

Evaluating Your Needs

Life is a series of making decisions. Some decisions are easy because they do not require a substantial investment of time or money. More importantly, easy decisions do not require one to do homework in order to make sure the decision is the correct one. Deciding which flavor ice cream to buy fits into this category: You really don't have to spend any time or do any homework around which flavor to pick. If you get vanilla today you can always get chocolate tomorrow.

Other decisions are much more difficult not only because they may require substantial investments of money and time, but because you may have to live with your choice for the foreseeable future. Decisions like these often require a lot of pre-planning and evaluation because once they are made, they are not easily undone and may continue to effect your life adversely on a daily basis. Buying a house fits into this category and, on some level, so does adopting a new **CRM** system.

Planning phase and project plan

Regardless of whether yours is a large or small organisation or a one person "shop", and regardless of whether your requirements are complex or very simple, it is still important for you to do some level of planning and thinking about your goals. Obviously, the more complex your needs, the more time you will need to spend in the planning phase of your project but statements like "I want a database to put my constituents into" or "I want to send a newsletter" often indicate that too little forward thinking has been done with regard to current organisational goals or how a new CRM system might be used to enhance constituent outreach. This is often a huge mistake; constituents are the life blood of any organisation and a CRM system is the most important tool available to help sustain that life and keep the blood pumping.

In the planning phase, it is very important not only to *think* about your needs and goals but to *document* your thoughts by creating a *project plan* that may then be used as a reference to help you implement the decisions that you made. A well organised project plan will list, in a logical order, the various tasks that need to be completed and it will help you to develop a realistic time line for implementation.

Whether simple or more complicated, a project plan can be invaluable as a resource for a successful implementation. It will be a work in progress that will be revised many times, so best to create it electronically if possible.

Not all of the topics in this chapter might pertain to you. If your organisation is small or your requirements are very basic, the planning phase will not be as involved for you. A more complex and involved planning process, such as the one documented below, may be applied as a whole to larger organisations or organisations, regardless of size, with more complex needs. However, even if you see your CiviCRM deployment as small, it's still worthwhile to go through all the planning aspects described below and check if some of them apply to your situation.

In general, but particularly for medium and large scale organisations, the relative success or failure of your CiviCRM implementation will be directly influenced by the amount of time that you spend, prior to installation, thinking about how to use your CRM system to embrace and enhance the relationship between your organisation and its constituents: the more time you spend on the "big picture", the more successful your CRM system will be in the long run.

Preparing Your Project Team

Unless you are a one-person shop, a critical part of your project will be picking the right people for your project team before the project begins. In fact, this should happen well before you finalize what your technology and database needs are. Once you establish *who* will be involved you then need to figure out *what* each person will be responsible for and what they will contribute towards the success of the project.

Whom to Consider

The team should include people from all aspects of your organization. If you are a large organization, this may mean staff from different departments or roles within the organization such as event coordinators, communications and marketing staff or fundraisers. If you are a small organization, one person invariably will have multiple roles so it's OK if they represent those roles within the team. The key here is that the team should represent the organization so that as the project progresses all interests and needs across the organization are taken into account.

There is an understandable tendency to bring in "accidental techies" (someone with no core expertise in this area but who has somehow inherited the job of implementing the CRM system that is chosen) onto your team. It may seem counter-intuitive, but accidental techies sometimes are the wrong people to be involved in a technology project. This is because they may be too knowledgeable about some technical aspects of the project and will focus their time on how things should be done instead of what should be done. This is often unavoidable in smaller organizations but it is something to try and be careful of.

When putting together your team, keep in mind that it might be a major time commitment - and a long term one. Throughout the project, the team should be meeting on a consistent basis (weekly or bi-weekly for large and complex projects). If a team member is not able to make that type of time commitment for the length of the project, then they should not be involved.

Avoid bringing new people in half-way through the project. The team should stay together for the length of the project. Bringing new people in half-way through the project can require a major effort to bring them up to speed.

Before you decide on how decisions will be made throughout the project you need to assign a team representative or point person. This person will represent the team to the person or people implementing the CRM system that you choose. Again, for smaller organizations, the team point person and builder may be one and the same! The important thing to remember here is that your point person must have a deep knowledge of how your organization works and what your needs are so s/he can articulate those things to the person(s) implementing your CRM system. This person should be heavily involved in the development of the project plan. S/he can then use that plan as a means of evaluating CRM systems.

Ongoing support

It's never too early to start thinking about maintenance and support. After the software is successfully deployed, somebody will have to install new versions, provide help and training to new employees who will be using the system and be able to react to any potential problems. It's usually good practice to have this person involved in the process from the very beginning.

