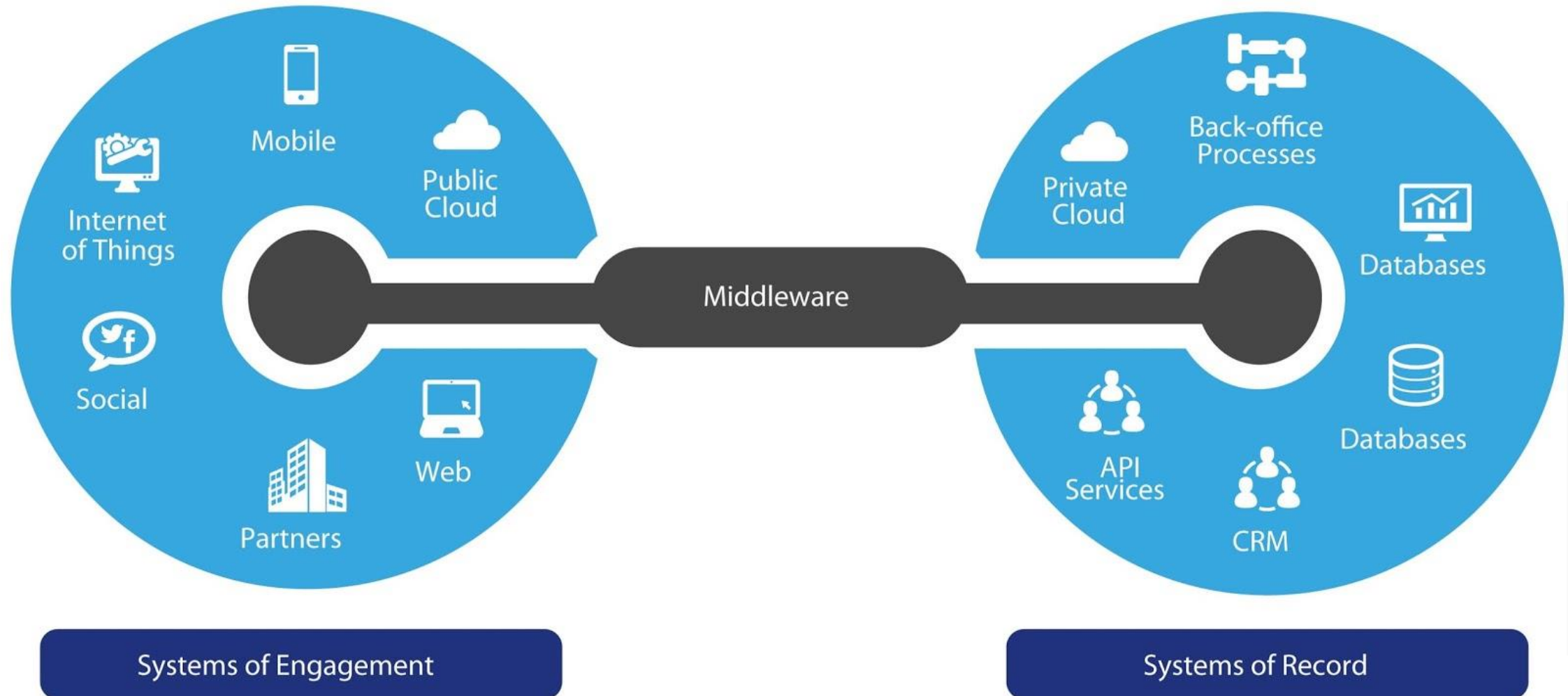
Thinking beyond CRM



Thinking beyond CRM



Thinking about how it all works together



Microsoft Fabric, Salesforce Marketing Cloud Intelligence (formerly Datorama) and lots of other options...



Microsoft Fabric Overview

An end-to-end analytics solution with full-service capabilities including data movement, data lakes, data engineering, data integration, data science, real-time analytics, and business intelligence



Data Factory

Streamline data ingestion and accelerate data transformation with easy-to-use integration tools. Unify your data with Microsoft Power Query in Data Factory



Synapse Data Engineering

Provide your data engineers with authoring experiences that support data analysis and optimize collaboration.



Synapse Data Science

Quickly create predictive AI models at scale and boost collaboration when training, deploying, and managing machine learning models.



Synapse Data Warehousing

Gain industry-leading SQL performance and the ability to scale computing and storage independently.



Synapse Real Time Analytics

Improve products, customer experiences, and business operations through real-time analysis of large volumes of data from apps, websites, and IoT devices.




PowerBI

Data visualisation platform in the form of a collection of software services, apps, and connectors that allow us to access, model and serve data as interactive dashboards.



Data Activator

Instantly respond to new data and insights through a system of detection that automatically alerts your team with relevant information.

