

# CCRM Q4 2021 Meetup Notes

## Q&A with MNHOC

- About the [Center](#)
  - Housing intermediary
  - Offers housing counseling services and aid to get people into homes, help prevent foreclosure
  - 30+ member agencies
- How CCRM project became a priority:
  - Idea started in 2015-- encountering limitations with existing system
    - System wasn't enabling them to collect data they needed to improve ops, inform strategy
  - Project would involve 34 agencies
- The product
  - Joined collaborative of orgs looking to build their own CRM
    - BP/NP was part of that group
    - That resulted in a product-- Launchpad
    - Quickly after it went to market, it was sold to an org with a similar product
    - Both required that each entity had their own SF instance
    - With COVID, they announced a delay in implementations
  - So then reevaluated options for products, landed with HomeKeeper
- The core team:
  - Karen
  - Member specialist tier one support
  - Staff from HK + NP
  - Worked with agency stakeholders via taskforce of reps from agencies + worked 1:1 with larger capacity orgs in their network
  - Benefit: time was on their side-- they'd been talking about this for a while and agencies were "anxiously awaiting a better tool... their needs were vastly outpacing their current system"
    - Due to all the due diligence MNHOC had done + their vantage point of seeing all orgs' use of CRM, the MNHOC had a good understanding of agencies' needs & were able to guide their engagement effectively
- The Model:
  - Went with shared model (1 instance) + 3 distributed instances, but that wasn't the original plan
  - Talked with peer who had 1 shared instance + some members on their own
    - Realized the advantages of 1 system + challenges for members to keep up in their own systems
      - "Success with SF requires someone to be in charge of SF"
    - That convo tipped the scales
  - For orgs already in SF, it was gonna be a challenging sell--
    - They'd made customizations and tailored their systems, would be very hard to ask them to scale back/conform to 1 instance
    - They already had skills needed to manage their own sys-- incl admin skills
    - So those orgs kept their own systems
  - Parameters for indep org:
    - You have to have SF + NPSP + HK
    - Otherwise it's too hard to collect & aggregate the data

- Data collection:
  - They collect data from all orgs they provide pass-thru funding to
  - Shared CRM instance = quick access to data
  - Collecting from their distributed instances (3) every quarter
    - But realized they actually needed data more quickly
    - So 2 orgs work live in the shared instance to provide data more frequently to collect data according to funder requirements
  - Plan for 2022:
    - Figure out way to automate distributed agency's reporting to the Center (rn, it's export/import)
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- Outcomes/results/reflections
  - "Overwhelming immediate impact"
  - Easy wins
  - Started implementing FA so consumers could enter info themselves→ saved time for line staff
  - Had a lead pack of orgs adopting who led the way for others
  - With COVID, have been getting more and new requests for services--
    - Have expanded the core solution with new objects for new funding opps
    - Ex: new object to collect data about clients going thru program, check elig requirements, connects to acctg system to allow for direct payments to homeowners
    - "I can't imagine how we'd do this in our old sys"
  - It's opened up people's perspective about the tool--
    - They see it supporting new work in a new way → seeing the advantage
    - They can tell new stories about their data-- i.e. diff applicants in diff stages, ways clients are being paid
  - They're able to quickly build capacity to distribute funding that municipalities weren't able to do themselves
  - Secondary impact: makes a diff in staff's day to day work....
  - Able to tell stories with data:
    - How payment are going out
- How often are you collecting data:
  - Two distributed orgs are working in their org live - quarterly reporting and allowing people to use the system real time to report
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## Open Discussion

- Issues with collecting data from distributed orgs-- what if they change their fields so the data isn't standard anymore?
  - An set up automation so SF monitors a certain # of fields--
  - Create a date field that updates based on a particular set of fields being changed
  - Using staging tables for mass data loads --
    - Claudio rec'd "you can also implement a pre-validation process before running the actual load. similar to NPSP data load process"
  - Alt: doing direct sync between orgs instead of export/import--

- The issue is authentication--
- Usually one-way sync, from distributed to central org
  - You could use a platform user
  - But potential for error increases and the diagnostics take time -- you don't know what records failed
- Peter C's done something similar but relying on staging tables:
  - Distributed and central orgs use staging tables, which are populated based on flow that monitors changes to some field set (for example)
  - If there's an error, you can see it in the staging table & rerun
  - Gives you an audit trail -- you know what the distributed org sent, what the central org received
- Another option is certificates-- workable with managed packages
- It's def doable, have multiple options, but need to be thoughtful