CRM, Customer Data and Cake

27 September 2023

How well does your data let you understand your supporters?

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processes, people and technology

Making Digital Real

- 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

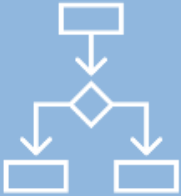- Our advice and guidance is based on **practical experience** gained over many years

Depth and breadth

Digital, Data & Technology Strategies	Reviews & Health Checks	Business Processes & System Requirements
Supplier & Solution Selection	Interim Technical Leadership	Programme & Project Management
Risk, Compliance, Data Protection & Security	Governance & Business Cases	Change & Organisational Development

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Our Mission and Purpose

Our Mission

We **empower** organisations to deliver transformational impact through more effective use of technology and ways of working

Our Purpose

From **our minds to your minds** – our team of experienced, independent consultants work with you to transfer their knowledge, share their expertise, and **develop your organisational capability**

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Programme

14:00   **Arrival and welcome**
Welcome - introductions and overview of the agenda for the afternoon.

14:10   **A potted history of customer data and CRM! Why are third sector organisations still failing to realise true 360 data models through CRM?**
Keith Collins & Gary Seaman, Adapta Consulting

14.30   **JDRF Experience. A video.**
Hayley Perez, Head of Individual Giving and Stewardship
Onyeka Onochie, Database and Insights Manager

14.45   **MSF Experience**
James Kliffen, Director of Fundraising, Médecins Sans Frontières / Doctors without Borders (MSF)

15.15   **Tea/Coffee and cake**

15:45   **The future of customer data and CDP? What the market is now claiming….**
Mark Luckins, Adapta Consulting

16.00   **Roundtable discussion - All**

16.45   **Review and close –** Keith Collins, Adapta Consulting

FIRE

BREAK GLASS
→ ● ←
PRESS HERE

Confessions of a FORMER CRM salesman...

How 'CRM' was sold...

Single Customer View? ☑

Single Customer View? ☑

Supporter Journeys ☑

Single Customer View? ☑

Supporter Journeys ☑

Manage all my data ☑

And it would be…

Proprietary products

- Integration challenges
- Over-reliance upon manual data imports and exports
- Built to support the way things were in the late 90s/early 00s
- Bias towards fundraising

REALITY CHECK AHEAD

CRM Platforms

- Provider naivety *"Isn't fundraising just sales?"*
- Partner naivety *"charities must be simple, surely?"*
- Partner scale and skills
- Limitations – data volumes, API calls
- Product gaps – e.g. prior to acquisition of Buddy Media & Radian 6 > SFMC

Organisational readiness

- Experience of large, complex projects
- Governance and management challenges
- Skills gaps – data, integration, digital, agile?
- Cultural stuff?

Single Customer View? ☑

Supporter Journeys ☑

Manage all my data ☑

Proprietary products

☑

Some newer ones:
- Have got much better at integrating with digital fundraising, marketing automation etc
- Offer a much-improved UX
- Are more extensible

CRM platforms

☑

Good news:
- Partners with scale, who can handle the complexity
- More tools within the platforms – ETL/ELT, data management

But there's more to non-profit customer data management than just CRM…

Evolution of CRM Systems

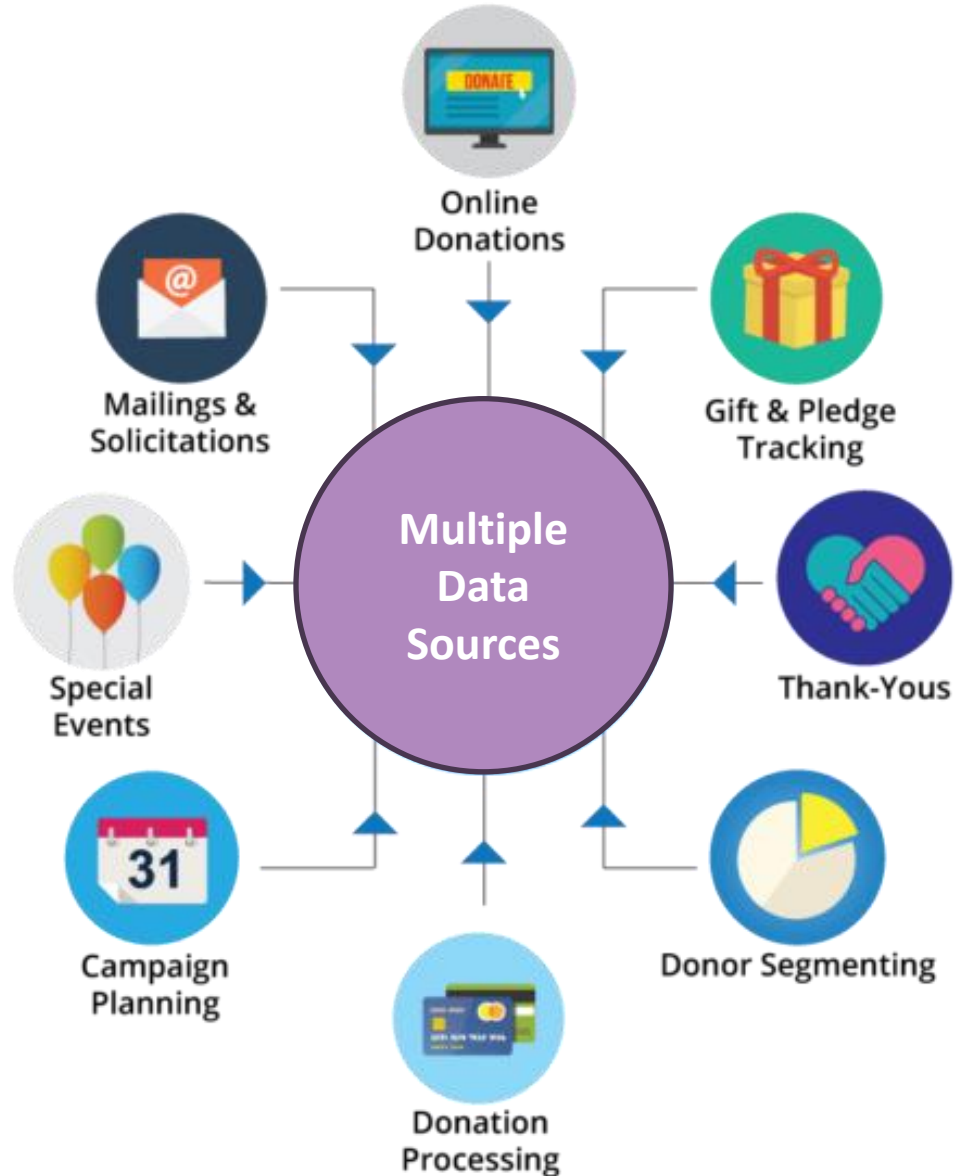## Journey from Data Entry systems to Artificially Intelligent CRMs

