



# CRM and (virtual) cake X

4 February 2021

 @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 to the event, introductions and overview of the agenda for the afternoon  
Iain Pritchard, Adapta
- 14:05      **CRM Q&A**  
A quick glance at the state of the market and a first pass at the questions delegates have asked in advanced.
- 14:25      **Case Studies and questions**  
Graham Mulholland, Royal College of Ophthalmologists  
Steve Holloway, Chichester Cathedral
- Grab a coffee (and a slice of cake if you have it)*
- 15:15      **Virtual roundtable discussion & feedback**  
All
- 15:55      **Review & close**  
Iain Pritchard, Adapta

# Practicalities

- ‘Share screen’ should only be used for speaker presentations.
- Please **remain in mute mode** unless you wish to participate in the Breakout Room discussions.
- Your profile name should be your name and organisation – Hover over your name in Participants and select Rename.
- **If you have a question relating to any of the presentations or plenary discussions**, please feel free to submit these at any time using the Chat feature. Questions will be picked up once each presentation has ended.
- If we do not have time to cover questions/all questions, we hope to open a private discussion space following this event.
- We’ll be sharing the presenters’ slides after the event.
- **If you have a technical question** please use the Chat facility, and select **Paul Stirrat**, who will be able to help.

# Breakout sessions will discuss:

**ROI: How do you measure the success and benefits of a CRM system?**

**Risks: What do you worry about most when you think about a CRM implementation?**

Each group will have a member of the Adapta team who will facilitate the discussion and capture headline notes. Everyone will be returned to the main room for wrapping up.

***During breakout sessions:*** To contribute you should raise your hand using the 'Raise Hands' feature. Unmute once you have been prompted to by the Facilitator.

***How to raise your hand:*** Click on the icon labelled 'Participants'.

Click on your name and select "Raise Hand".

You may have to click the screen to access the menu.

