

Choosing the future

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Who are Christian Aid?

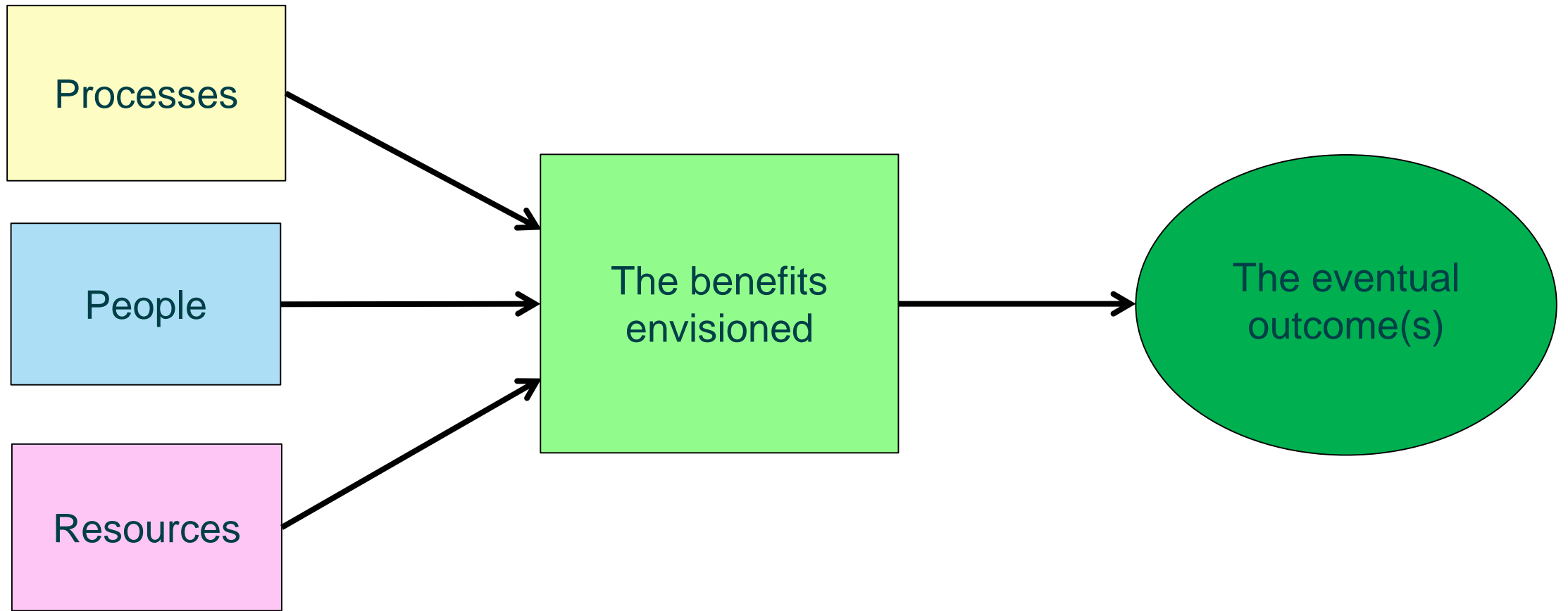
- ➡ An international development agency working in 37 countries
- ➡ Set up by the churches of Britain and Ireland and are still serving them over 70 years later
- ➡ Supporting communities to fight the injustice of poverty, with people of all faiths and none
- ➡ Our work in Britain and Ireland is focussed on fundraising and campaigning

Who are Adapta?