Past

Present

Future

Identity Data
- Name
- Email
- Phone
- Address

Descriptive Data
- Events
- Interests
- Cases/Needs

Online Donations

Mailings & Solicitations

Gift & Pledge Tracking

Special Events

Multiple Data Sources

Thank-Yous
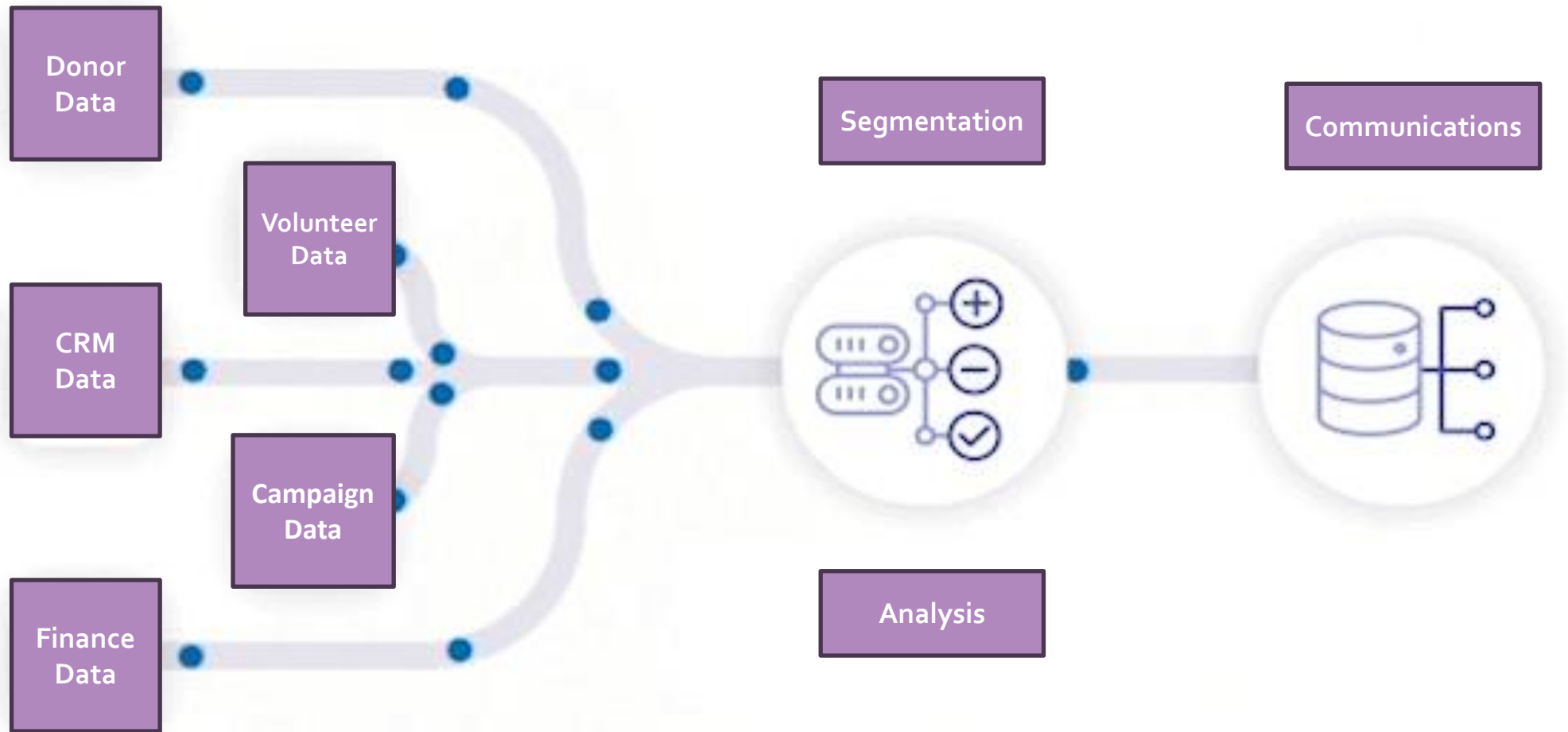
Campaign Planning

Donation Processing

Donor Segmenting

Qualitative Data
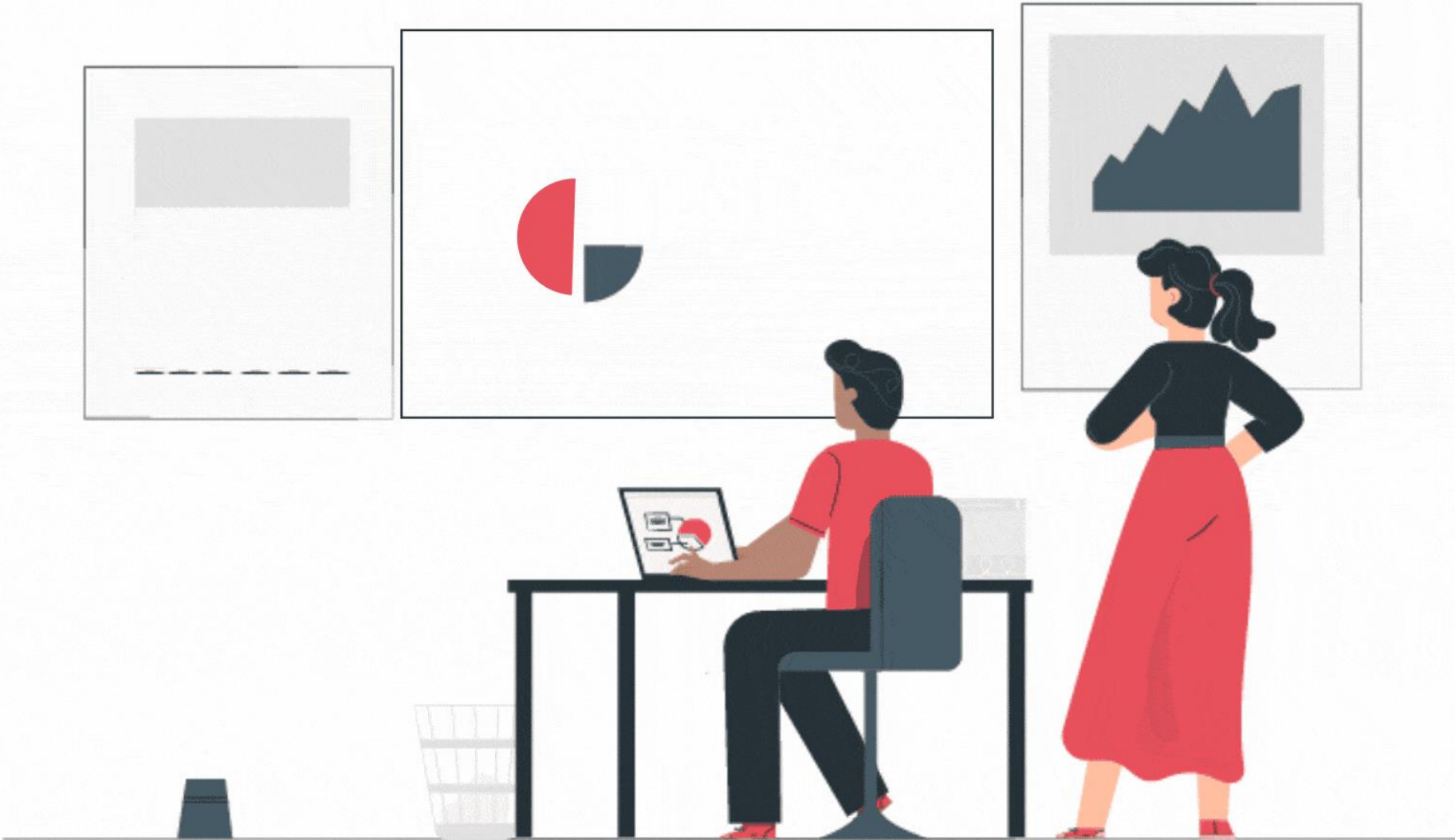- Feedback, Surveys
- Service Engagement
- Transactions