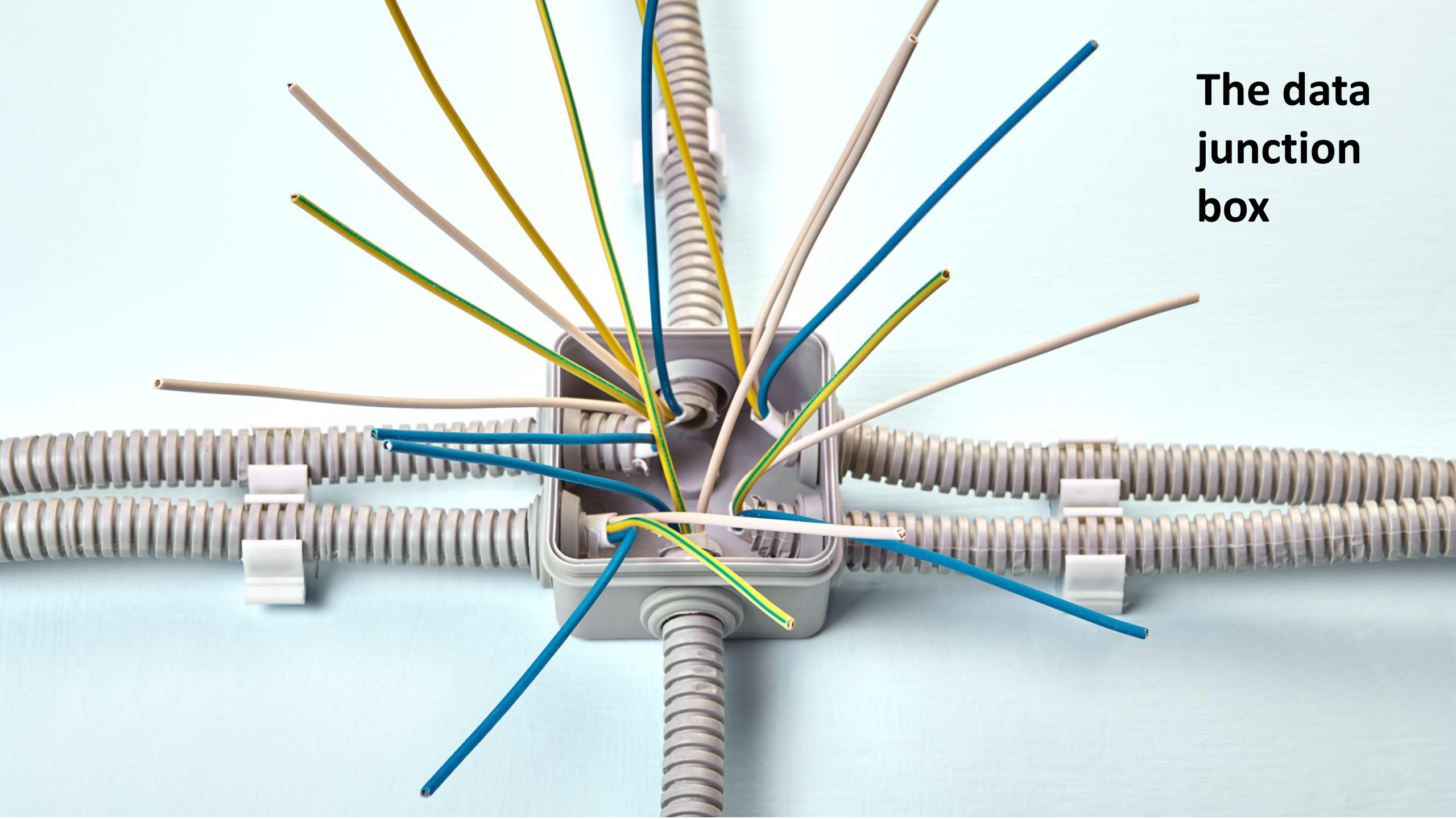


OneLake

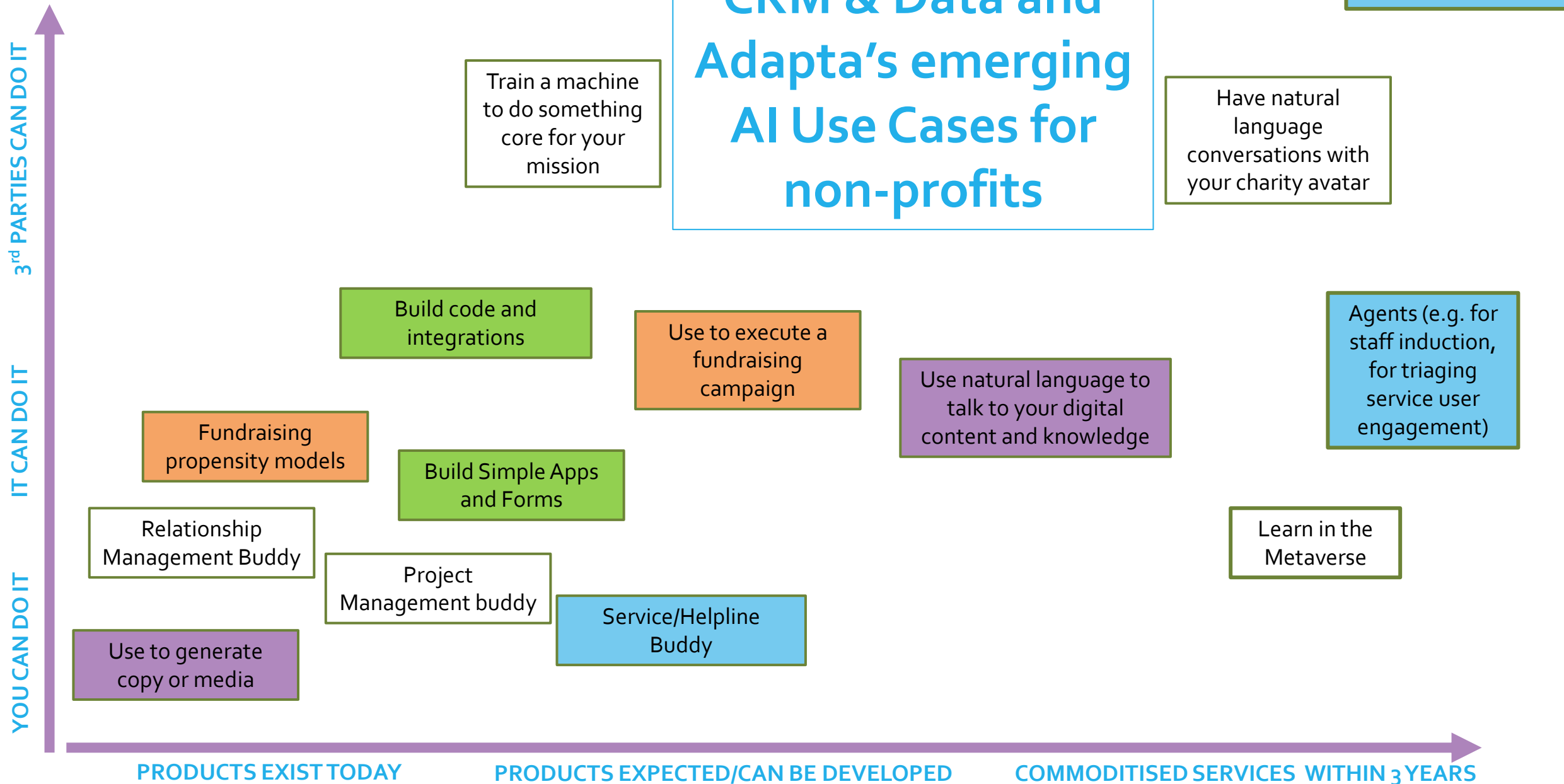
OneLake is a single, unified, logical data lake for the whole organization. Like OneDrive, OneLake comes automatically with every Microsoft Fabric tenant and is designed to be the single place for all your analytics data



**The data
junction
box**









Embracing the Unknown

How NWAA entered a new, digital future



Who are we – and who am I?



- Rob Parkin – CRM Manager
- 8 years at the charity
- North West Air Ambulance Charity
- 25 years old this year
- Migrated from Donorflex to Donorfy

Understanding NWAA



Legacy system

Ambitious strategy

Desire for automation

Software bloat

Disjointed teams

Creaking under the pressure

Consultants – advice, efficiency, insight



- Why did NWAA use a consultant?
 - Lack of internal experience with migrations
 - Resource and time management
 - The right system for YOU – be careful of perception
- Who we spoke to
 - Adapta
 - Hart Square
- Why Adapta
 - Independent
 - Bespoke approach
 - Cost



Why not Salesforce or Dynamics?



