# Choosing the right CRM for your heritage organisation: Part 2

SUPERHIGHWAYS

# What we'll be looking at…

A CRM to help you better use data to demonstrate impact, reach more people and shape future services.

Aimed at heritage organisations wanting to improve their data collection, analysis and presentation and be more efficient and effective in their data use.

# What we'll cover today...

- ✓A recap on Part 1
- ✓Building your functional requirements checklist
- ✓Mapping systems and data flows
- ✓User journeys and process mapping
- ✓Responsible data cycle & GDPR
- ✓Intro to our CRM research
- ✓Data clean up / consolidation tips
- ✓System set up and customisation
- ✓Embedding your system – tips for maintaining it's relevance

# A recap

✓Systems audit
✓Data stakeholders
✓User personas
✓User stories

| 50% of work | | | 10% of work | 40% of work | | |
|---|---|---|---|---|---|---|
| **1. Scope** | **2. Plan** | **3. Specify** | **4. Select / develop** | **5. Prepare** | **6. Test & train** | **7. Implement** |
| •Time<br>•Budget<br>•Equipment<br>•Infrastructure<br>•Security<br>•Mindset<br>•Stakeholder mapping | •Project lead<br>•Timeline<br>•Theory of change<br>•M&E framework<br>•Buy-in<br>•Culture change<br>•Operational changes | •Technical requirements<br>•Functional requirements<br>•User profiles<br>•Data uses | •Explore choices:<br>•Off-the-shelf<br>•Build your own | •Current data consolidation<br>•Customisation<br>•Migration<br>•User materials | •Alpha test<br>•Technical redevelopment<br>•Beta test<br>•User training | •Full roll-out<br>•Ongoing user support<br>•Database maintenance |

# Identifying functional requirements


## Goals:

- Equip young people with the knowledge, skills & contacts they need to get a job

## Usage practices:

- Office based but runs skills training sessions community centres across the borough.
- Uses her own personal laptop for external training sessions to access training materials & training lists

## Tasks/Activities:

- Link young people up with mentors to help them on their journey to employment
- Deliver skills training to young people to help them get jobs
- Make sure young people are aware of the opportunities out there

## Frustrations/pain points/feelings:

- No online database or training material location means lots of prep before & after the sessions
- Reliant on wifi in training centres to get online
- Aware that the current mainly paper based system is wasting time but anxious about upskilling to go 100% on line
- Using own laptop so shouldn't really download or store client's data but it's hard to avoid

**As a** **Trainer** who links young people with mentors

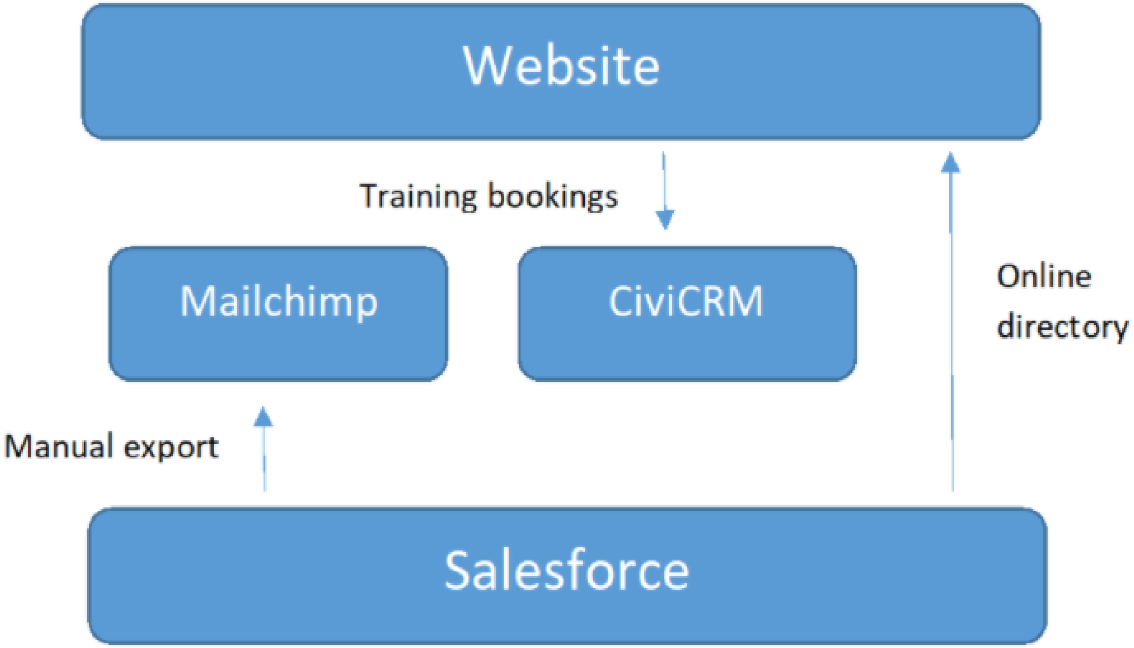
**I want** to be able **to identify all available mentors, their area or expertise and their location**