Quantitative Data
- Donor history
- Campaign acquisition/attribution
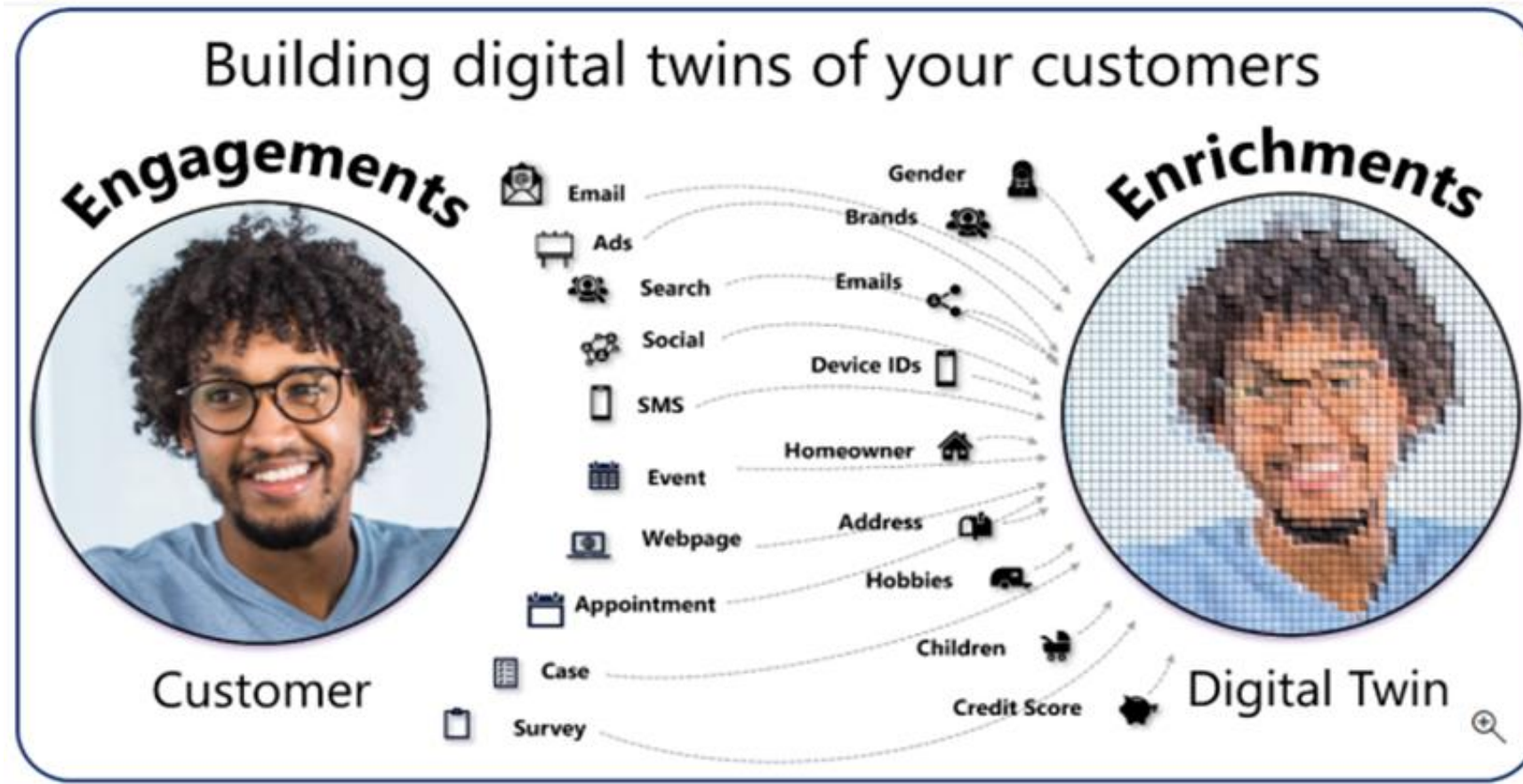- Email clicks (maybe…)

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Segmentation/selections often happen outside CRM and provided to marketing teams or imported into marketing automation tools

And the final piece would be reporting and analysis

What does a 360 supporter view look like?

Building digital twins of your customers

Engagements — Customer
- Email
- Ads
- Search
- Social
- SMS
- Event
- Webpage
- Appointment
- Case
- Survey

Enrichments — Digital Twin
- Gender
- Brands
- Emails
- Device IDs
- Homeowner
- Address
- Hobbies
- Children
- Credit Score

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JDRF
IMPROVING LIVES. CURING TYPE 1 DIABETES.

CRM & Cake

HAYLEY PEREZ & ONYEKA ONOCHIE

September 2023

Benefit & Value

| Good data quality – for reliable insights & analysis | Integration and Automation – reduce manual processing | Tailored supporter journeys and communications – excellent engagement & fundraising | Good data quality – for reliable insights & analysis |

Where we are now

Donorfy Go Live May 2023:

- Phase 1 – BAU
  - Training
  - Business critical processes
  - Issues log and fixes

- Phase 2 – Improvement and benefits
  - Integrations and Automations
  - Ongoing Data Quality
  - Data Governance framework
  - Insights & Analytics
  - Digital Marketing

HOW IT'S GOING

Impact

"The new CRM is going to completely transform the way we work in the Philanthropy team. Over the last few months, we have already identified a number of new processes that are streamlining the way we work, freeing up our time to work on raising life-changing funds for type 1 research"

Rachel, Philanthropy Manager

Value so far

- Putting data in everyone's hands
- Data is useful, not a chore
- Less manual processes
- We're on the road!

Technology, Processes & Culture

The path to driving value from our data

Culture

- Nurture curiosity
- Democratize data
- 'Test & Learn'
- Adapt

JDRF

WE'RE ALL ON THIS JOURNEY TOGETHER

JDRF

THANK YOU

Hayley Perez

Head of Individual Giving & Stewardship

hperez@jdrf.org

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DOCTORS WITHOUT BORDERS

Our need for funds

- **Independent** of political, religious, news agenda, or other interests.

- **Unrestricted.** Funding that is available for MSF to use where needed.

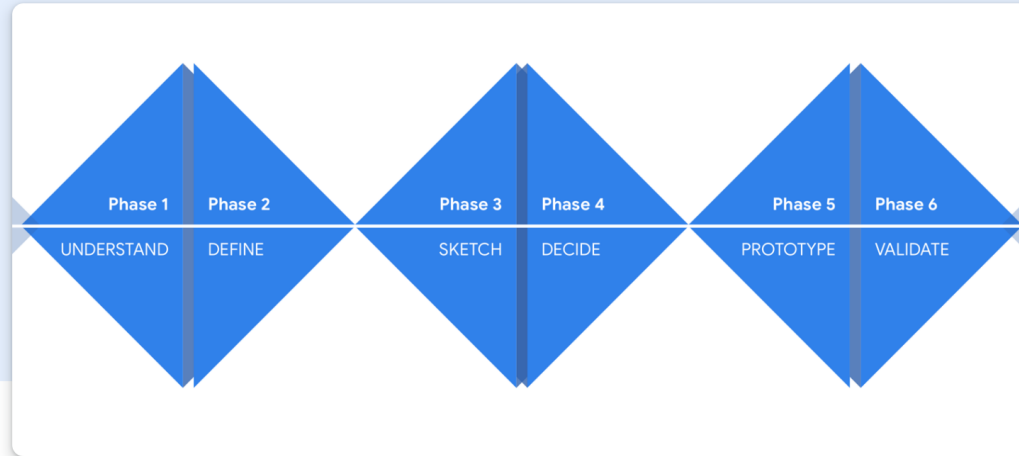- **Secure.** Available to be used when needed.

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Design Sprint Methodology

The Design Sprint follows six phases: Understand, Define, Sketch, Decide, Prototype, and Validate.

Resources
Submit To The Kit

While it is recommended to include all six phases of the methodology, there are certainly situations where you might want to run a shorter workshop utilizing these methods. These methods can help align a team on the right problem to solve or provide actionable solutions to a tightly scoped to challenge that can be tested with users at a later date.

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ما هي الحالات التي تستدعي تنظيف اليدين؟

*ملاحظة: يجب تنظيف اليدين في كل الأوقات المشار إليها بغض النظر عما إذا كانت القفازات مستخدمة أم لا.

1 قبل لمس مريض

متى؟ نظف يديك قبل لمس المريض؛ وقبل المصافحة وقبل مساعدة المريض في أداء مهام الاعتناء بالنفس، وإرتداء الملابس، وما إلى ذلك، وقبل وضع قناع الأكسجين، وقبل قياس النبض، وضغط الدم، والفحص بالسماعة، وإجراء تخطيط القلب الكهربائي.

لماذا؟ لحماية المريض من الجراثيم الضارة التي تحملها يديك.

2 قبل إجراء يستدعي التعقيم

متى؟ نظف يديك مباشرة قبل قيام بأي إجراء يستدعي تقنية نقية، مثل إدخال أداة طبية في الجسم (تقنية أنبوب أنفي معدي، أنبوب داخل القصبة الهوائية، قسطرة بولية، أو قسطرة الوريد) الأطعمة أو الأدوية...

لماذا؟ لحماية المريض من الجراثيم الضارة، بما في ذلك الجراثيم التي تأتي منه، من دخول جسمه.