VS



Microsoft
Dynamics® 365

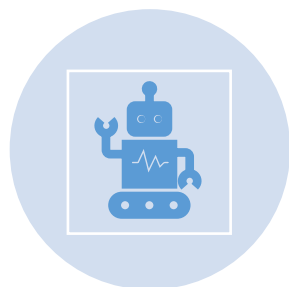
Why Donorfy



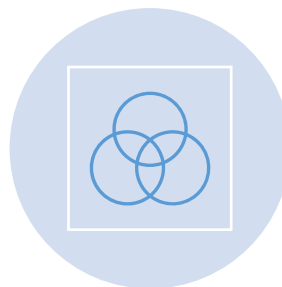
Integrations



Team Usage

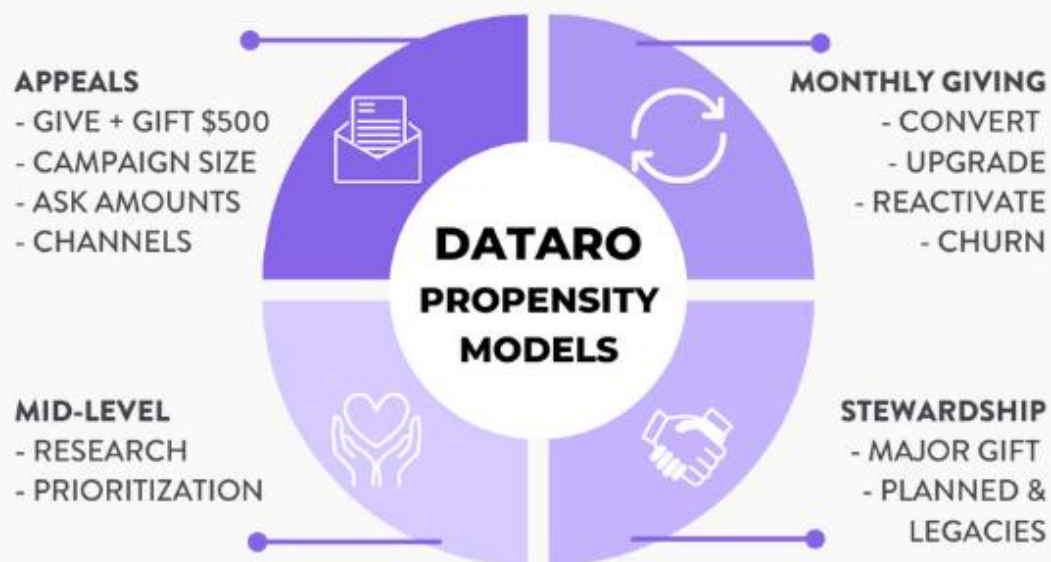


Automation – built in
and Own Azure



Data Governance

Dataro



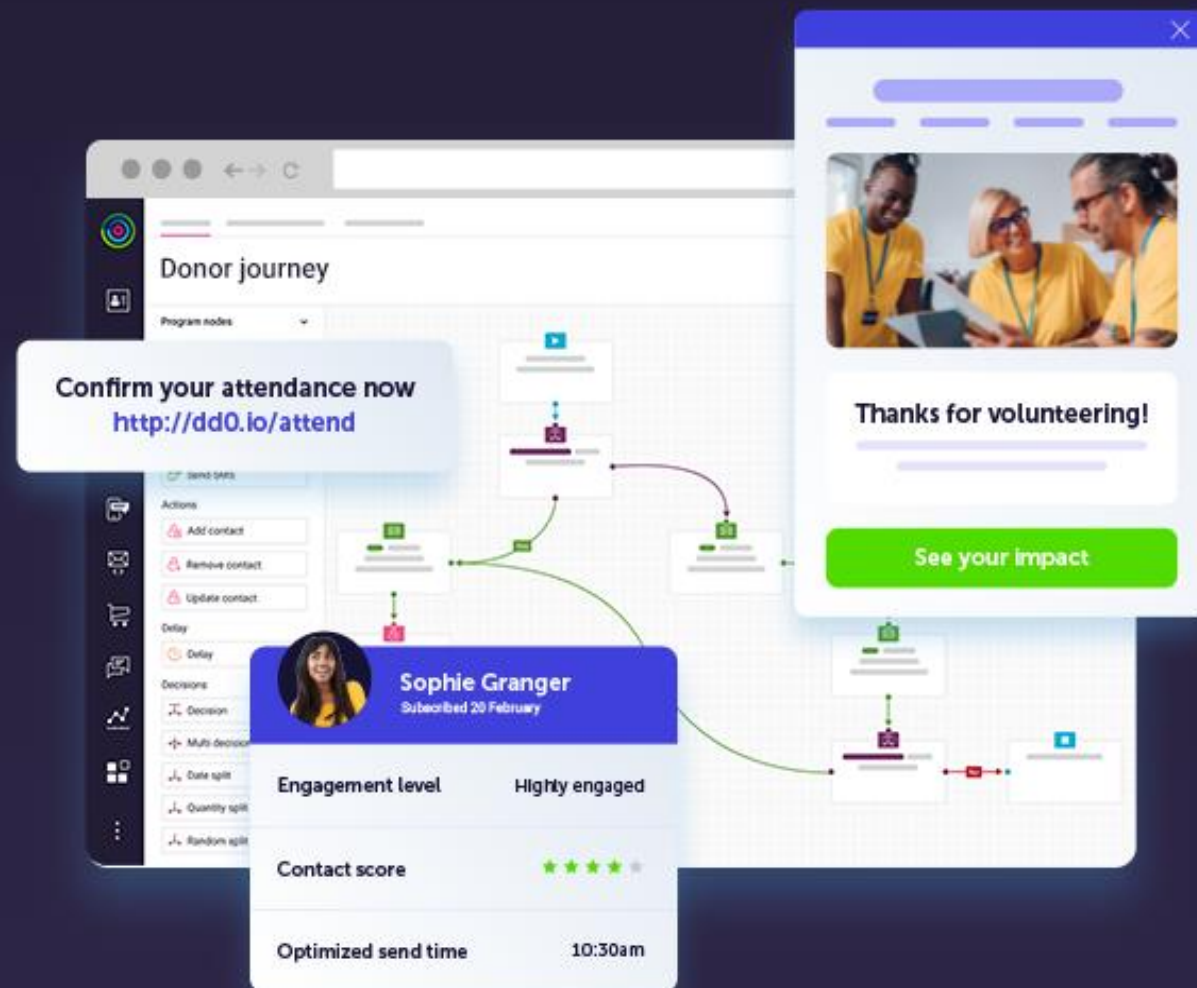
Pick the predictions to meet your fundraising goals

Every fundraising program is different. With Dataro Predict, you can choose the propensity models your nonprofit needs to engage donors at every point in their donor journey.

Dotdigital



dotdigital





Red Cactus Telephony (Bubble)

Summary of Bubble desktop features



Pop-up notification

Instantly all customer information on an incoming, outgoing and transferred call.



SearchBar

Search directly in CRM contacts, open a customer card or send a message.



Click-to-dial

With 1 click on a phone number, start a phone call from your CRM or any website.



Call recording

Automatic capture of call information in your CRM under the customer card.



Call note

Take notes immediately so that all information is visible to your colleagues.



Call history

Instantly see when and with which colleagues the caller has previously spoken.

Own Azure & Power BI



- Our own bespoke server allows for complete custom work outside of Donorfy functionality
 - Automatic flagging of underage gambling
 - Data retention rules can be automatically administered within the CRM via Own Azure
 - Scalable power rather than relying on a shared environment
- PowerBI allows for custom reporting beyond CRM functionality
 - Visibility of staff usage, integrations, and configuration elements for ensuring the system remains up to date and relevant
 - Custom reporting for each department to streamline budgeting and leadership reporting

Data Governance



- Recently implemented a charity Data Strategy alongside CRM implementation
- Data Use Cases
 - The 6 core principles of why NWAA collects the data it does and for what purpose
- Data Maturity Assessment
 - Benchmarking where NWAA is now – and a baseline for the future
- PIG (data protection group) Review
 - Fortifying and ensuring PIG covers everything it should
- Business Data Glossary
 - A thorough technical documentation of NWAA data giving clear visibility of data across all platforms
- Data Quality Standards
 - The key standards NWAA wants to see in any data being inputted to ensure high quality data usage



What we learnt along the way

- Be aware of what you need to get out of your new CRM – and make an informed choice
- Consultants can pick out the elements that matter to you from the sales pitch fluff
- Identifying the areas that will require closer attention will garner greater success
- Some things just take a long time to get sorted – longer than you expect!

Now and into the future



- 4 months in, biggest wins are:
 - Streamlined processing
 - No more spreadsheets!
 - Custom Reporting via PowerBI
 - Telephone Integration
 - Stronger data management and usage of data across the charity
- Innovation the aim of the game - Dataro the current big test
- Finish integrations with Sterling Lottery and Raffle, Volunteero and scale up Dotdigital functionality now fully onboarded

Changing the world
with **women and girls**
act:onaid

Changing From One CRM to Another

Sunil Mir

Deputy Director - IT

Changing the world
with **women and girls**
act:onaid

We successfully went live in
January 2024

The Background....

- Existing CRM – Infobase with many years of bespoke development.
- Also using Raiser's Edge.
- Both systems sitting on infrastructure that was end of life\support.

The Challenges....

- Organisation Challenges –
- Staff Turnover
- Data
- Storage Cost
- Updating Business Processes

What helped us....

- Supportive Steering Group
- Core Project Team
 - Project manager, Comms and Training role, Technical Development role, Business Analyst
- Super User Group
- EY Pythagoras

Things we could have done better....

- Backfill key roles
- Challenge Technical decisions
- Minimise bespoke development

Anyone for cake?



Gary Seaman – Head of Performance & Reporting

Data First Approach

Adapta: CRM, Customer Data and Cake event

25th September 2024



About Us

Vision: To be a world-class leader in rebuilding lives

Purpose: To inspire and empower people to live healthier and safer lives

Mission: To identify, develop and deliver innovative, evidence-informed solutions that rebuild lives

Values: Ambitious, Creative, Compassionate, Collaborative, Respectful



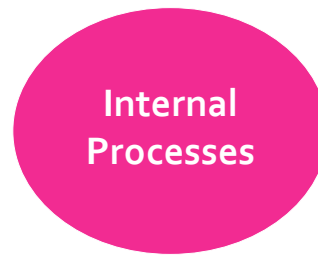
Our 4 Spheres & Strategic Aims



Lead the development & delivery of international best practice that rebuilds lives



Develop highly skilled people & teams to deliver world-class services



Drive innovation and excellence through our systems



Secure a sustainable operational surplus to grow our investment capability

Underpinned by a culture of 'One Cranstoun'