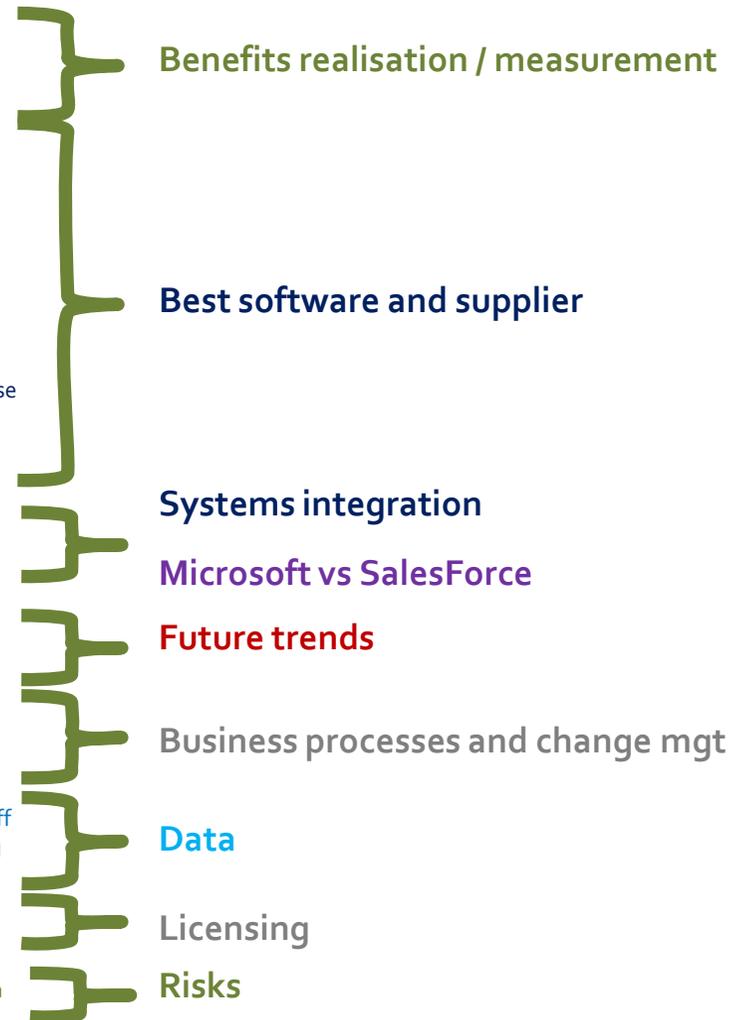
# CRM Q&A

# Questions...

- From other implementations, I would like to know the best way to measure the benefits of a CRM.
- How do organisations measure ROI on CRM systems?
- Case studies of benefits realised from a new CRM implementation.
- What current platform/supplier offers the most flexible and cost-effective CRM solution for membership organisations.
- Are platform CRMs suitable for small to medium sized charities.
- Which are the current MS Dynamics implementation partners that others would recommend?
- What's the most appropriate CRM on the market for my charity right now?
- An overview of other systems out there that could assist us in our need for much better integration between systems
- Where other people are in the journey migrating away from care and other legacy systems and their lessons learned.
- Use and current market status of Raiser's Edge compared to other available options (plus a sense of how other RE 7 users are approaching this challenge).
- Where the current state of CRM commissioning is. I last put one in 3 years ago.
- How do we maximise flexibility of a CRM and make it open to other systems?
- Would Salesforce or Dynamics be better for us?
- How much configuration will MS Dynamics need to work in a charity environment?
- Why are most medium to large organisations going to Microsoft Dynamics in the last couple of years? Is there a 'killer' feature that moves it above Salesforce?
- What are future trends in CRM and how can we achieve a measure of future-proofing today, to avoid the major disruption of a manual migration to a new system?
- What is the future lifespan for off the peg CRM databases like ThankQCRM?
- How can we make improvements to get a more comprehensive and integrated view of our supporters?
- How people have successfully implemented CRM and encouraged user uptake. Tips on what to consider when deciding what to use.
- How do people best deal with cleaning up their data? I'm not talking about 'data cleansing' stuff here (deceaseds & gone aways etc), but how best to deal with data integrity checks, identifying which records to remove (as they are not 'adding value'), not creating duplicates when you import, etc etc.
- Is there any user software that will help me practically manage the licences that I hold?
- What things should we take into consideration when choosing a CRM?
- Replacing a CRM is always a risk what are the things that we must do on the journey to ensure a successful outcome.

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Best software and supplier

Microsoft vs Salesforce

Future trends

Business processes and change mgmt

Data

Licensing

# Best software and supplier

Don't be distracted by:

- Shiny software
- Shiny sales teams
- What has worked for other organisations
- How big or small you think you are
- How easy it is to use a smartphone

Think seriously about:

- Whether you really need a new CRM
- What other projects CRM might force you to run
- Whether you have the skills and experience to buy and install one
- What it really might cost and how long it is likely to take