3 بعد التعرض لسوائل الجسم

متى؟ نظف يديك بعد التعرض مباشرة لسوائل الجسم أوبعد إزالة القفازات؛ بعد إدخال جهاز طبي غازي، بعد إزالة أحد الأجهزة الطبية الغازية، بعد التعامل مع عينة تحتوي على مادة عضوية، بعد إزالة الفضلات وأي سوائل أخرى من الجسم، بعد تنظيف أي سطح ملوث ومواد منسقة (أغطية الأسرة المنسقة، الأدوات، المبولة، وعاء البول بالفراش).

لماذا؟ لحماية نفسك وبيئة الرعاية الصحية من جراثيم المريض الضارة.

4 بعد لمس مريض

متى؟ نظف يديك بعد لمس المريض ومحيطه المباشر لدى مغادرة المساحة المخصصة له، مثل إدخال أداة طبية بعد مساعدة المريض في أداء مهام الاعتناء بالنفس، وبعد أي عمل قدمت فيه الرعاية له وأي إجراء غير غازي: وضع قناع الأكسجين، وقياس النبض، وضغط الدم، وإجراء تخطيط القلب الكهربائي.

لماذا؟ لحماية نفسك وبيئة الرعاية الصحية من جراثيم المريض الضارة.

5 بعد لمس محيط المريض

متى؟ نظف يديك بعد لمس أي غرض أو أثاث في محيط المريض المباشر عند المغادرة حتى إن لم تلمس المريض وبعد تغيير أغطية السرير وتنظيف طاولة السرير وبعد تعديل سرعة التروية...

لماذا؟ لحماية نفسك وبيئة الرعاية الصحية من جراثيم المريض الضارة.

- ما تكتم مشاعرك خوفا من أحكام الآخرين، الحالة النفسية أو لفرض النفسي مثل أي مرض أو حالة طبية جسدية تستدعي ستشارة وقد تحتاج إلى دواء

- لخطوة الأولى، تحدث إلى المستشار النفسي الذي يمكنه تقييم الحالة ومساعدتك أو الذي يمكنه تحويلك إلى طبيب مختص

- المهم، لا تأخذ أي دواء من دون وصفة طبيب نفسي

إذا كنت بحاجة لمساعدة ولحدا ولحدا يسمعك، فإن مستشاري الصحة النفسية

في أطباء بلا حدود موجودون هنا لمساعدتك

لا تتردّي بطلب الاستشارة النفسية

نحن هنا لأجلك

MÉDECINS
SANS FRONTIÈRES
أطباء بلا حدود

Monday 11-07-2022 11:35

2022 Award winners spotlight: Grand Prix and Digital Expert of the Year Awards

David Murphy

All this week, we are taking a closer look at the winning campaigns and platforms in the 6th edition of the Effective Digital Marketing Awards. The winners were announced at an Awards Ceremony held last Friday. We start with a look at the winners of the Grand Prix Award and out two Digital Exert of the Year Awards.

Grand Prix

Overview of our current data flows - ALL

Swimlanes (top to bottom): OTHER AGENCIES, EMAIL, MSF OFFICE, Woods Valldata, ONLINE, SMS

OTHER AGENCIES: Angel, Formunauts, Payroll Agencies, PGMS, CAF, CADF & CAF America, MBA, Amex (Woods Valldata), Cardnet 08 (Woods Valldata), Cardnet 20 (Angel), PFO's, Tax efficient giving agencies, BACS, HMRC

EMAIL: Campaigner

MSF OFFICE: Bank Transfers, White Mail, MSF Office, Dynamics CRM database, BOS £ = 4518, BOS £ = 5873, BOS € = 4493

Woods Valldata: Campaign responses, Response

ONLINE: PayPal Account 1, MSF website, Braintree, Third Party Platforms, PayPal Giving Fund, PayPal Account 2, Greetings Card Company

SMS: CYMBA

Search

James Kliffen - Saved
Contact

699115
Contact ID

LDN-CRM PROD
Owner

Active
Status Reason

Save | Save & Close | New | Open org chart | Deactivate | Connect | Add to Marketing List | Share

Summary | Activities and Communications | Addresses | Consent and Preferences | Income & Tax | Regular Donations | Relationships | ...

Name

Name

Title
✉️ **Mr**

First Name*
James

Last Name*
Kliffen

Suffix

Contact Information

Email
~~███████████████~~ ✏️

Email - Secondary

Email - Tertiary

Mobile Phone

Relationship Summary

🔒 ---

🔒 Status
Completed

🔒 At
03/08/2020 📅

18:00

Recruitment

Source Campaign * 📣 **7251/Fun Run 2016**

Recruitment Date * 11/08/2016 📅

Representing

Represents themselves — 🟢 Yes

Represents an Organisation — ⚪ No

Represents another Contact — ⚪ No

Suspected Vulnerable Supporter

🔒 Suspected Vulnerable Supporter
No

🔒 Suspected Vulnerable Supporter Notes
******

Gone Away and Deceased Details

🔒 Gone Away Date
--- 📅

Status Reason
Active

🔒 Gone Away Reason

🔒 Deceased Notification Date
--- 📅

🔒 Deceased Notification Details

Sidebar navigation

Home
Recent
Pinned

My Activities
Activities
Tasks
Dashboards
Queues

Supporter Management
Contacts
Accounts
Connections
Cases

Event Management
Events
Event Participants
Event Teams
Orders
Order Products

Campaign Management

MM Main Menu

Technology – continual diverse change

**2023 Gartner Emerging Technologies and Trends Impact Radar**
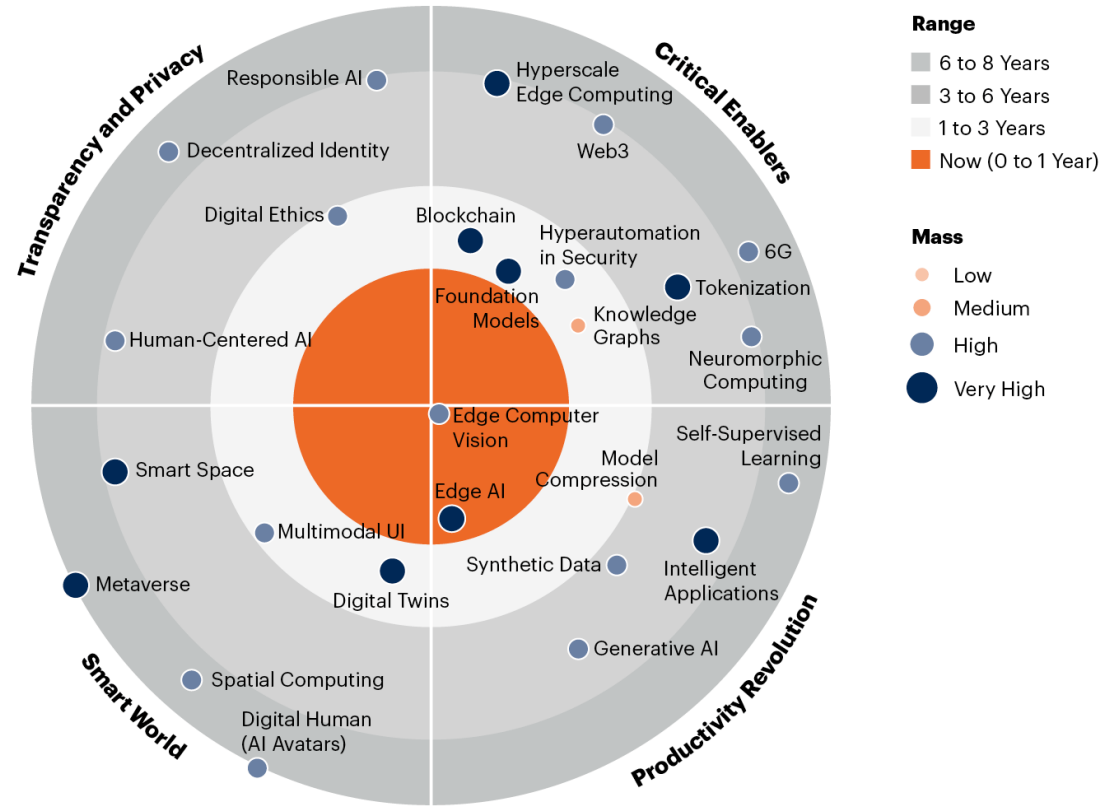
gartner.com

Note: Range measures number of years it will take the technology/trend to cross over from early adopter to early majority adoption. Mass indicates how substantial the impact of the technology or trend will be on existing products and markets.