What we deliver



What sets us apart

Innovation
Fund

Global
Evidence

Reduce Social
Injustice

Policy &
Lobbying

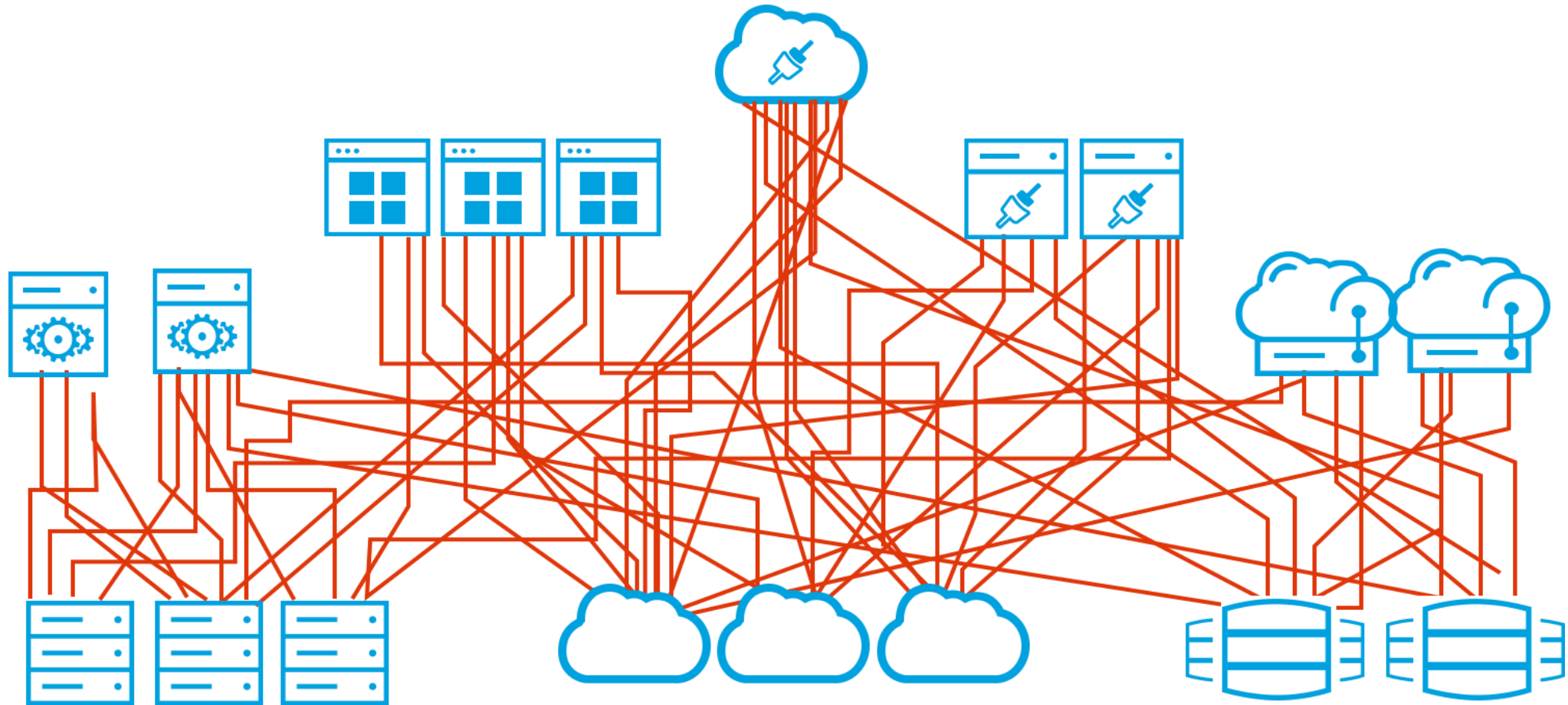
Lived & Living
Experience

Invested in
People

Quality and
Safety



Making Sense of Data (The Skittles Approach)



Explain Data (Using Skittles)



Data Maturity Survey Analysis

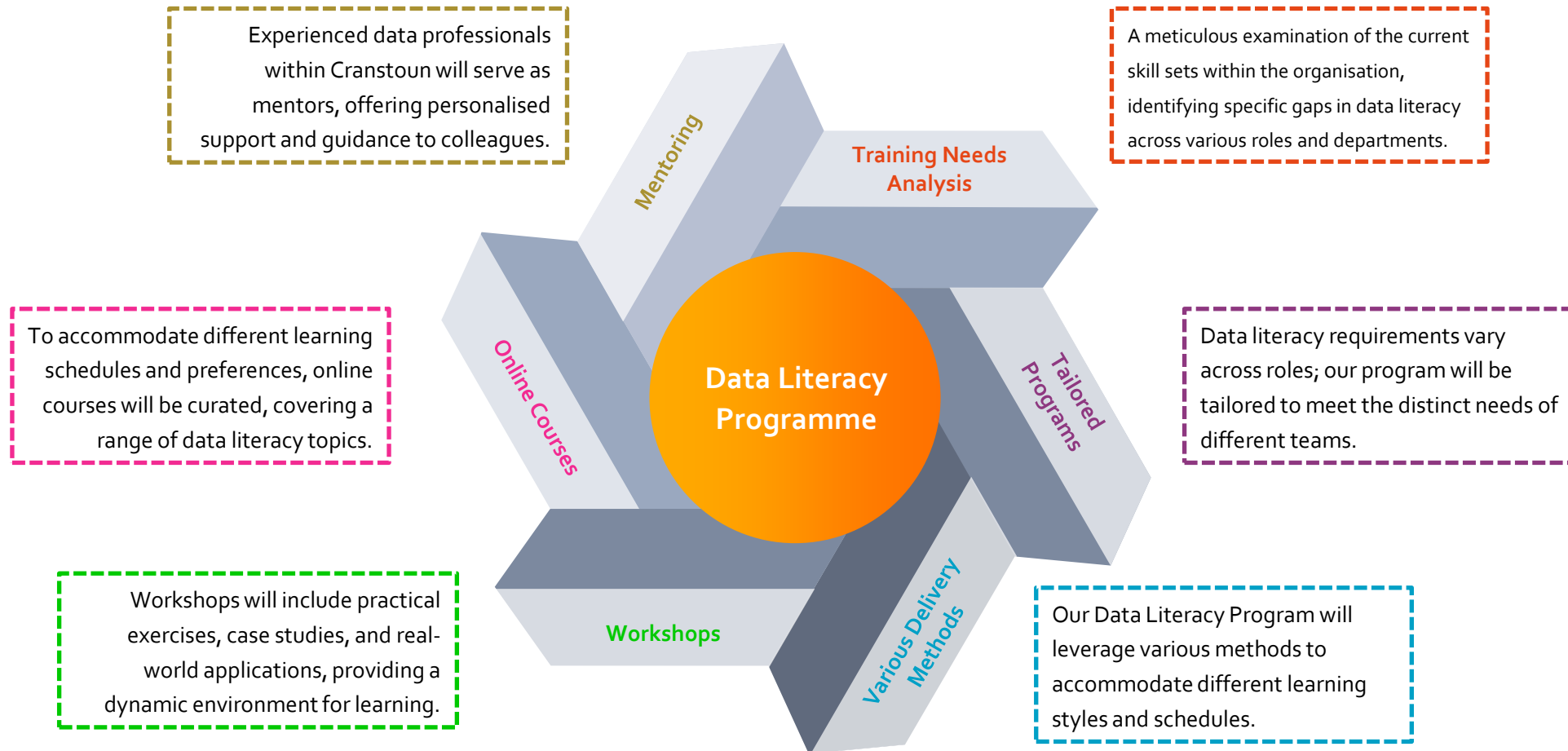
Key Themes

Staff Responses Vs Head of Performance & Reporting

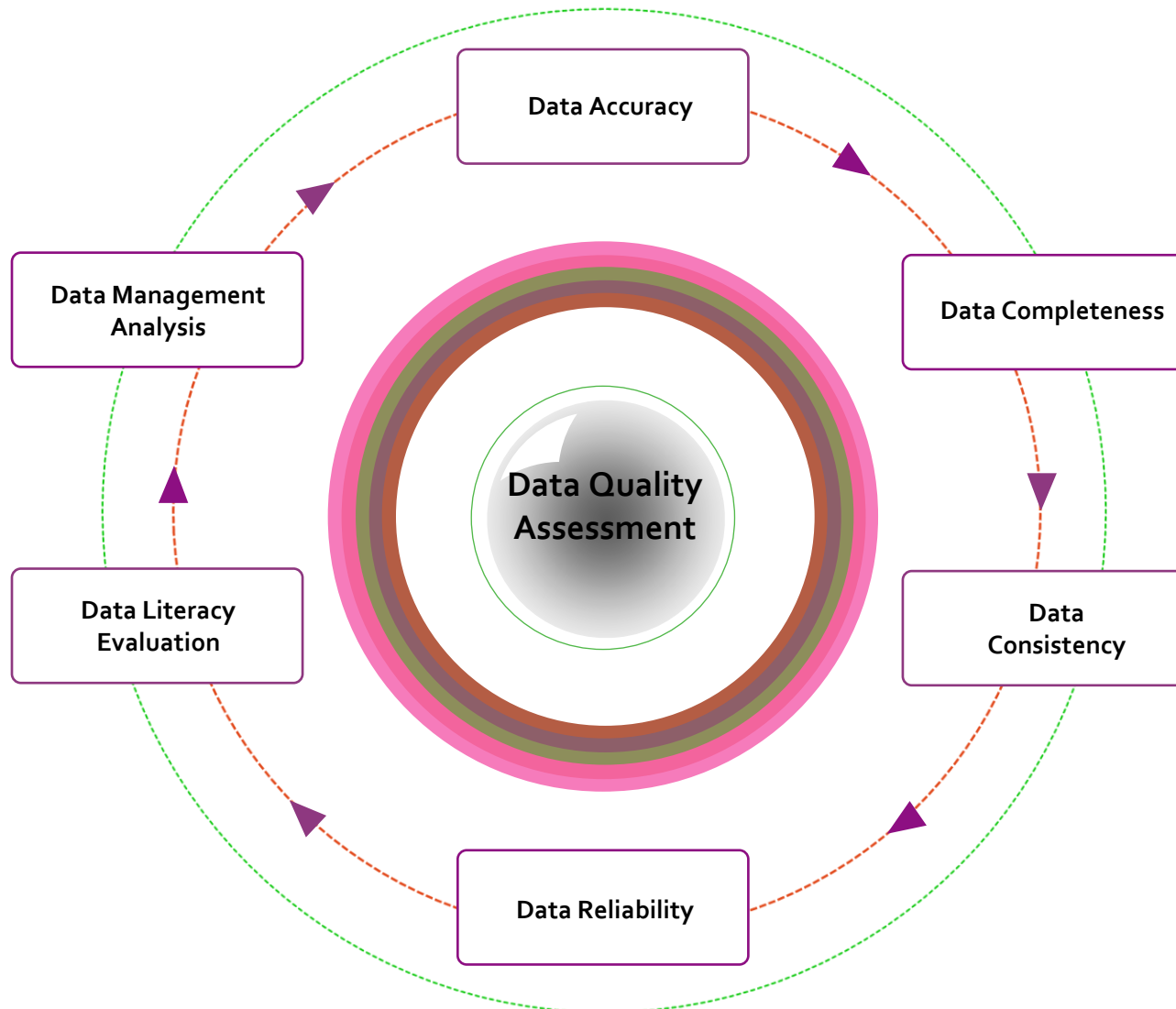
Uses	How would you rate your understanding of why we collect and use data at Cranstoun?
Data	How would you rate your understanding of the data we collect and its quality at Cranstoun?
Analysis	How would you rate your understanding of the data we analyse and present to different audiences from its type and technique?
Leadership	How would you rate your understanding of how Cranstoun collects and analyses our data to inform future investment?
Culture	How would you rate your understanding of how data is recorded at Cranstoun in terms of protection and team approach?
Tools	How would you rate your understanding of how data is collected, stored, organised and managed at Cranstoun, with a view to analysis and reporting?
Skills	How would you rate your understanding of the skills, capacity and access to knowledge and expertise at Cranstoun?