- ➡ 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

Mapping out a future

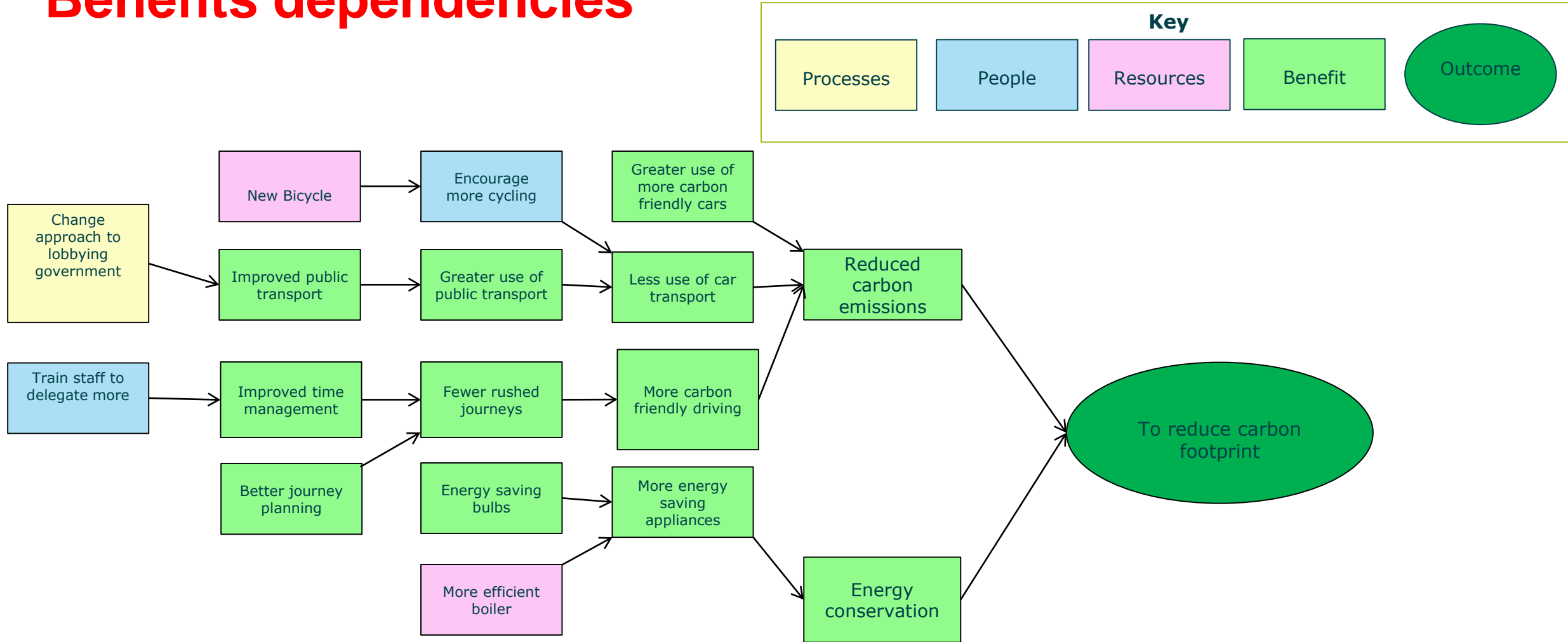
- ➡ Worked with Adapta Consulting to help us to determine what our vision was for the future
- ➡ Existing CRM, Ascent, reaching end of its life
- ➡ Drew on stakeholders throughout our supporter-facing teams to workshop their vision for the future
- ➡ Used Benefits Mapping
- ➡ Clear idea of hopes, and a foundation to build requirements from