Source: Gartner
© 2023 Gartner, Inc. All rights reserved. CM_GTS_2034284

Gartner®

Technology – Open Banking
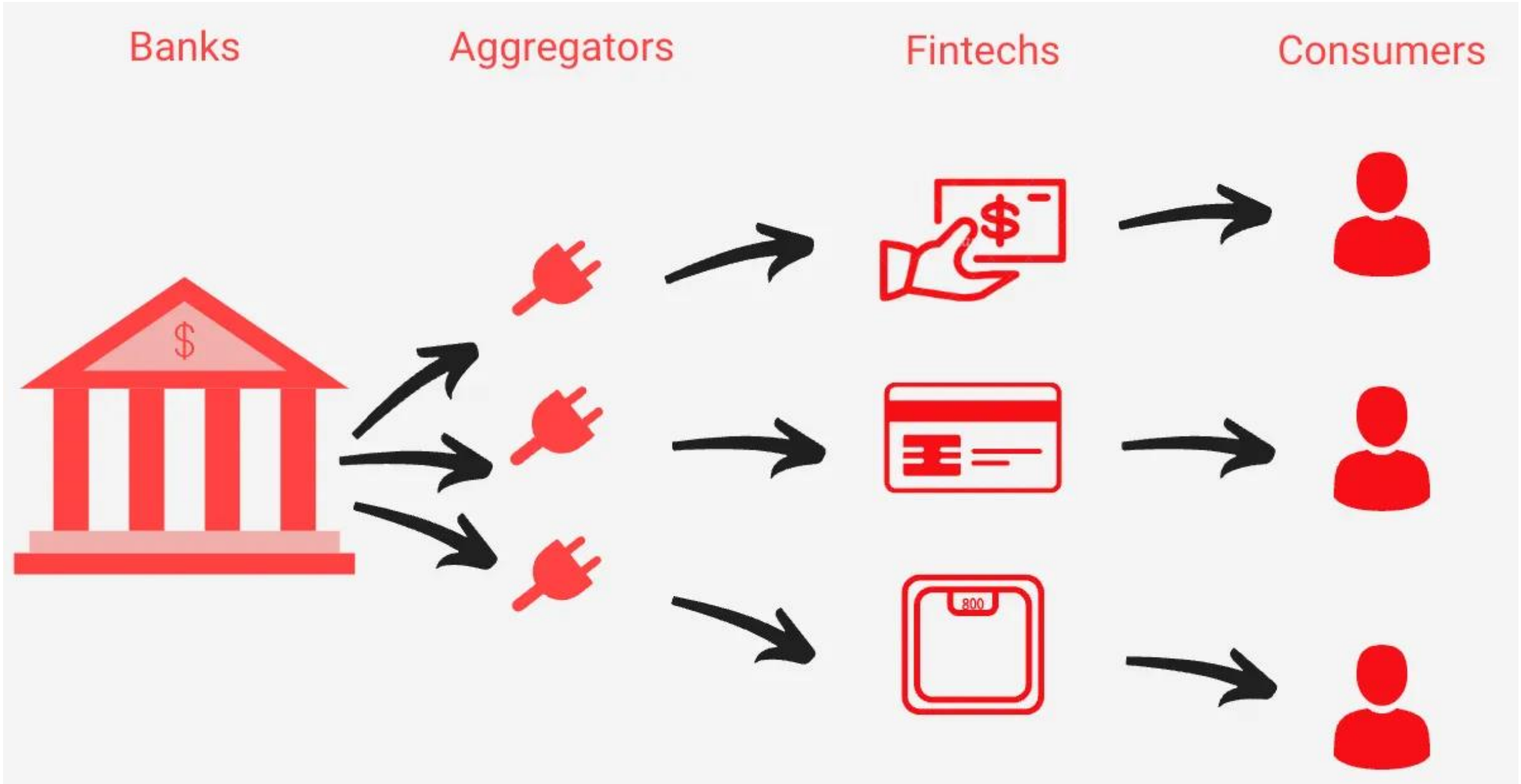
Technology – the rise of A.I.

Microsoft's recently launched Azure OpenAI service on Thursday received Federal Risk and Authorization Management Program high authorization, giving federal agencies who manage some of the government's most sensitive data access to powerful language models including ChatGPT, FedScoop has learned.

The authorization will allow government departments' cloud apps to integrate with and adapt models including GPT-4, GPT-3.5, and DALL-E for specific tasks, including content generation, summarization, semantic search, and natural language-to-code translation.

FedRAMP is a security framework that allows cloud providers to obtain governmentwide authorization for their products. The high authorization permits the use of a product in cloud computing environments that hold some of the government's most sensitive, unclassified data, such as data held by law enforcement agencies or financial regulators.

Microsoft in early June launched its Azure OpenAI Service for the government to allow federal agencies to use powerful language models to run within the company's cloud service for U.S. government agencies, Azure Government.

SHARE

More Like This

Lawmakers introduce bipartisan bill to create a federal AI research resource

BY **MADISON ALDER**

Energy Department awards $11.7M for quantum computing research projects

BY **JOHN HEWITT JONES**

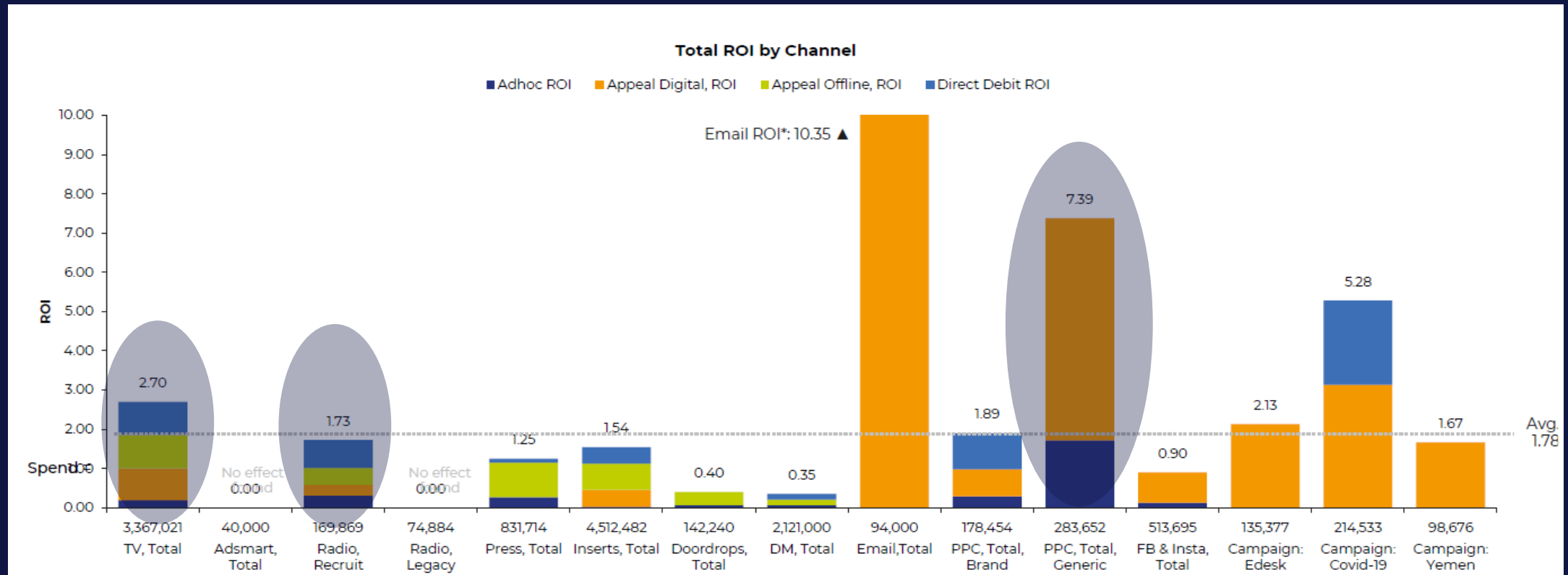USAID delivers drones to Ukraine to help document war crimes