Data Literacy Programme (Empowering Teams with Insightful Analytics)

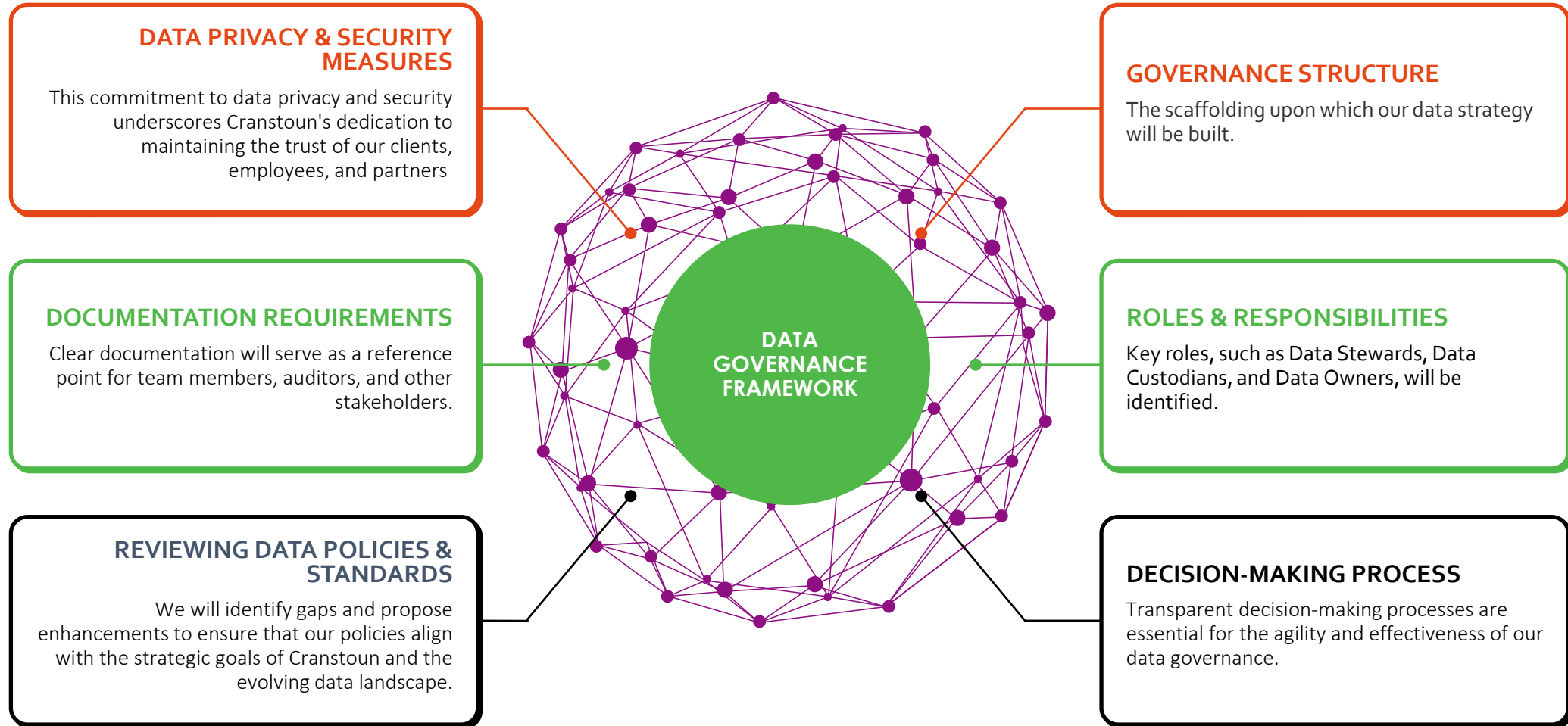


Key Data Elements (Data Quality Assessment)

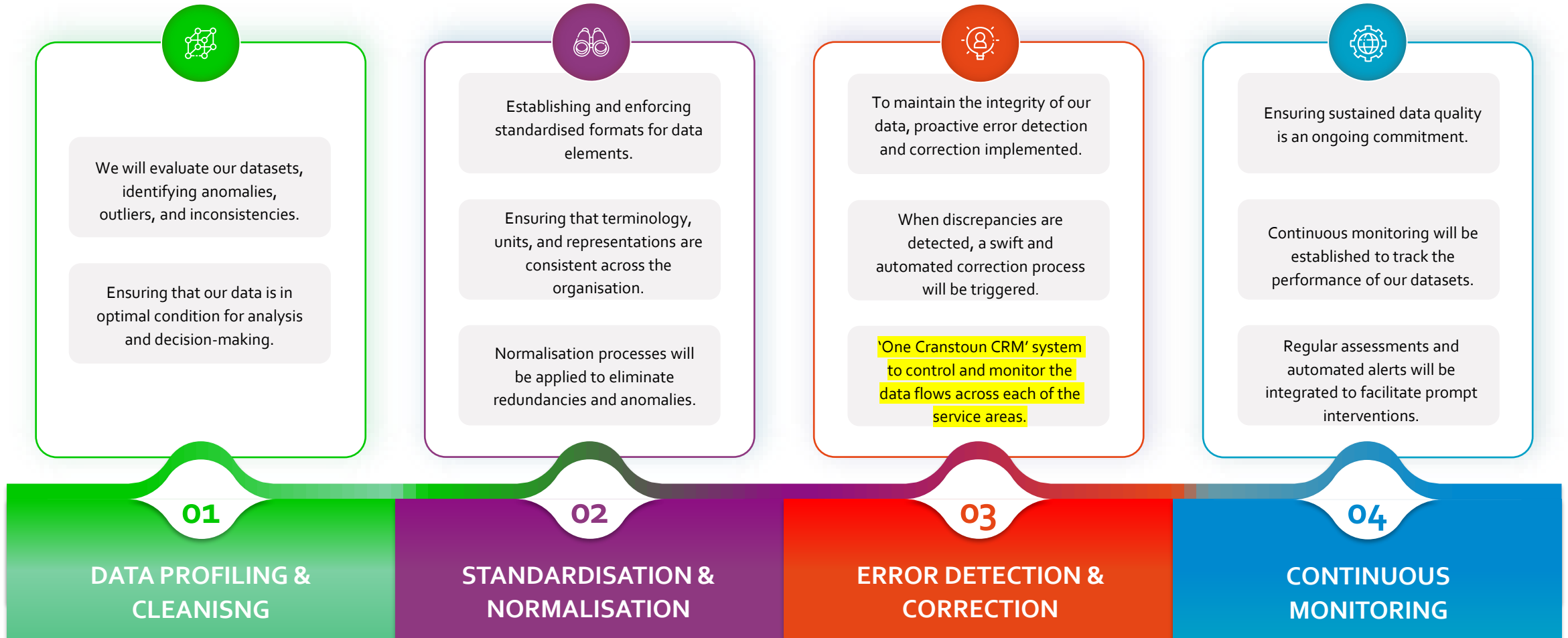


- **Data Accuracy** - Pinpointing discrepancies and inaccuracies
- **Data Completeness** – Identifying and rectifying gaps in our data
- **Data Consistency** – Uniformity of data across various sources
- **Data Reliability** – Identifying trends or patterns that may impact reliability
- **Data Literacy Evaluation** – Understanding the current state of data literacy across the organisation
- **Data Management Analysis** – Investigating the current data architecture, exploring systems integration and dependencies

Data Governance Framework (Establishing the Pillars of Excellence)



Data Quality Improvement (Nurturing excellence in every Byte)



The Lightbulb Moment (Data first strategy Vs implementing a CRM system)



Holistic Decision Making – A data-first strategy integrates data across the organisation, providing a 360-degree view that enables informed, strategic decisions by identifying trends, inefficiencies, and opportunities beyond customer interactions.

