NetSquared Vancouver
Unconference Jan 31, 2015

Session: CRMs

Choosing CRMs, migration from one to another, and everything data

Communities (both in Vancouver):

- Salesforce Nonprofit Users Group
- Raiser's Edge Users Group

CRMs and other tools:

- Salesforce
- Raiser's Edge
- Dynamics (Microsoft)
- Etapestry
- Salsa Labs
- Nation Builder
- Zapier and If This Then That (syncs up different platforms, generates actions based on criteria or 'recipes')

Notes

1. Choosing/Setting up a CRM

    a. Know Thyself

    Instead of being lured by other nonprofits' shiny CRMs, ask yourself first: What do we actually need? Two sets of questions to ask yourself:

- What do we do? What are the primary activities we carry out and what kinds of data do we need to do it?
- What are our values? What are our dealbreakers? (think privacy, location of servers, consent to use people's information/contact them, etc.)

    b. Think Long Term

    Yes, choose your CRM based on your present needs, but also consider the future. Could your system support your needs if your email list exploded 1000-fold? Can you scale up?

    Consider future needs too - Would we ever want or need to use our CRM for managing volunteers (even though we don't have any now)?

    c. Don't Be Stupid

    Remember that most decisions become precedent-setting decisions. Don't frame your entire system around an idiosyncratic hunch or pet-peeve. You will regret it. (Eg: Don't

disable the ability to create individual contacts, and use only households, because you're paranoid about double mailing people).

2. Data Hygiene and Migrations

    a. Saying Goodbye to Data*

It's OK to purge. Often necessary. Don't be afraid. Most data is crap, especially the old stuff. Definitely invest the time (and possibly money) to really clean up your data before a migration. You don't want to fill your new system with useless old data that compromises its effectiveness.
*Just because you don't take data with you to a new database, doesn't mean you have to delete it. It could live somewhere else.

    b. Clients (/the public/donors) updating their own info

If you give people the power to update their own information, you also give them the power to screw it up. Tread carefully.

    c. Hygiene and Consistency

Discrepancies like BC or B.C. or misspellings (Vancuover) really matter when a query or a report depends on them. There are ways to ensure data in certain fields is only entered one way (the right way!). Consult an expert on your system (or a user group) to set up these protocols.

    d. Barriers to Migration - Customization

If you use a system with a robust API (the capability to highly customize your system to suit you, capture very particular data, etc.), and you do customize in myriad ways, it can become difficult to migrate all the specific data you gathered in those special fields into a new system.

    e. Robots will never replace humans

No matter how clean your data, and good your system, you still need human eyes looking over all your reports or lists. No robot will ever understand the intricacies of human relationships, and not all considerations can be codified in a field that you can query on or filter out. Always review and vet your lists or reports before taking action.

3. Silos vs. Integrated Systems

    a. Juggling and Toggling between Platforms

It's common for NP's to be juggling multiple platforms for different activities: one system for email, another for processing gifts, another for managing volunteers, etc. Obviously this can be time-consuming and can produce errors reconciling data between them all. At the same time, the promise of complete data/app/platform integration (i.e use

Salesforce and every other platform you use can be synced in as an app!), often doesn't live up to the hype. It's hard to actually pull this off seamlessly.

b. Export/Import is good. But not a panacea.

You can do a lot exporting data out of your system and re-importing it the way you want it. Batch imports or upserts are useful. But it won't solve all your problems. And it can also create other concerns, i.e. privacy and opening up your data to security threats.

4. Go Slow

a. Piloting

Eli's advice, as paraphrased by Natalie: Don't jump headfirst in a gigantic CRM overhaul or complete migration. Experiment slowly with a new system. Start with a small project, or small specific data set. See what problems people need solving in your office or department. Don't let it take over your life - spend a few hours a week on a pilot project. See if the CRM you're eyeing will work for you, using a sample of your data or one small area of work. If it works out, you will have begun to build a solid case for an eventual complete migration. If it doesn't work, you will have avoided making a big mistake.

b. 3 month rule

If you can't complete the IT project you're proposing in 3 months, forget it. Think in 3-year terms - where do we want to be in 3 years? But then implement in multiple, 3-month stages.

c. Tech changes are culture changes

Introducing a new tool, especially a high central one, ruffles feathers. Requires major buy-in. Demands training and orientation. May cause change fatigue. Foster the right culture in your workplace long before beginning a big IT project or CRM change. Success requires:

i. Vision Keepers - Not the lead on the project, but the people who keeps the project moving forward, maintains positivity, rallies the troops.

ii. Champions - Get champions of your project at every level, especially the top. Have them check in at the watercooler, keep people accountable in positive ways, refresh the team when fatigue sets in, etc.

Key 1-Word or 1-Phrase Takeways

- Vision Keeper - you need one
- Critical Mass / The Popular Choice (Salesforce? Does that make it the best?)
- Change Management Plan (importance of)
- Data Purge
- Change Fatigue

- Flush the Toilet (on bad data)
- Data Hygiene (importance of)
- Strategic Approach
- Know your Needs
- Resist Immediate Implementation
- No system can do everything / do human things
- Stepping stone approach / piloting