BY **MADISON ALDER**

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TV & Generic PPC followed by radio stood out as channels with potential for good ROIs and headroom

Total ROI by Channel

Legend: ■ Adhoc ROI ■ Appeal Digital, ROI ■ Appeal Offline, ROI ■ Direct Debit ROI

Email ROI*: 10.35 ▲

Spend	ROI
3,367,021 — TV, Total	2.70
40,000 — Adsmart, Total	0.00 (No effect found)
169,869 — Radio, Recruit	1.73
74,884 — Radio, Legacy	0.00 (No effect found)
831,714 — Press, Total	1.25
4,512,482 — Inserts, Total	1.54
142,240 — Doordrops, Total	0.40
2,121,000 — DM, Total	0.35
94,000 — Email, Total	10.00+
178,454 — PPC, Total, Brand	1.89
283,652 — PPC, Total, Generic	7.39
513,695 — FB & Insta, Total	0.90
135,377 — Campaign: Edesk	2.13
214,533 — Campaign: Covid-19	5.28
98,676 — Campaign: Yemen	1.67

Avg. 1.78

M.i. media

Summer's here, but July could bring extra clouds for marketers.

This month, Apple and Google are both expected to introduce new privacy changes when they debut new versions of their platforms. With iOS 17 — which expands to public beta in July before the official launch in September — Apple will start automatically removing link trackers from URLs sent via Message and Mail as well as from links in Safari Private Browsing. Meanwhile, Google is moving forward with its own privacy changes by rolling out new APIs to Chrome and kicking off an 18-month roadmap for Privacy Sandbox.

By having Safari 17 block "known trackers and fingerprinting," Apple will boost user privacy protections and make it more difficult to identify individual users. However, some marketers say removing URL parameters could make campaign analytics less reliable. Some of the "unintended impact" changes could include URL trackers related to ad measurement, embedded media, social widgets, fraud prevention, bot detection, audience measurement and funding websites that rely on targeted or personalized ads.

Although it's unclear how both changes will impact advertising in the coming weeks and months, the updates will be closely tracked in an industry navigating an increasingly hazy world of advertising. (Apple is offering alternative tools like private click measurement, but some adtech experts see the alternative as too complicated or viable enough to drive long-term adoption.)

One ad-tech exec who works closely with Apple told Digiday they're "sure glad I'm not a website analytics provider."

It might take some time before marketers see what kind of effect the changes will have, and the impact isn't expected to be as big as Apple's other recent efforts like IDFA.

CRM

Synapse
Link

BC

Google GA

Digital Marketing

ONS

House Files / Outbound / Internal System data

Azure Data Pipelines

Data Lake Gen2

Azure Synapse
Analytics

User Accessible Reporting Data

Machine Learning

Cognitive Services

AI Builder

AI Model / KPI's

Power BI

Excel

Global Reporting
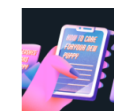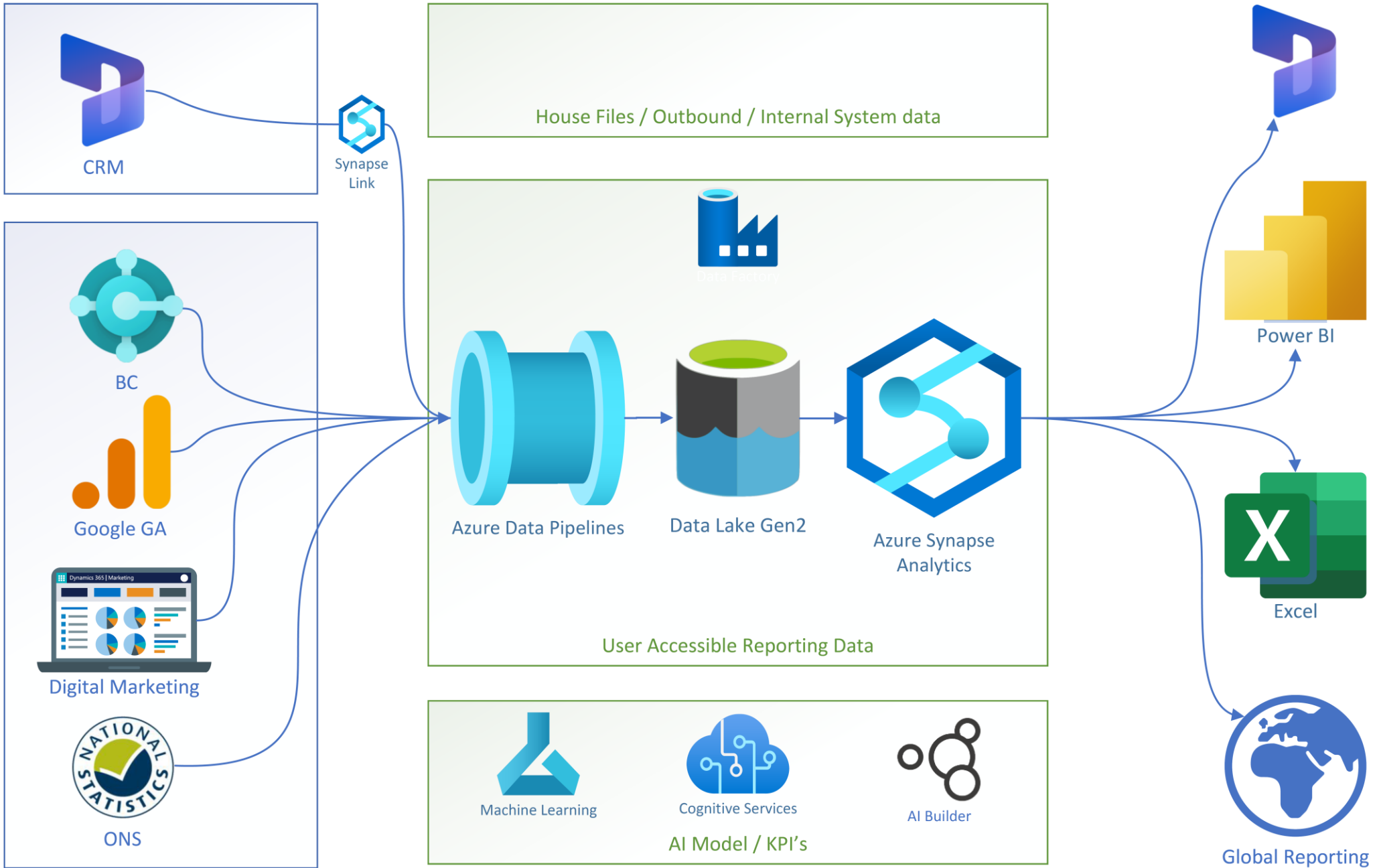
MSF UK – Strategic priorities 2024-26

- Leverage multi-channel integration across all marketing activities, 365 days a year, to produce cash and mid-value income, with incremental uplift for regular giving

- Data insight using CRM & Digital sources to drive improved effectiveness of individual supporter communications across all channels (segmentation, personalisation, triggered communications)

- Development of A.I. and Machine Learning (Data Warehouse, Digital Analytics)

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Anyone for cake?

Why do I want one?

Who might be interested in our organisation?

Who might be willing to give for the first time?

Who might give again and how much?

Who might become a regular giver?

What regular givers are at risk of lapsing?

More confidence in automation

What worked?