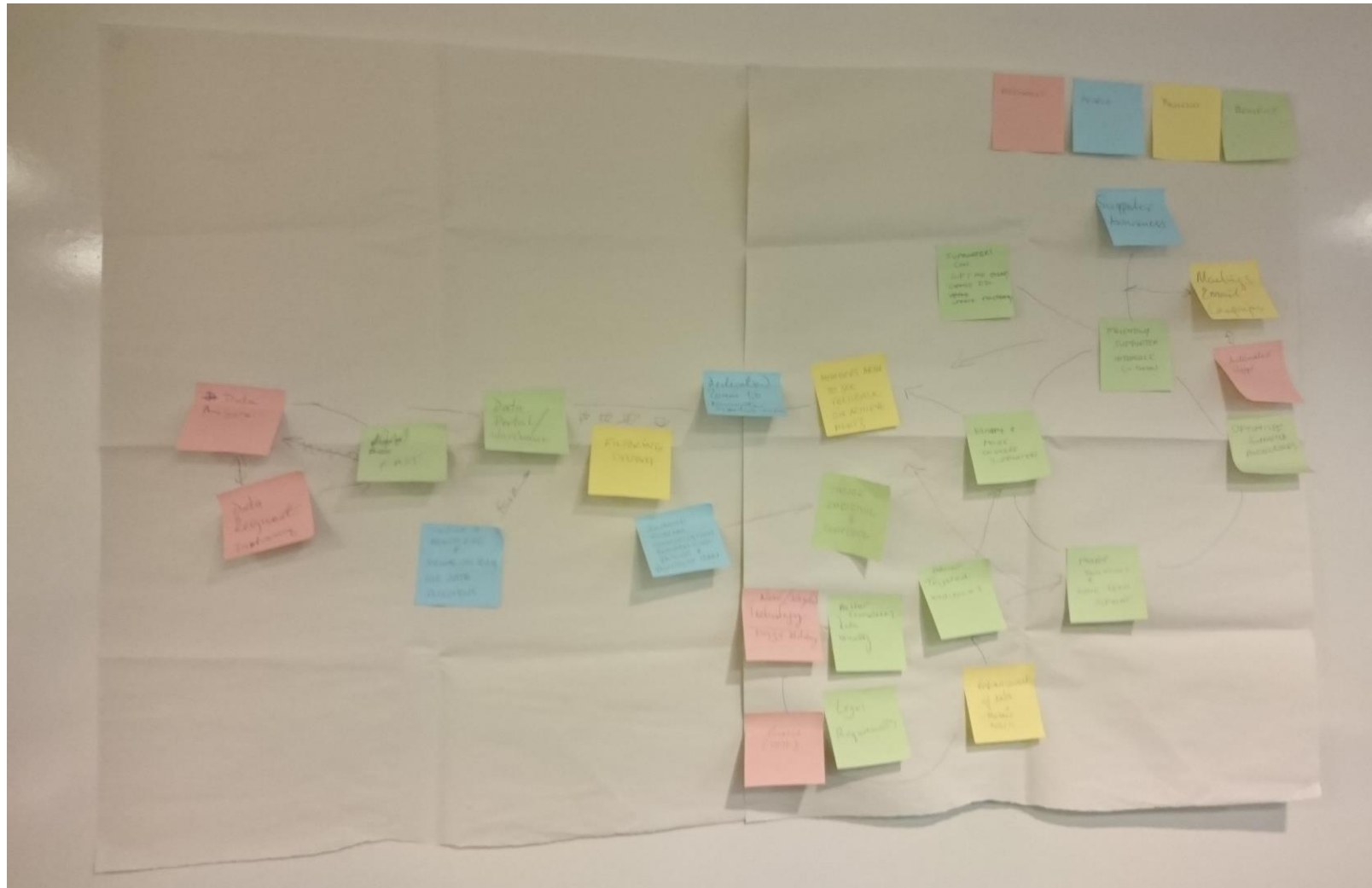
Basic Concept of a Benefits Map

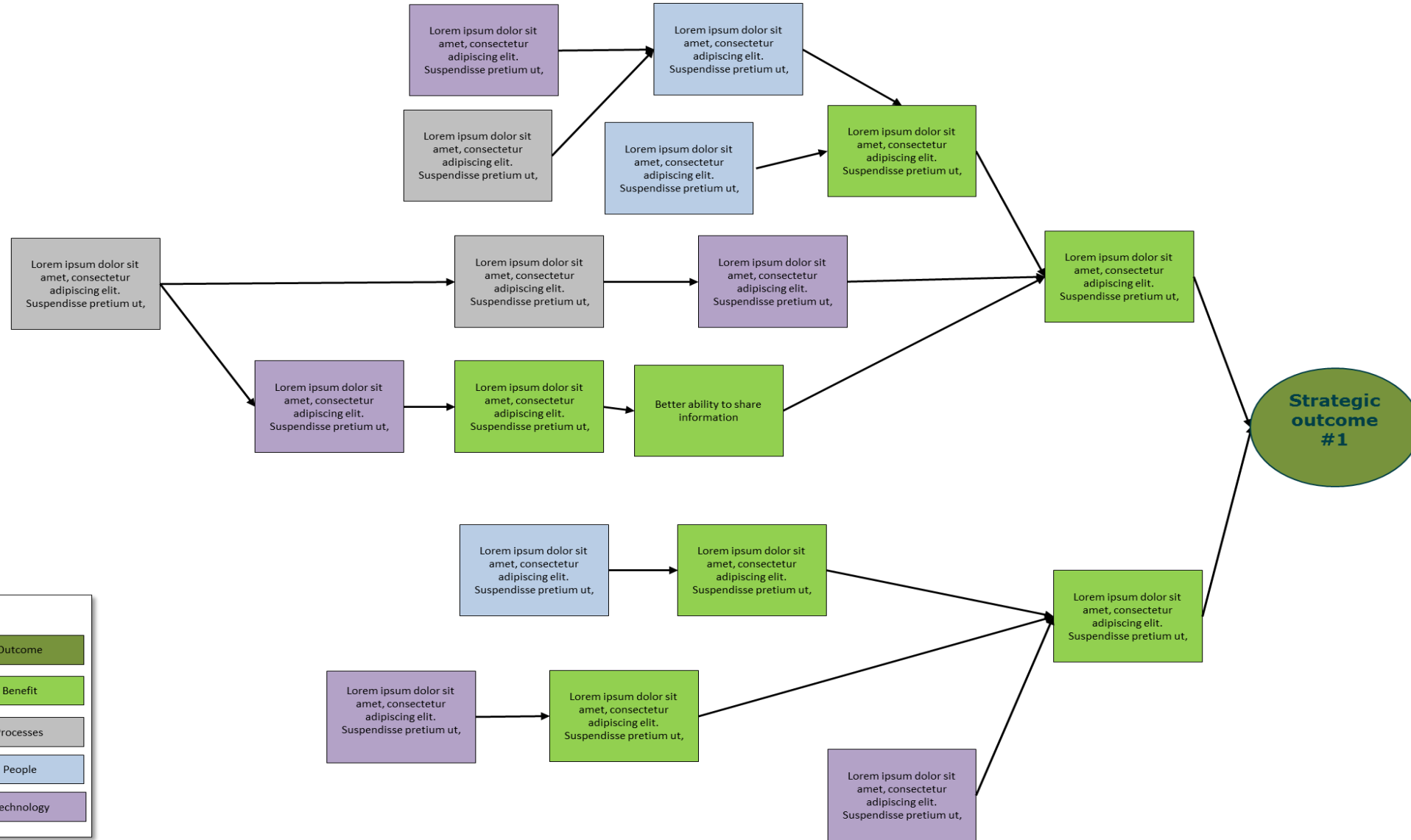
Starting at the desired end result, you look at what needs to happen to reach that goal: some of those actions will be a benefit in themselves, some will be people, resource or process changes