**The percentage of successful CRM projects is still running at below 35% \***

# Microsoft

vs

# Salesforce

Partner scale & choices

Membership and Grant-making

Cost

Marketing

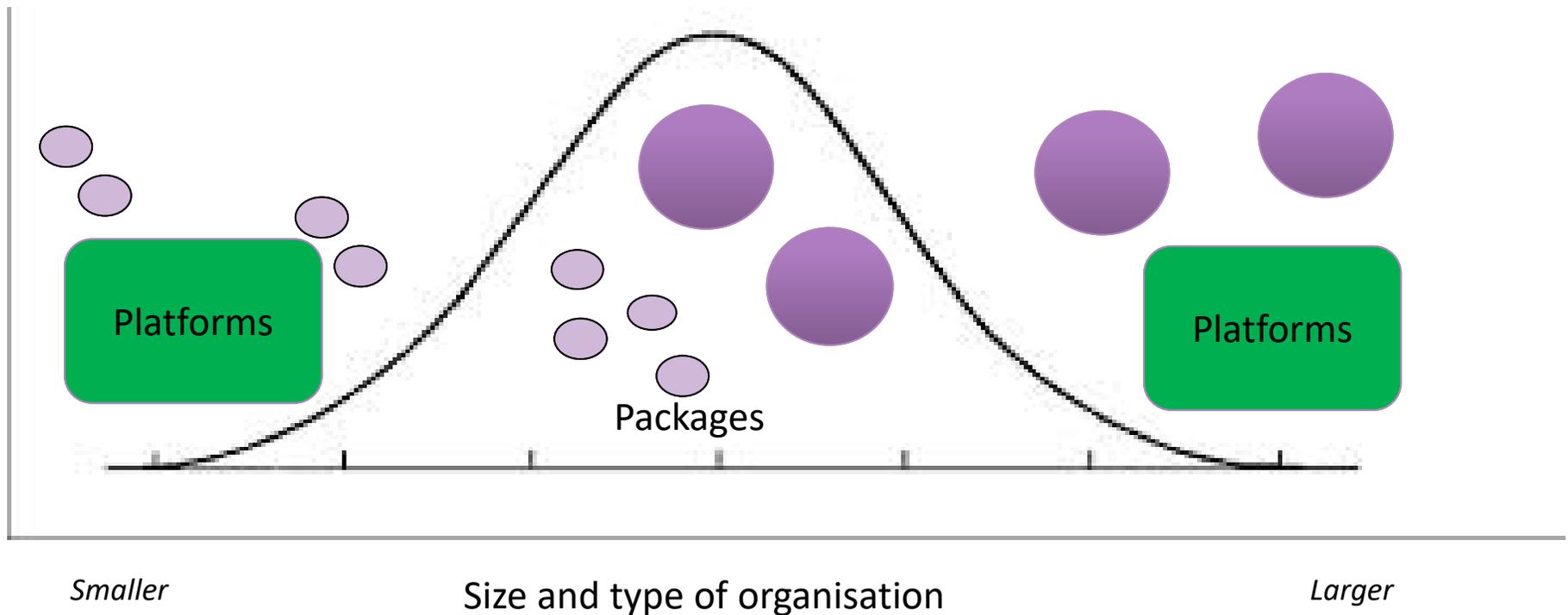
User experience

International support

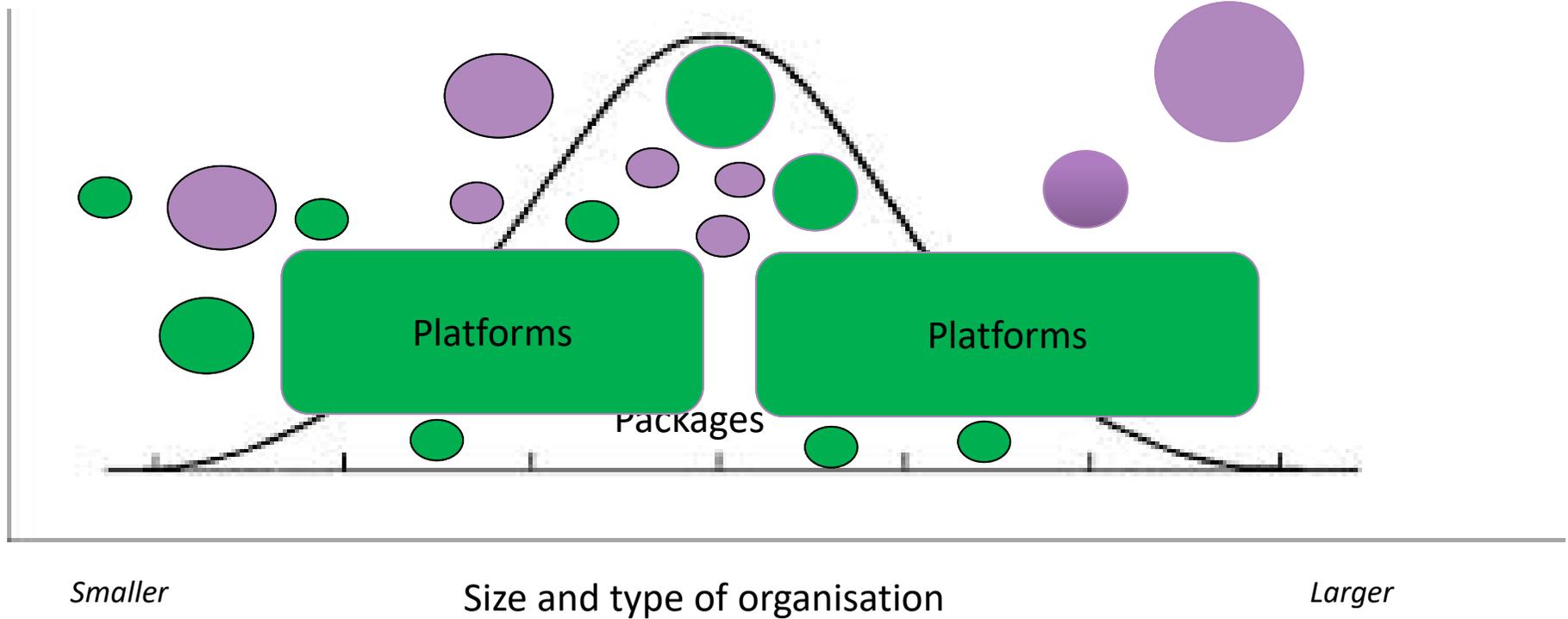


# Future trends

# Package or platform (...in 2012)



# Future trends



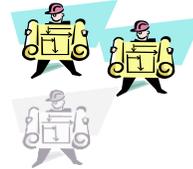
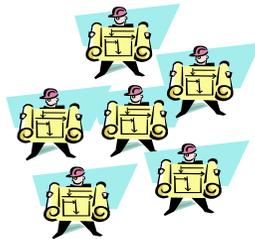