General guidelines for planning

A couple of precepts will help you keep your decision-making process on track. Each member of the team should not only understand these precepts intellectually, but try to bring them into the heart of the discussions.

The importance of creating a constituent-centric organization

Your constituents, and the relationship that you have with them, are the most important assets in your organisation. If you believe this, then you realise how important it is to consciously and conscientiously ensure that your organisational processes and goals revolve around satisfying them. My guess is that the reason you are reading this book is because you are searching for new ways to improve and enhance the relationship between your organisation and its constituents.

A well designed CRM system will make it easier for you to communicate more effectively with your constituents and to provide prompt and professional "personal" attention when necessary. There are many things you need to think through prior to installation and actually sitting down to use your CRM system. The steps below will direct your or your team's attention towards some of these things and will help you to formulate a solid plan on how best to create a constituent-centric organisation that uses its CRM system in an effective way.

As you read through the topics below, keep the relationship with your constituents at the center of your focus and think about what your organisation needs from a CRM system to enable it to communicate more effectively.

Look at organisational processes first and follow with technology

For now, forget about technology! That's right, forget about technology and forget about CiviCRM. The reason I say that is because there are likely several CRM systems that would meet your needs, but if you aren't clear or aware of what those needs are, even the best CRM system will fall short of satisfying you: you will blame this on the system, but the fault lies with you for not having done your homework before class :) So forget technology for now and focus on thinking about the organisational processes that you employ to communicate with your constituents. Work to re-mold these processes so that they reflect the goals of your organisation.

Decision Making Process

Now that the team is assembled with a representative, the decision making process should be finalized. In the non-profit sector there is a strong ethic and value placed on making decisions by consensus. In general, this is not a bad thing but when applied to technology projects, it can sometimes significantly slow a project down if every decision must be agreed upon by the entire team before moving forward. It is recommended that you instead maximize collaboration and discussion throughout the project and decide on how to handle decisions when things come to a disagreement. In many cases a simple vote can work. In extreme cases, it may involve bringing the issue to leadership within your organisation and having them make the final decision.

Take advantage of institutional knowledge

Talk to your co-workers, particularly those who have been around the longest, and use their "institutional memory" to record the kinds of interactions they have had with constituents. Cast a wide net here: make sure to talk to people who handle each key point of contact with your constituents, and learn about the experiences with all kinds of constituents. Use this information as a guide to define processes that will build organisational value.

Define the desired set of constituent experiences

How does your organisation want to relate its constituents? This will vary on a case by case basis, but here are some suggestions for the sorts of things you might think about:

- Giving constituents the ability to select which mailings they want, how often they want to receive them and, the ability to unsubscribe/opt-out of your mailings
- Honoring constituent requests. Some examples:
 - ◆ if a constituent indicates that they do not wish to receive an acknowledgement, don't send one!
 - ◆ if a constituent sends an address change, make sure you update your records
 - ◆ if a constituent indicates that they only want to receive one solicitation, don't bombard them with requests

- Prompt acknowledgement of contributions and/or correspondence
- No duplicate mailings
- Maintaining accurate information about constituents (name, address, interests etc)
- Event registration

After you have determined how you want your organisation to relate to its constituents, examine your organisational processes and change or eliminate those that are not conducive to providing your constituents with the type of experience that you want them to have. The next section will help you think through that process.

Examine organisational goals and practices

Think carefully about your current organisational processes and how they may be falling short or impeding your ability to communicate effectively with your constituents, and create a plan for what you need to do to remedy that.

Here are some areas you might think about:

- What are the goals of your organisation?
- What are the core processes in your organisation?
 - ◆ What happens in your organisation when you receive someones contact data?
 - ◆ How does your organisation handle mailings to households and individuals in those households?
 - ◆ How do you respond to snail/email correspondence from your constituents?
 - ◆ How do you communicate the financial standing of your organisation?
 - ◆ How easy is it to get data out of your current system(s)?
- Do you have a way of knowing when a constituent is losing interest in your organisation and why?
- Is it straightforward and easy for your constituents to report issues that they have with your organisation?
- How easy is it for your constituents to learn about and sign up for upcoming events, meetings, campaigns etc

What functions must your new CRM system address?

With a good idea of what you want to offer your constituents, and your staff, ask how CiviCRM's features can help your organization. Some common needs follow.

- ◆ Fund raising, online and offline (such as through email)?
- ◆ Communications?
 - ◇ Snail mail?
 - ◇ Email blasts?
 - ◇ Newsletters?
- ◆ Memberships?
- ◆ Managing specific relationship types?
- ◆ Events management?
- ◆ On-line registration?
- ◆ Specific reporting needs?
- ◆ Sorting and grouping
- ◆ Sharing data with other systems?
- ◆ Volunteer tracking?