Benefits dependencies

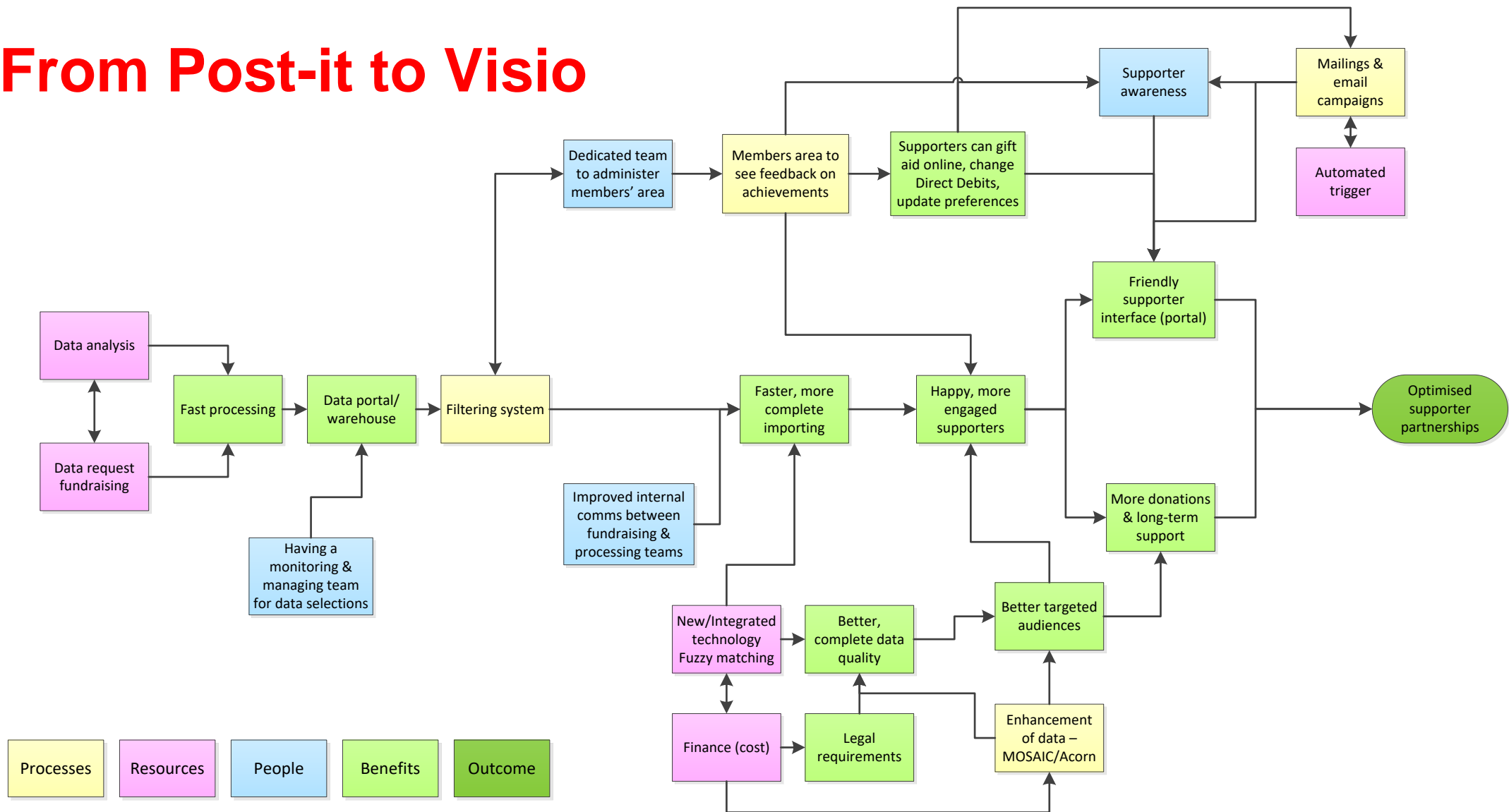


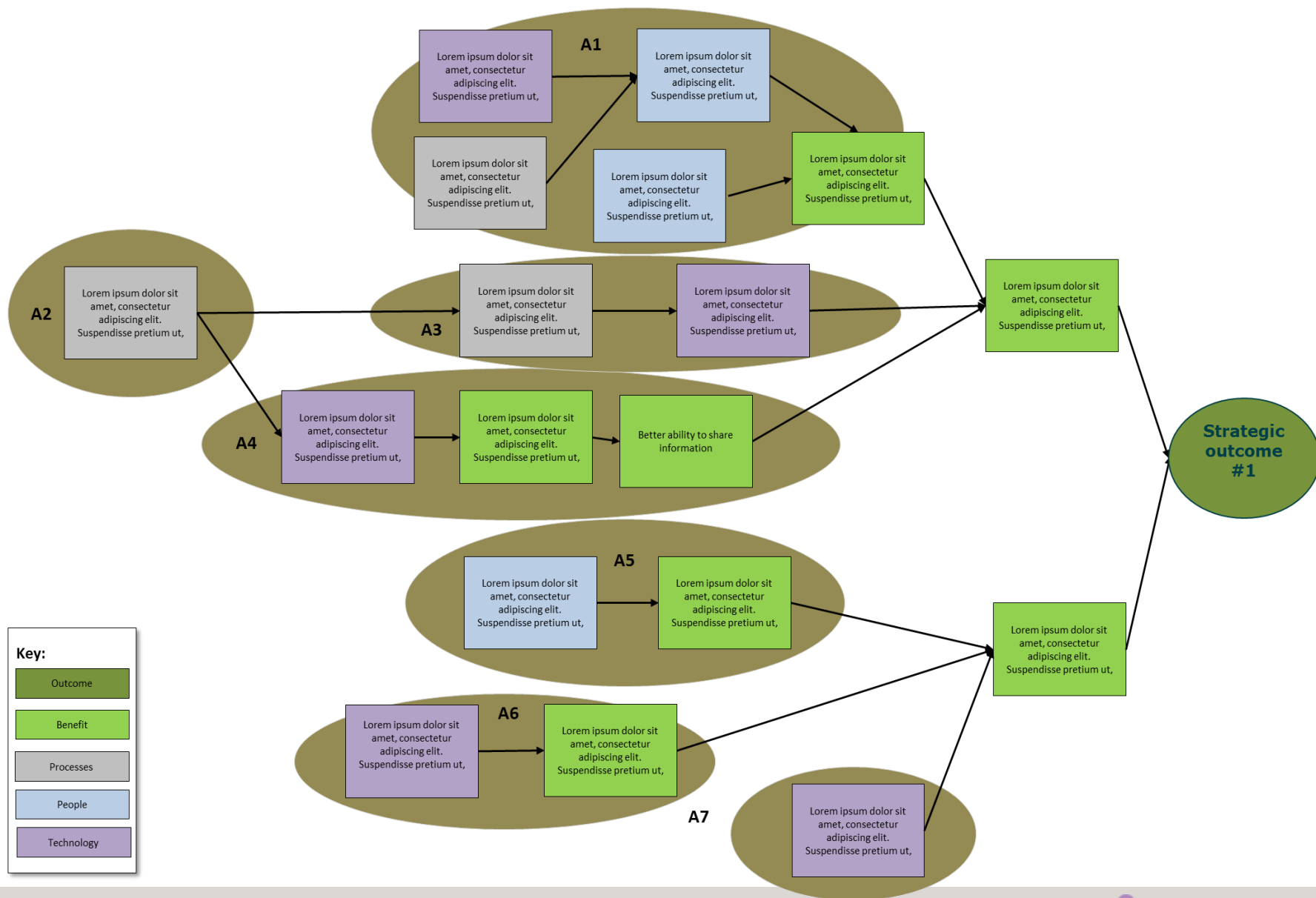
Post-it heaven



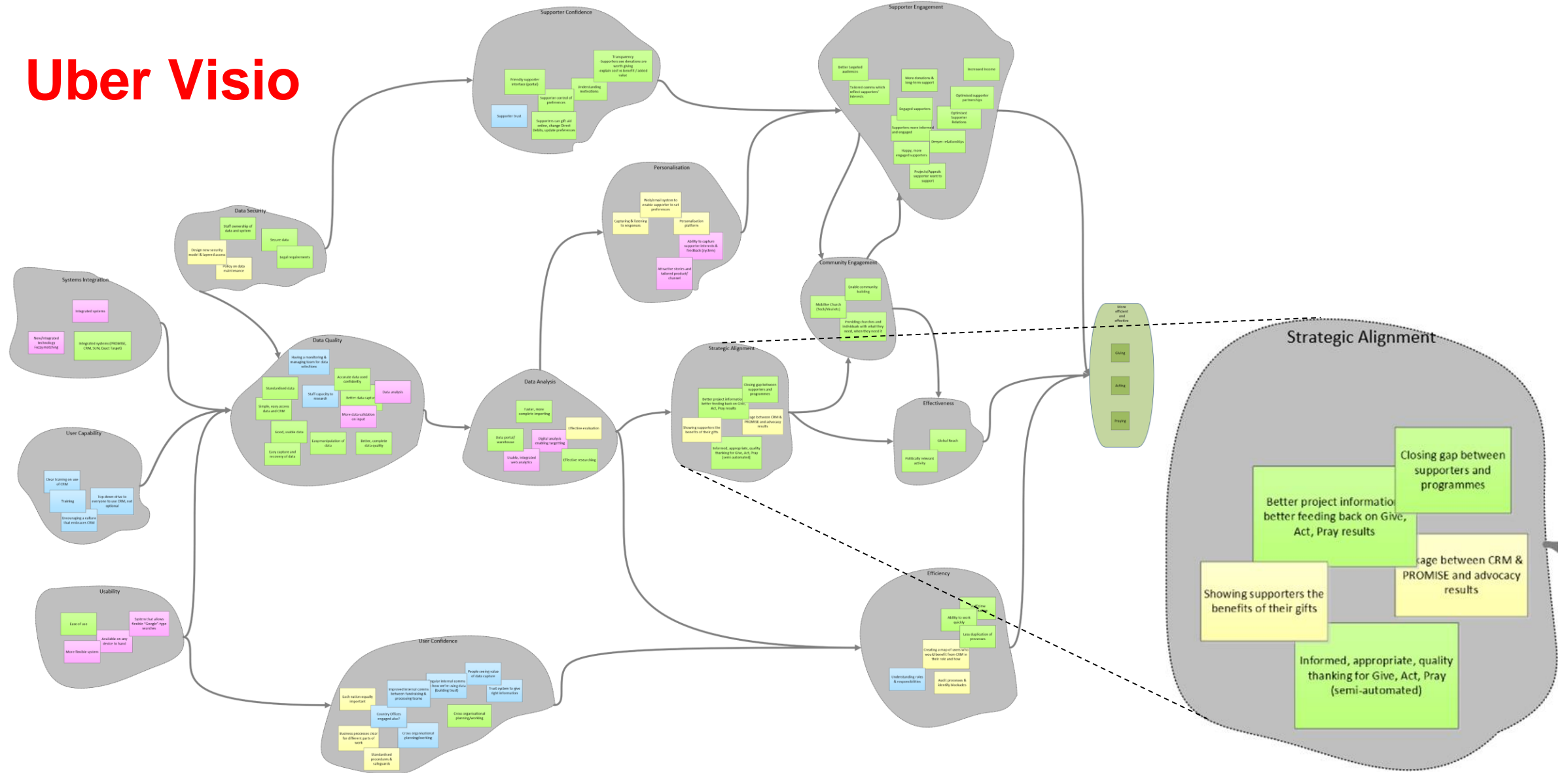


From Post-it to Visio





Uber Visio



	Project complexity	Project ownership	SI staff effort (days per month)	Dept. staff effort (days per month)	External cost (£000s)	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12	W13	W14	W15
A. Strategic objective #1																				
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Desired benefits

- ➡ A CRM which gave us a 360° view of our supporters
- ➡ A tailored supporter journey; recognising their interests and engagements with Christian Aid through Give Act Pray
- ➡ A more user-friendly, intuitive system
- ➡ An integrated digital marketing platform
- ➡ A system that allowed supporter self-service
- ➡ A solution that fitted and grows with the evolving digital landscape