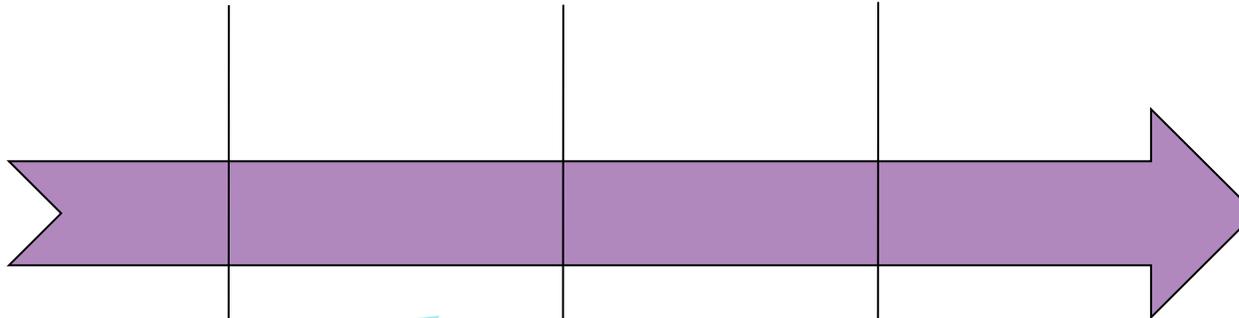
# Business process and change

Scope,  
resources and  
governance

Business case  
and key  
processes

Short list and  
Prototyping

Specification and  
contract for  
discovery with  
preferred supplier



Do we really  
need this?  
Can we do it?  
Can we afford  
it?

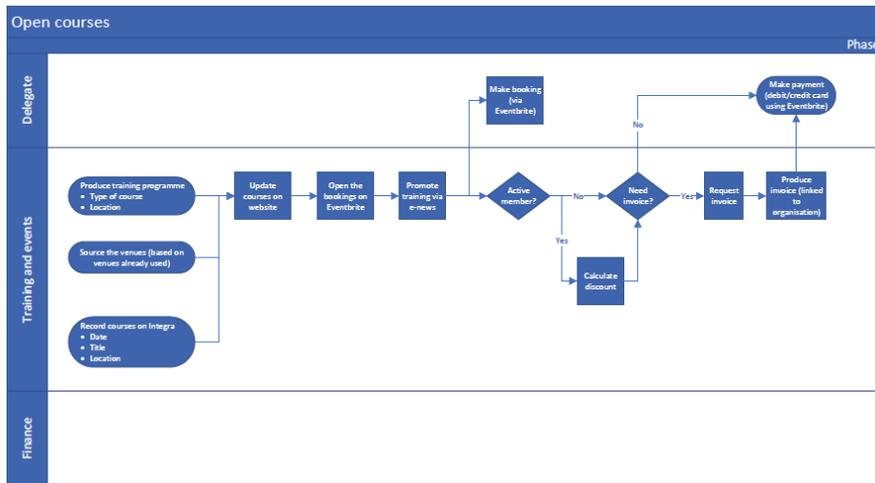
How would  
these  
solutions and  
suppliers help  
us?

What would  
it feel like to  
work with  
these  
suppliers?