Technical and logistical planning

Technology, money, time, and expertise in your organisation all play a role in getting CiviCRM up and running.

Establish a budget for your project

It may be that you or someone in your organisation can handle the entire implementation. If that is the case, your costs will be more in the area of time rather than money. If that is not the case, you should probably figure out how much money you have to spend on this project.

Possible costs are :

- Purchasing a server to host your CRM system
- Hiring a consultant to help you with some or all of the planning and implementation
- External Hosting: you pay a monthly hosting fee to a vendor and, depending on what services you request, they maintain the server and backup your data (for example)
- On-going paid support for issues that may arise after implementation
- Customisations to the software (if the out-of-the-box product does not meet your needs)

Identify repositories of data

Because you can't do much with CiviCRM until you get your existing data into it, plan how you'll do this well before you set up CiviCRM for production use.

- Identify all existing sources of data that you plan on importing into the new system
- If the data is currently stored in "proprietary" software, are you able to export it?
- What kind of shape is the data in? Does it need substantial cleanup and deduping? If so, who will do this work?

Identify the hardware/browser that will be used by office staff

Some CRM systems might not be compatible with the type of hardware (PC, MAC etc) and Internet browser (Internet Explorer, Firefox etc) that your staff are using. To avoid choosing a system that will not work properly, take an inventory of computers and make a list of the browser software being used.

Identify the information that you wish to collect and track

Your decision-making process describes in general your organisation's information needs, but now you want to determine exactly what fields you'll need in CiviCRM.

- Make a list of each field that you are currently tracking
- Add to the above list, any new information that you wish to track
- Anything else?
 - ◆ Interests
 - ◆ Groups
 - ◆ Donations
 - ◆ Volunteers

Identify the staff who will use the system

You may need to free some of your staff from existing duties to handle CiviCRM, although the system should save you time and effort after it's deployed. You may also need to hire a staff person with technical skills, or bring in a consultant.

- Make a list of staff who will be using the system
- For each staff person, figure out what kind of data they need to access and decide what kind of access they will need. For example: A volunteer will probably need to be able to see ("read" access) and update ("write" access) constituent name and address data but you might not want them to have any access to contribution data)
- One way to approach this is to create a variety of "roles". Each role is associated with certain permissions. After you have established the roles and respective permissions, assign individual users to specific roles. Examples of roles are: volunteer, fundraiser, administrator, event coordinator, membership coordinator and data entry.
- Identify the administrative "owner" of the system: a point person who will be responsible for handling the technical aspects of managing and maintaining this system. Determine the technical skill level of this person. Do they have the skills that are necessary to successfully implement the system?

Identify support needs

Some questions to ask yourself include:

- Once the system is in place, how will it be supported?
- Who will be in charge of updating and inputting data?
- Who will support it, answer questions etc
- Is there sufficient in-house technical expertise to support both the system and the people who use it?
- Is any support available from the providers of the CRM system?
 - ◆ Is there a cost for this support?
 - ◆ How easy is it to get support?

Establish a training plan

Establish a training curriculum and a timeline for training users. The curriculum should encompass all the various functionality that your organisation requires. It should provide function-specific training for those in certain "roles", and general, overview-type training for more "casual" users. While everyone would probably benefit from an initial overview of the new system, not everyone needs to sit through a two hour training session on how to manage events (for example): Only the person responsible for event management and planning would need that training.

Some examples of what you might include in your curriculum are:

- Overview of the features of the new CRM system
- Explanation of available record-types (Individuals, Households, organisations etc)
- Data entry: how to view, change, add and delete records
- How to assign your contacts to certain groups
- How to perform searches: simple and more complicated
- Import and Export
- Searching for duplicate contact data and eliminating duplicate records
- System administration
- Permissions
- Custom Data
- Relationships

- Mailings
- Contributions
- Events
- Other... your curriculum will vary depending on the features that your CRM system has and on the needs of your organisation

Training should be as close to final implementation as possible so that people can begin using the system while training lessons are still fresh in their minds.

Final thoughts on evaluating your needs

Hopefully, the information in this chapter was helpful in prompting you to think about the larger, more important picture. While the things listed here might be helpful, please realise that each organisation is unique. For some, the topics here may be overkill but, for others, there may be many things that were not mentioned. It should also be clear by now that the your larger your organisation and the more complex your needs, a successful CRM system can take a lot of planning before it is actually implemented.

For those with complex needs: If you have read and thought about the topics in this chapter and you feel confused or "intimidated", it might be time for you to consider hiring a professional to help you with this important phase of your project.