Improved Targeting

Responsive journeys

Improved Personification

Notifications

(Paid) Social

E-Mail
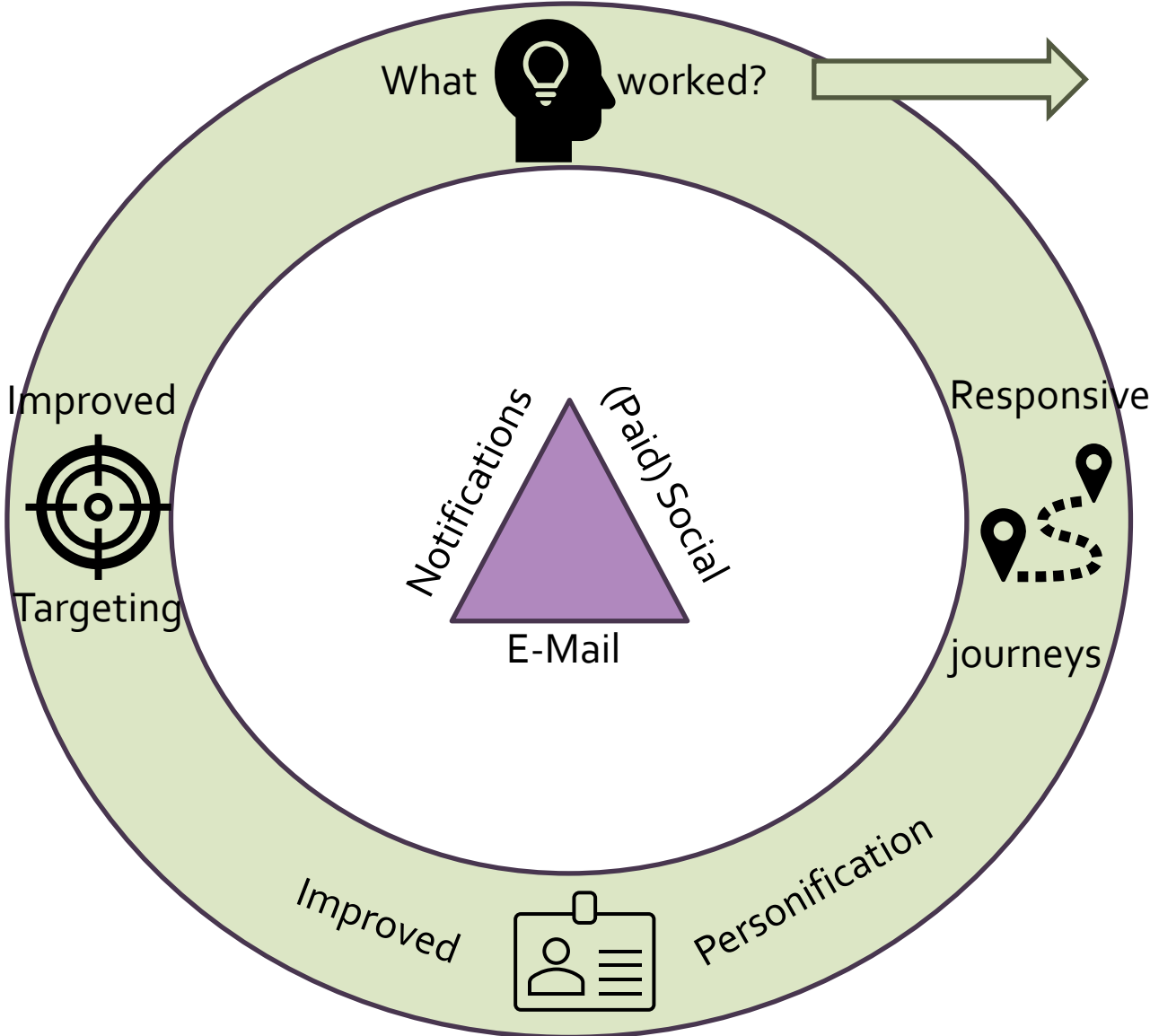
So what is a "Customer Data Platform"?

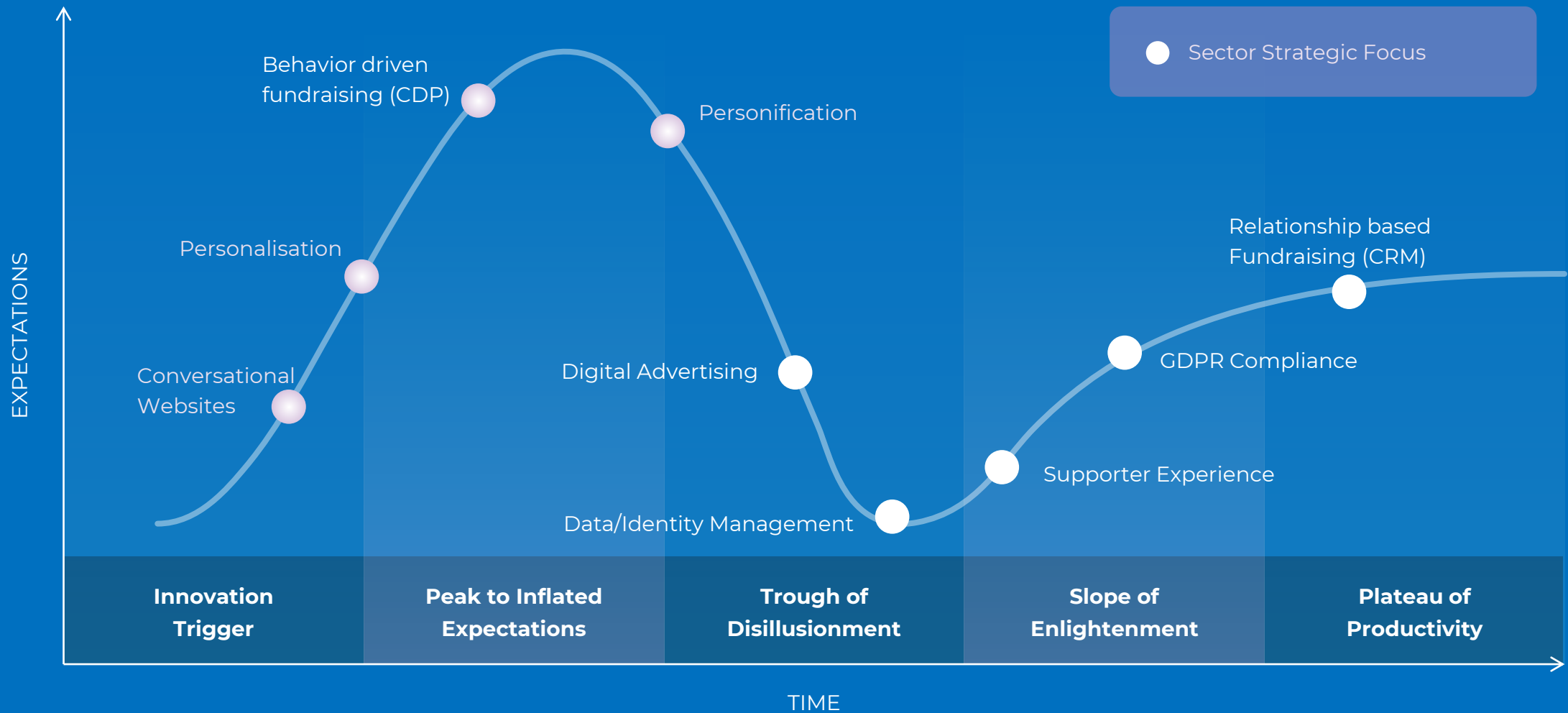| Difference	CRM	CDP
Data Perspective	1. Mostly demographic, firmographic and transactional data. 2. Allows manual data entry.	1. Adds digital behavioural data to each supporter record. 2. Adds "unidentified visitors". 3. Does not allow manual data entry.
Technology Perspective	A single system.	A single system with integration tooling and omni-channel marketing tools
People Perspective	1. Of most value to fundraising team (esp relationships with higher value individuals and organisations) 2. Often needs "data staff" to do imports and de-duplication.	1. Of most value to digital marketing and fundraising (esp relationships with individual/mass giving) 2. No ongoing data staff or de-duplication once setup
Privacy Perspective	GDPR Compliant (given appropriate privacy statements et al)	GDPR compliant if associated with updated privacy notice and robust consent/communication preference management capabilities.