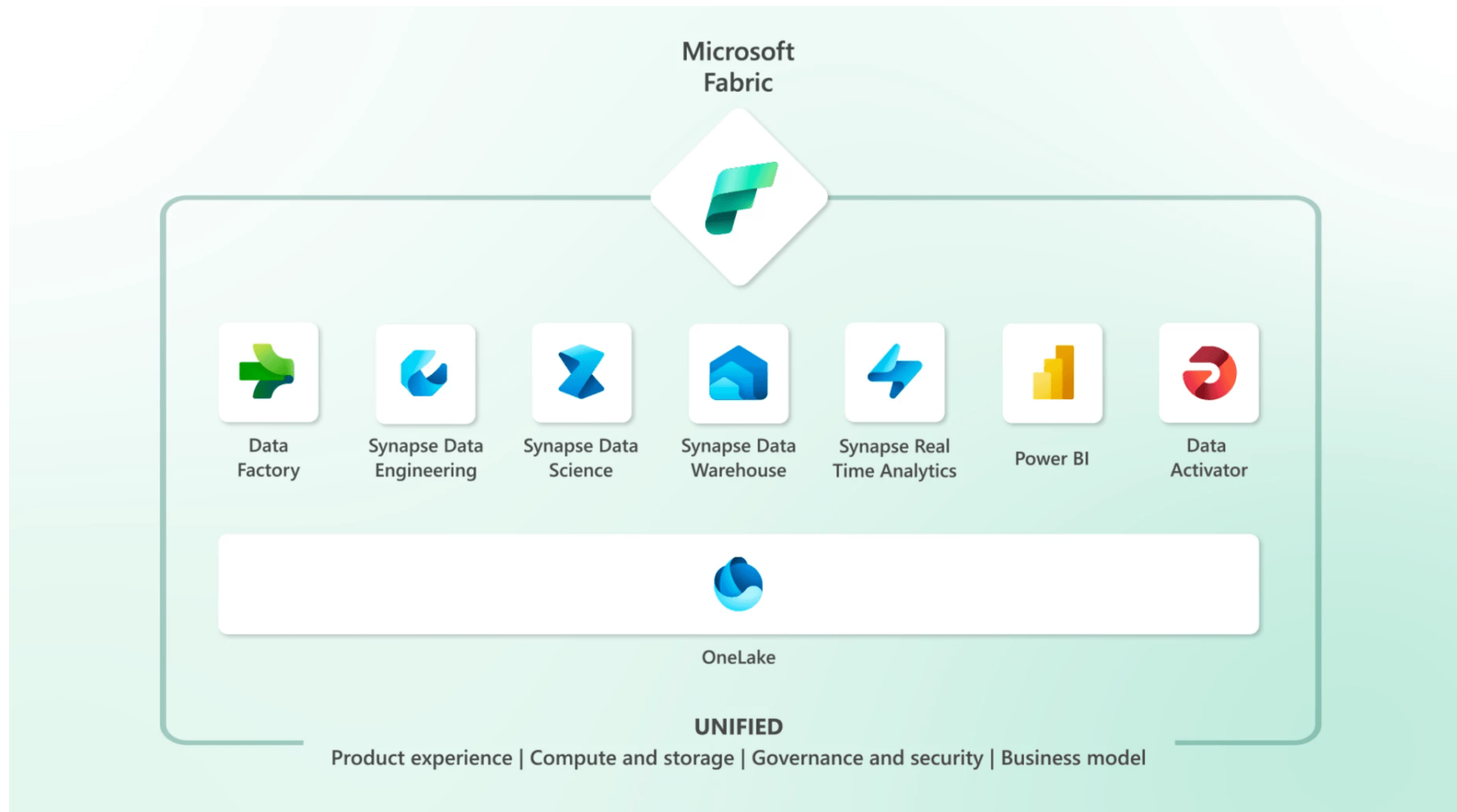
Flexibility and Scalability – A data-first approach enables custom solutions tailored to your organisation's unique needs and offers scalable architecture, allowing seamless growth and integration beyond the limitations of a CRM system.

Enhanced Data Governance & Security – A data-first strategy will centralise data management, enhancing governance, quality, consistency, and security, while providing greater control for compliance with regulations like GDPR.

Interoperability & Integration – A data-first strategy enables seamless integration of various systems for unified data flow, allowing cross-functional insights that go beyond the capabilities of a CRM focused solely on customer data.

Future-Proofing – A data-first strategy enhances adaptability to new technologies and fosters a data-driven culture, driving innovation, resilience, and competitiveness across your organisation.

Microsoft Fabric (Data First Approach)



Microsoft Fabric (Future Data Landscape)



Why the Data Lake Is Important?



A data lake complements and extends a data warehouse.



A data lake enables data science and advanced analytics.



A data lake can be a hub for data sharing or self-service access.



A data lake can provide fresh data for hourly operational reporting.

Data Acquisition



Insight, Discovery and Development



Optimisation and Governance

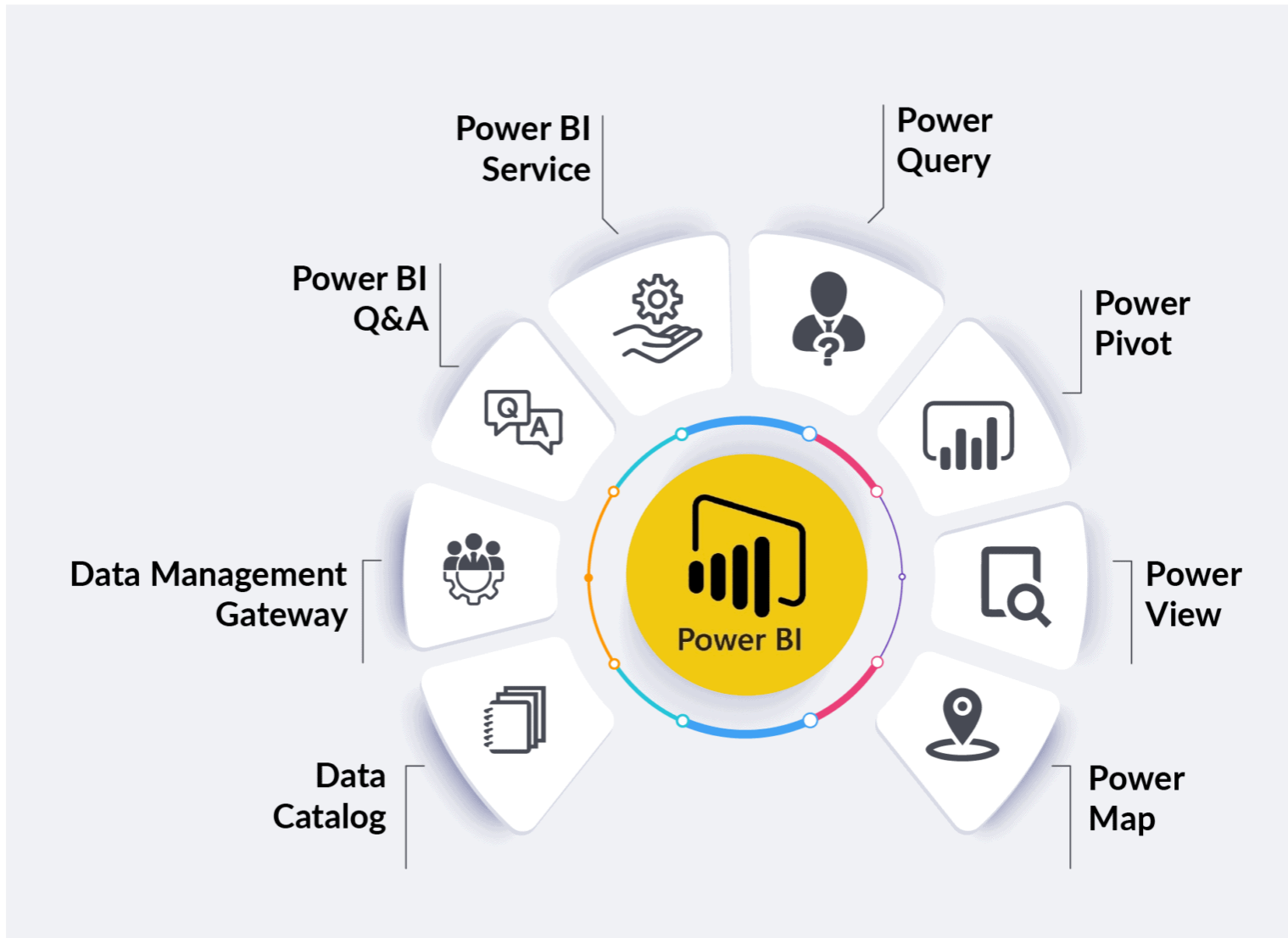


Analytics Consumption



A data lake is primarily for analytics, secondarily for modern data ingestion and refinement.