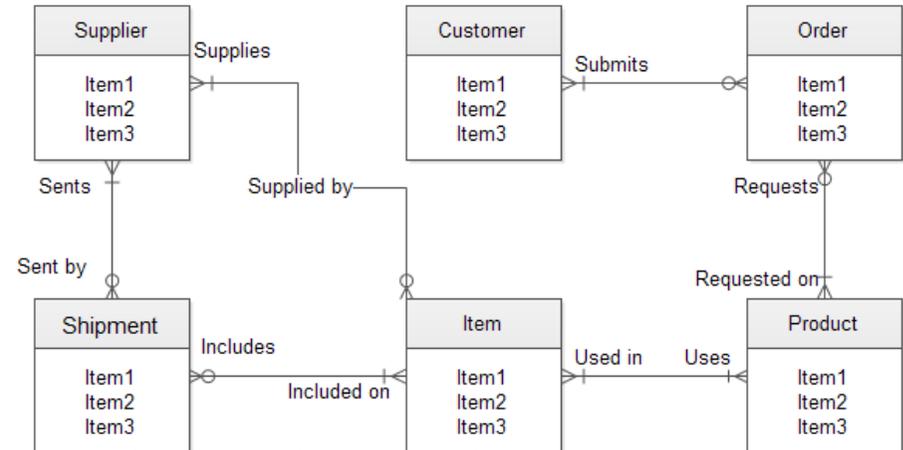
What will it  
really take to  
get what we  
need?

# Data

Do some of these:



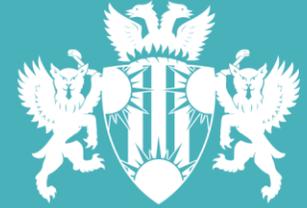
But also do one of these:



[This Photo](#) by Unknown Author is licensed under [CC BY-SA](#)

# More questions





*The* ROYAL COLLEGE *of*  
OPHTHALMOLOGISTS

# The RCOphth

Eye doctors setting standards to help patients



The ROYAL COLLEGE of  
OPHTHALMOLOGISTS

~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



## We believe ....

... that everyone should have access to high quality eye care

## Our mission ....

... is to ensure the highest achievable quality of eye care for patients through excellence in training, education and assessment of ophthalmologists; to uphold standards and promote research and innovation

# The role of the College



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

# Why are we here?

- ...
- *Specification*
- Momentous Decision
- Planning
- Selection
- Specification (again)
- Implementation
- *Project Closure*
- *Benefits Realisation*

## **Objective 1**

**CRM – oversee the upgrade of the CRM in conjunction with the Membership co-ordinator. Put measures in place to reduce the risk of an unsuccessful upgrade.**

**Upgrade due to be complete by end February 2019.**

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

# Momentous Decision

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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.”**

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**Establishment of project board. Initial Draft of Requirements**

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**August 2019 References, Contract Signing**

# Re-Specification

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May 2020 – End of Website Hosting Contract

## **October 2020 – Go LIVE!**

# Benefits (Realisation ongoing)

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

# Useful Tools, etc.

**MemberWise** – online community for association and membership sector

<https://connect.memberwise.org.uk/home>

**Testpad** – Build and manage test plans

<https://ontestpad.com/>

**This Person Does Not Exist** – Pictures for your test users

<https://thispersondoesnotexist.com/>



**Brain.fm** – Music to aid productivity, creativity and relaxation

<https://brain.fm>

graham.mulholland@rcophth.ac.uk





- Why we needed to change our contact data management
- How we selected the new data solution
- How did implementation go

Steve Holloway, Chichester Cathedral Database Implementation Project Manager  
Adapta CRM & Cake 4<sup>th</sup> February 2021



## The need to change

- The Cathedral's diverse contacts
- Many different data collections
- 3 separate charities

Recognition of inefficiency, potential reputational harm and exposure to GDPR compliance issues



## Solution Selection

- Internal Agreement
- Determining Requirements
- Selection Criteria
- Evaluation of Proposals

Adapta provided outstanding support and professional advice throughout this process

# CHICHESTER CATHEDRAL



An ambition to end up with a CRM Solution that we could afford that:

- had 1 record per contact
- could handle the particular needs of Marketing, Communication, Fundraising, Membership, Event management and Volunteer activity
- could handle 3 different sets of HMRC credentials
- could be implemented with existing resources
- provided a migration path from our existing databases
- provided infrastructure to implement GDPR
- was run in the cloud and delivered on the internet
- could interface with the Cathedral website
- had a good track record of existing users
- had a long term development future



## Implementation

- The Value of a good Implementation Process
- Role of Local Project Management
- Training and Testing
- Technical Support

Access Consultants used a tried and tested process and excellent user and technical support

# Breakout Room Discussions



**ROI: How do you measure the success and benefits of a CRM system?**

**Risks: What do you worry about most when you think about a CRM implementation?**

**Re-convene for feedback from each group.**

# Poll, Thanks & Goodbye!

## *Upcoming events...*

### ***Information security and cake – 30 March 2021***

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

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