- ➡ A GDPR-ready solution

Our key questions from Benefits Mapping

- ➡ Can our current system, Ascent, live up to the way we want to work now and in the future?
- ➡ What are the CRM software packages available on the market for the not-for-profit sector?
- ➡ Which of those systems are the best fit for the way we would like to work?

Selection Process

➡ We took our time to ensure we made the right choice

➡ 6 month process

- Longlisting suppliers
- Invitation to tender
- Shortlist to 4
- Supplier presentations
- Shortlist to 2
- Prototyping, due diligence and reference site visits

Why Dynamics?

- ➡ Little difference in capability between Salesforce and Dynamics
- ➡ A “Microsoft first” policy
- ➡ Integration with existing software
- ➡ Familiar look and feel for users
- ➡ Clarity on pricing
- ➡ A supplier which suited Christian Aid

▶▶ Fast forward a year

- ▶ Christian Aid went live with phase one on 1 May
- ▶ It hasn't been easy
- ▶ It hasn't always gone to plan
- ▶ We have learnt a huge amount
- ▶ However, we know we made the right choice for Christian Aid
- ▶ Our staff and supplier's technical team work together as one

Learning Points

- ➡ You need a good project manager
- ➡ It helps to have the project manager involved in the selection process
- ➡ Be clear about what matters to you and your organisation
- ➡ Expect it to take a long time and for things to go wrong
- ➡ Data migration takes a massive amount of time and energy
- ➡ Don't be afraid to ask for external help – you are not expected to know how to do this from scratch!
- ➡ Find a supplier who will work alongside you as a partner, and will be there with you when things go wrong

Any questions?

If you would like to chat further about Christian Aid's CRM journey, please feel free to contact us:

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