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And what can it do?
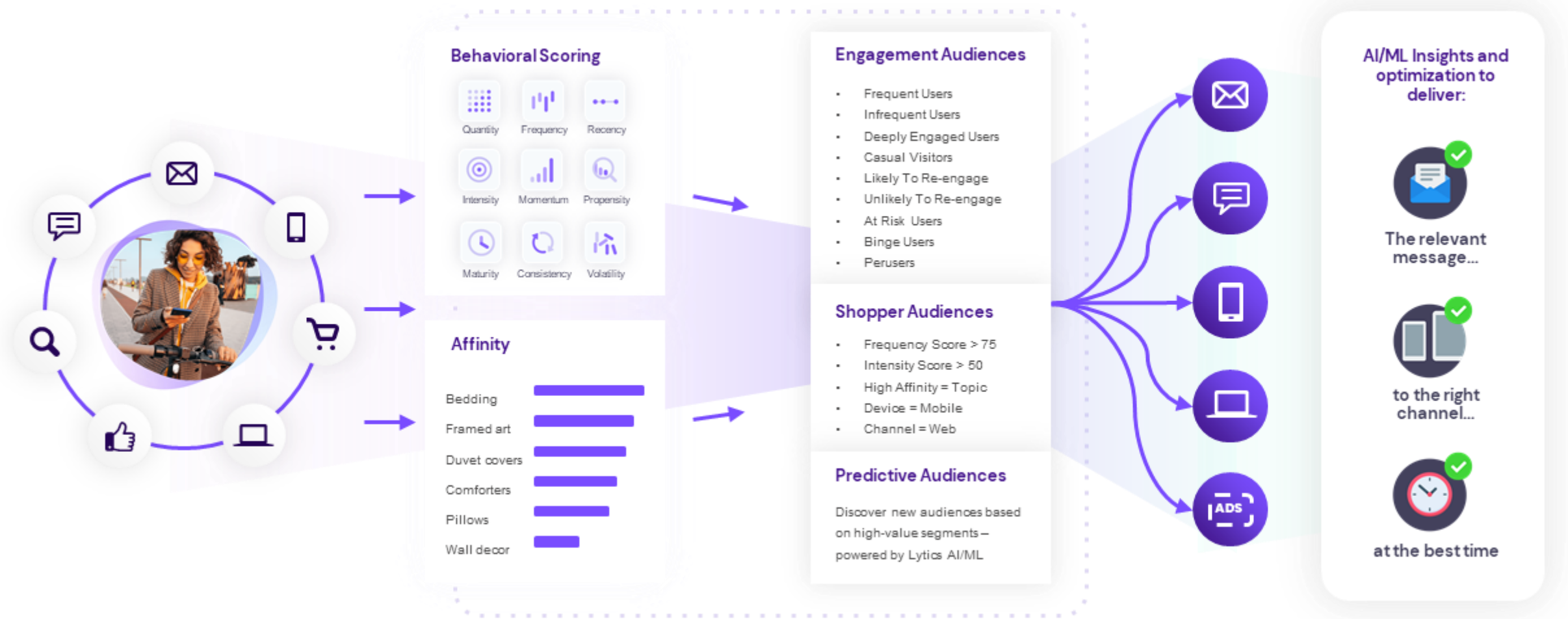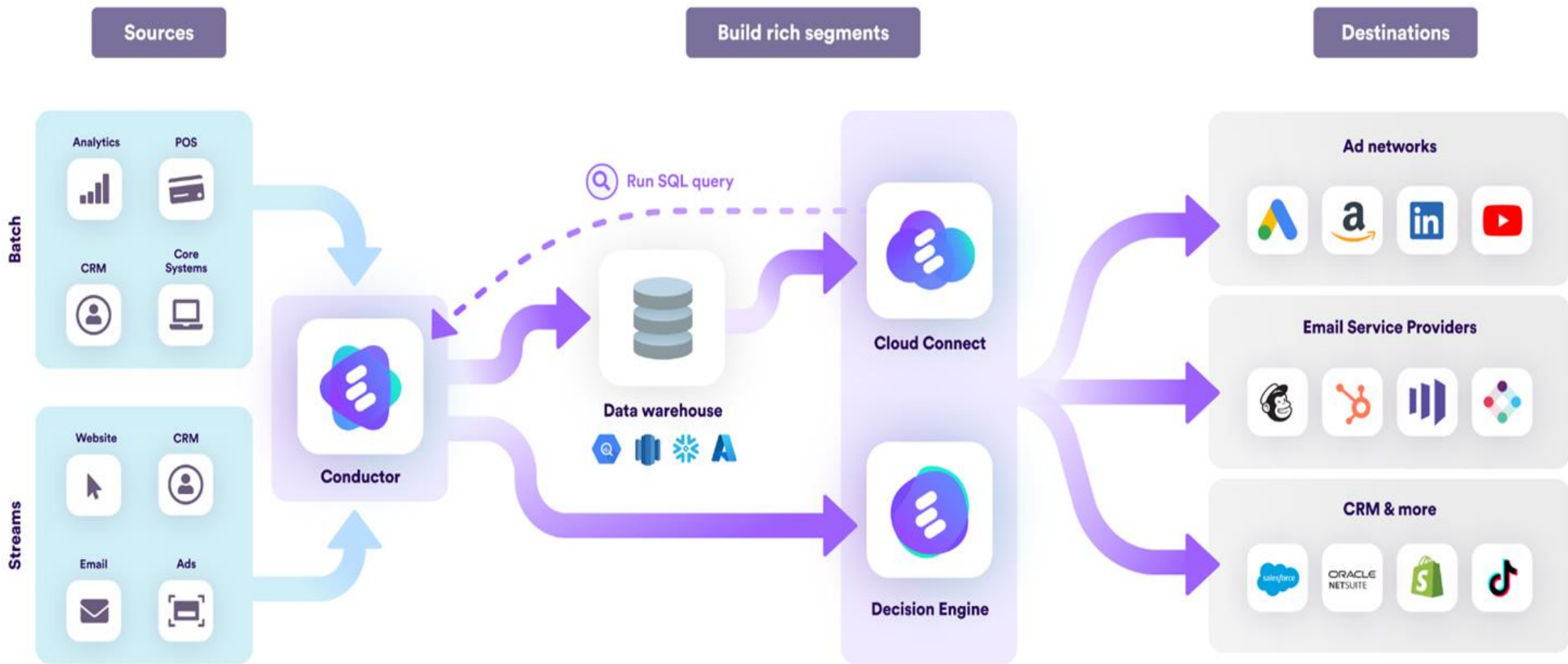
Who might benefit from a CDP?

Indicator	Your answer
A lot of my revenue is derived from digital mass giving (and we generate £1m+ from this today)	
We engage our supporters across multiple (3+) digital channels (and they are increasingly digitally active with us)	If YES a CDP may be of value
We have 1000s of web site visitors each month but we have no idea what they do (and we struggle to attribute the donations we do get)	
We have the internal capabilities to absorb more data and use to create a larger volume of more targeted, more personalised mass giving campaigns.	

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CRM/CDP Hype cycle for non-profits

EXPECTATIONS

TIME

Sector Strategic Focus

Behavior driven fundraising (CDP)

Personification

Personalisation

Relationship based Fundraising (CRM)

Conversational Websites

Digital Advertising

GDPR Compliance

Supporter Experience

Data/Identity Management

Innovation Trigger

Peak to Inflated Expectations

Trough of Disillusionment

Slope of Enlightenment

Plateau of Productivity

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Roundtable discussion

- **Highly optional topics!**
  - What does your supporter 360 data look like today?
  - Would your organisation benefit from a more capable model?
  - If you wanted to draw a hype cycle what would it look like?

Event feedback

Thanks & Goodbye!

Upcoming events...
CRM and Customer Data – 10 October (Zoom)
www.adaptaconsulting.co.uk/upcoming-events

help@adaptaconsulting.co.uk

www.adaptaconsulting.co.uk

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