Self-Service Analytics - Power BI



Benefits of Power BI

Data Visualisation – Enables the creation of interactive and visually appealing dashboards and reports.

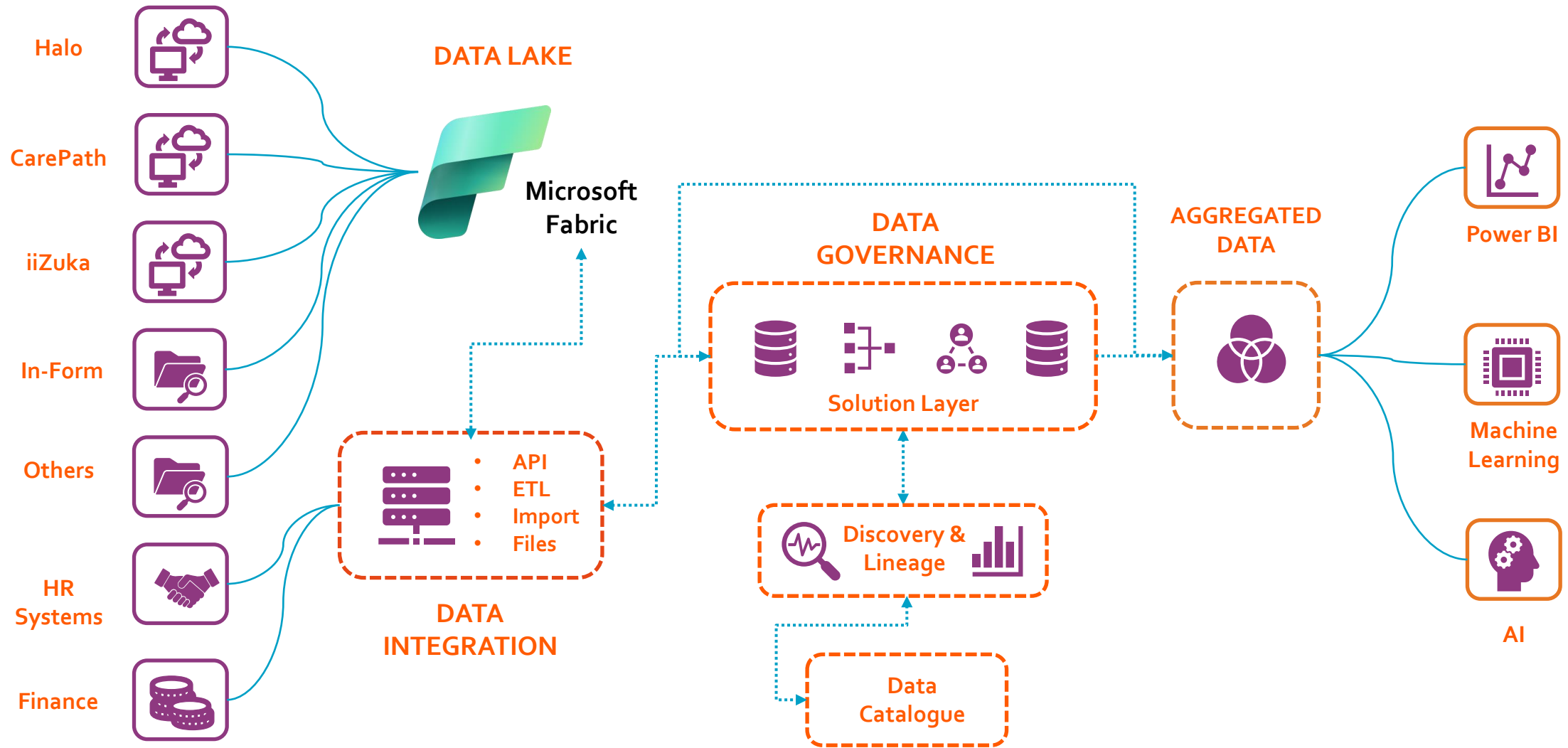
Data Integration – Seamlessly integrate with a wide range of data sources.

Real-Time Monitoring – Cranstoun can monitor KPI's and metrics in real time.

Predictive Analytics – Advanced analytics to help Cranstoun anticipate future trends and outcomes.

Scalability and Accessibility – A Scalable solution that can accommodate the growing data needs at Cranstoun.

Data Infrastructure Enhancement



Power BI Fusion with Co Pilot

Home

Create

Workspaces

CopilotTesting

Copilot-Internet-...

apartment_rentals

Copilot-AW-sample

...

Power BI

Copilot-Internet-Sales-AW

Confidential\Microsoft Extended

Search

FileViewReading viewMobile layoutOpen data model

Copilot

Internet Sales Analysis by Product Category and Geography

EnglishCountryRegionNameAllCategoryAll

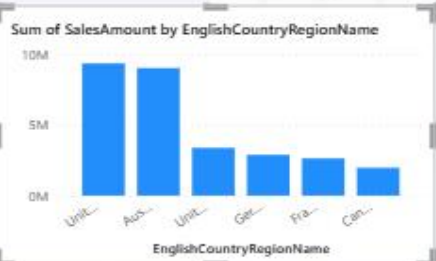
Count of Category
4

Count of EnglishCountryRegionName
6

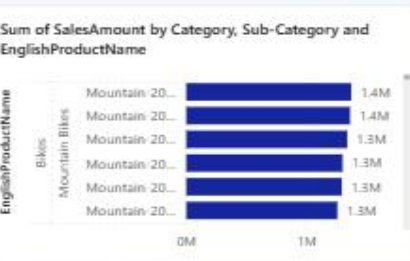
Sum of SalesAmount
29.36M

Revenue % of Sales
41%


Sum of SalesAmount by EnglishCountryRegionName




Sum of SalesAmount by Category, Sub-Category and EnglishProductName




Sum of SalesAmount by EnglishCountryRegionName




Sum of SalesAmount by EnglishPromotionType



Sum of SalesAmount by Sub-Category



Sum of SalesAmount by Date and Category



Filters

Visualizations

Data

CopilotPreview

Suggest content for this report

OK, here's a suggested outline for your report. Select any page topic to view details and start creating pages.

Sales Performance by Product

Customer Segmentation and Loyalty

Promotion Effectiveness and ROI

Inventory and Supply Chain Management

Describe the report you want or select the prompt guide for ideas

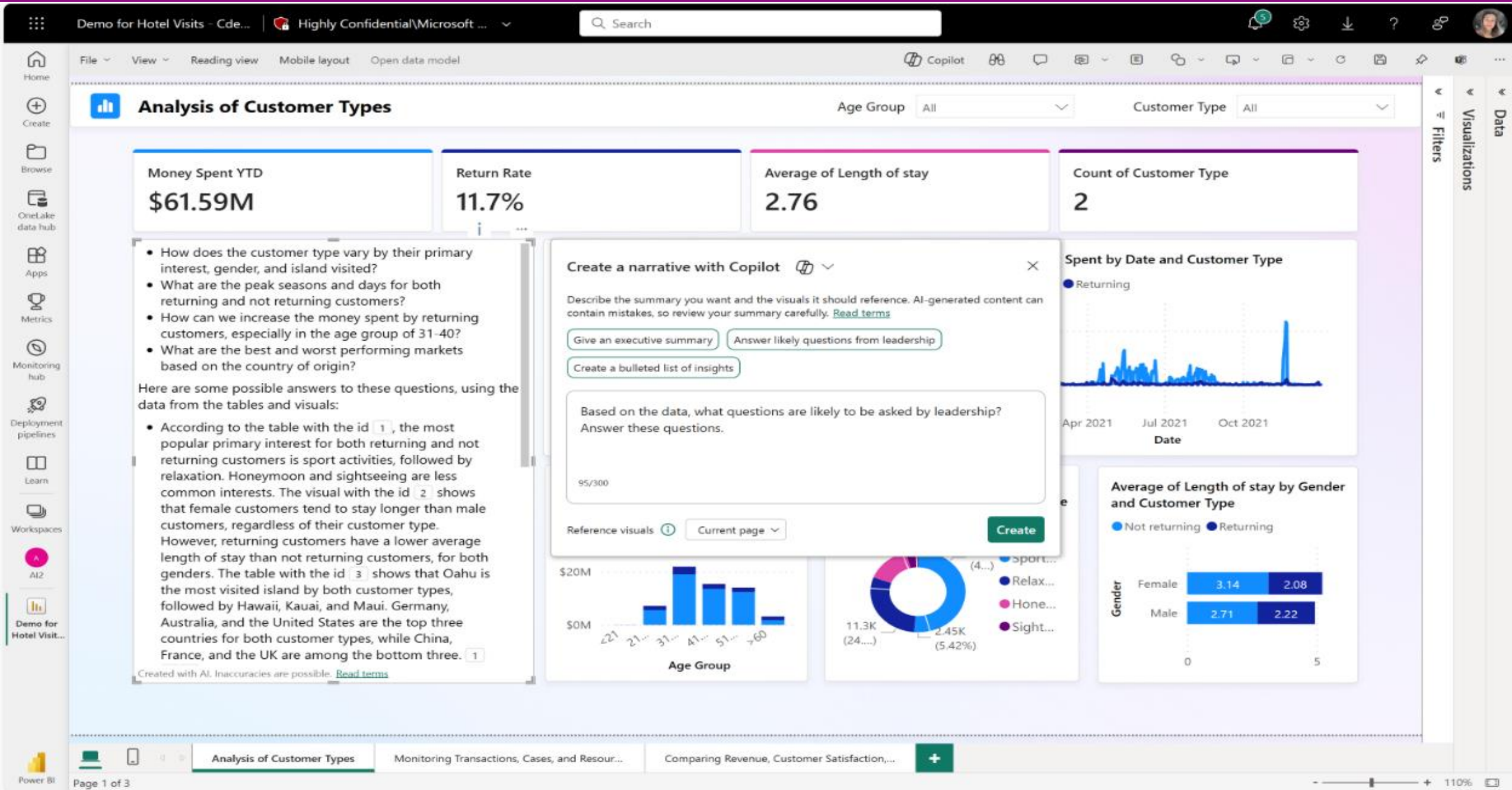
Content created by AI may not be accurate or appropriate, so review it carefully. [Read terms](#)

Internet Sales Analysis by Product Category and Geography

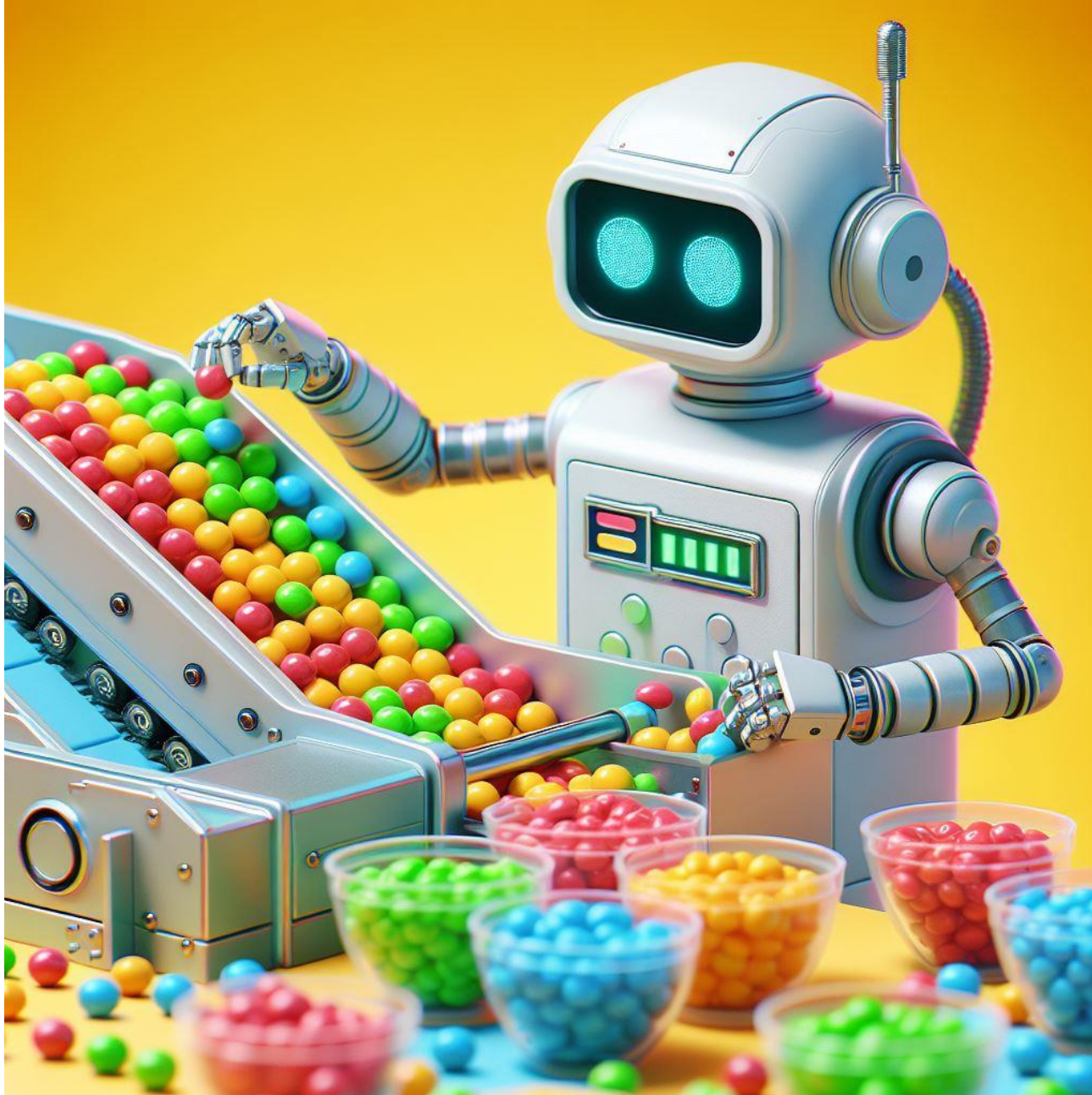
Page 1 of 1

56%

Power BI Fusion with Co Pilot



Using AI to sort our Datasets (Future Data Landscape)



Thank you

gseaman@cranstoun.org.uk

Spreading the Cranstoun message!

X/Twitter

[@Cranstoun_org](#)

Facebook

[Cranstoun - Home | Facebook](#)

Linkedin

<https://www.linkedin.com/company/cranstoun>

TikTok

[#cranstoun | TikTok](#)

www.cranstoun.org



CRANSTOUN
Empowering People, Empowering Change



Quick Q&A – pre-event topics and questions

Selected questions

- Caroline, RAF Benevolent Fund *“Trying to decide between Dynamics and Salesforce. Are there any other systems out there we should consider?” “What key roles should be established for project governance and project implementation for CRM / Grant management system”*
- Debbie, Blind Veterans *“Interested in how other organisations are handling organisational siloed data sources whilst appreciating that stakeholders have multiple relationships with the organisation”*

Selected questions

- Lisa, Royal Marsden *“Understanding of the tools that charities are having to use for supporter relationship management because their CRMs don't do it”*
- Alison, Tearfund *“Learning more about CDP and the experience of other charities when changing CRM. Integration of various platforms to have one single view of supporter engagement”*
- Joe, Carers Trust *“a good understanding of what the best, most suitable CRMs are available to charities”*

Selected questions

- Harriet, Vegan Society *“The best direction to go in with the future of our CRM. Advice on how to navigate teething problems with new CRMs. Quick ways to optimise/improve our CRM.”*
- Chris, Challenge Partners *“A better understanding of how I can scale up our charity's use of CRM (specifically Salesforce) in order to provide a better internal experience through efficiencies and a better partner (end audience) experience too - with more options for sign-ups / selections / marketing / better UX etc”*

Event feedback

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





Grant management solutions and selection

Thursday 31st October 2024 at 14:00 GMT

Virtual Zoom event - 14.00-15.15 ,

£0.00 30

There are many suppliers and software packages available to the sector designed to meet the key requirements for managing relationships with beneficiaries, members and other types of contacts, but how do you choose the system that best supports grant-making activities? Hear from Adapta's Libby Hare and Mark Luckins in this live webinar and Q&A session as we look at the choices and challenges in selecting software to manage grants to other organisations and individuals.



People and technology

Thursday 21st November 2024 at 14:00 GMT

Virtual Zoom event - 14.00-15.15 ,

£0.00 100

In a world where technology is becoming more pervasive, where your staff have increasingly easy access to on-line tools and content, where hybrid working begets investment into intangible digital assets rather than physical space; where the skills you need are ever changing and difficult to source how can you ensure your people strategy is fit for the digital age?



CRM in a modern membership organisation

Wednesday 11th December 2024 at 14:00 GMT

Virtual Zoom event - 14.00-15.15 ,

£0.00 30

Hear from Adapta's Keith Collins and Mark Luckins as we look at the latest in how membership organisations and associations are adopting CRM solutions to modernise their organisation. In this live webinar and Q&A session we will hope to demystify the topic of CRM, share with you our latest thoughts on the CRM marketplace, and share some highlights and insights from our recent work helping organisations specify, select and implement new CRM solutions .

Thanks & Goodbye!

www.adaptaconsulting.co.uk/upcoming-events



help@adaptacconsulting.co.uk



www.adaptaconsulting.co.uk



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020 7250 4788

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