**So that** I can **match appropriate mentors with young people**

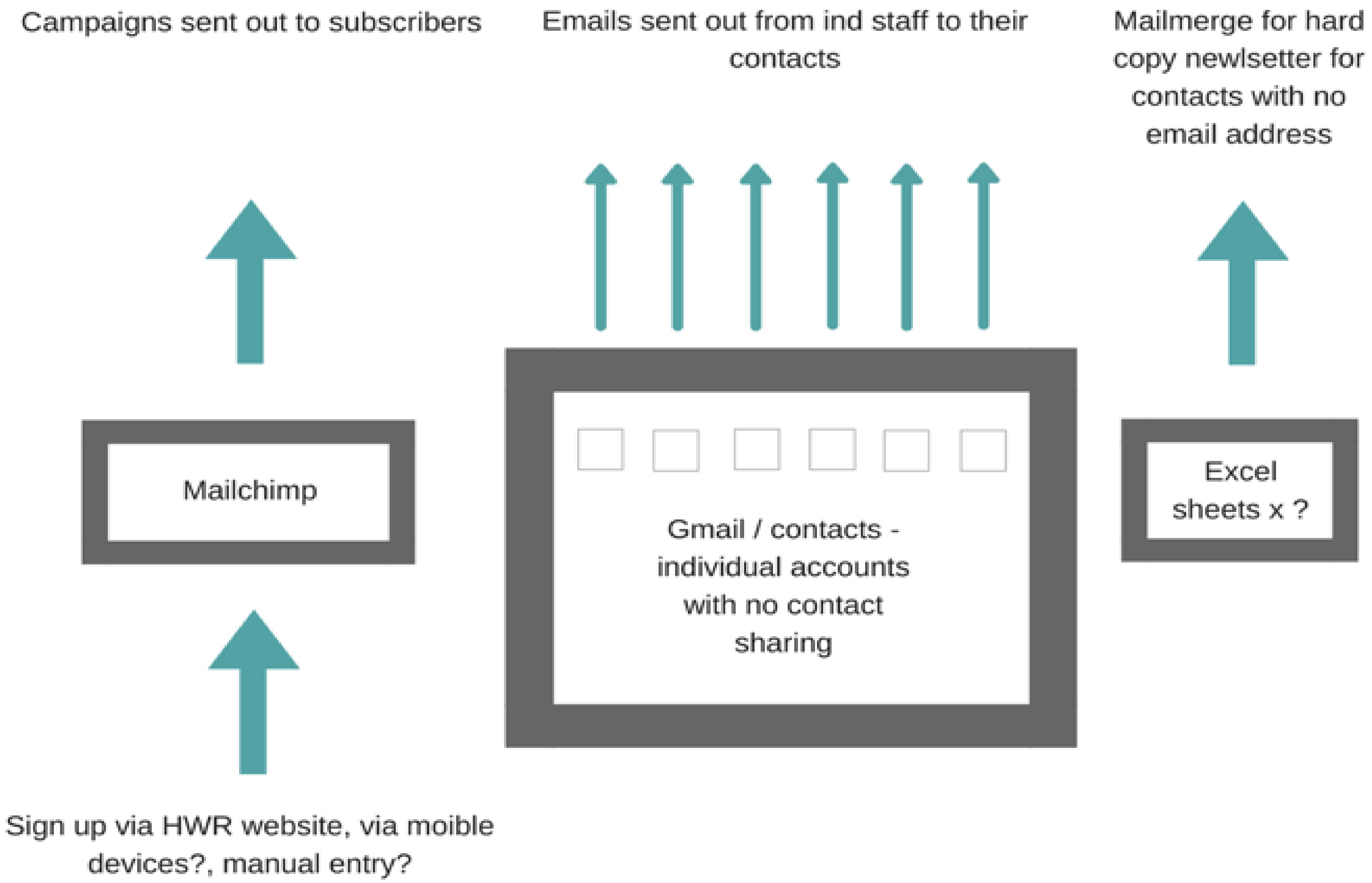
| The what<br>(Functional requirement) | The why<br>(Justification for requirement) | Stakeholder | Essential | Desirable | Leave where it is & link | Alternative solution | Wishlist |
|---|---|---|---|---|---|---|---|
| Online access to training materials | To ensure the trainer has the latest version of the training material with them when training exernally | Staff-Trainers | | Yes | | Put on our website in a protected page or on a shared online drive | |
| Secure online access to check off training session attendance | Online check in for attendees would allow for secure, real time updating of attendance records & keep particiant info (name, tel number etc) confidential | Staff - Trainers | Yes | | | | |
| Offline, mobile access to training materials & attendance lists | To access the training materials when off site in a location without wifi | Staff - Trainers | | Yes | | Equip staff with Mifi to enable them to get online anywhere | |
| Feedback surveys to feed into participant records | To ensure mentor & participant feedback surveys are collated in the participant's record | Staff - Trainers | Yes | | | | |
| Participant progress monitoring | Visual report to measure individuals progress using the participantion records &feedback surveys to mentors & participants at start/mid-way & end of the programme | Staff - Trainers and Programme Manager | Yes | | | | |
| Link mentors to participants | To be able to identify which mentor is assigned to which particpant & who is currrently unassigned | Staff-Trainers | Yes | | | | |
| Mapping tool to see the location of mentors and participants | To be able to identify which unassigned mentor is closest placed geographically to participants needing a mentor. | Staff -Trainers | | Yes | | Export the postcodes to an external mapping tool | |
| Newsletter mailing | To be able to email out tailored newsletters to participants, mentors & donors | | | | Leave in Mailchimp and link to database? | | |
| Online registration for participants to create provisional database record (approval required for upload) | Enable online self-registration and link directly into our datbase but ensure we don't end up with duplicate, incomplete or incorrect records | Beneficiaries & Staff | Yes | | | | |

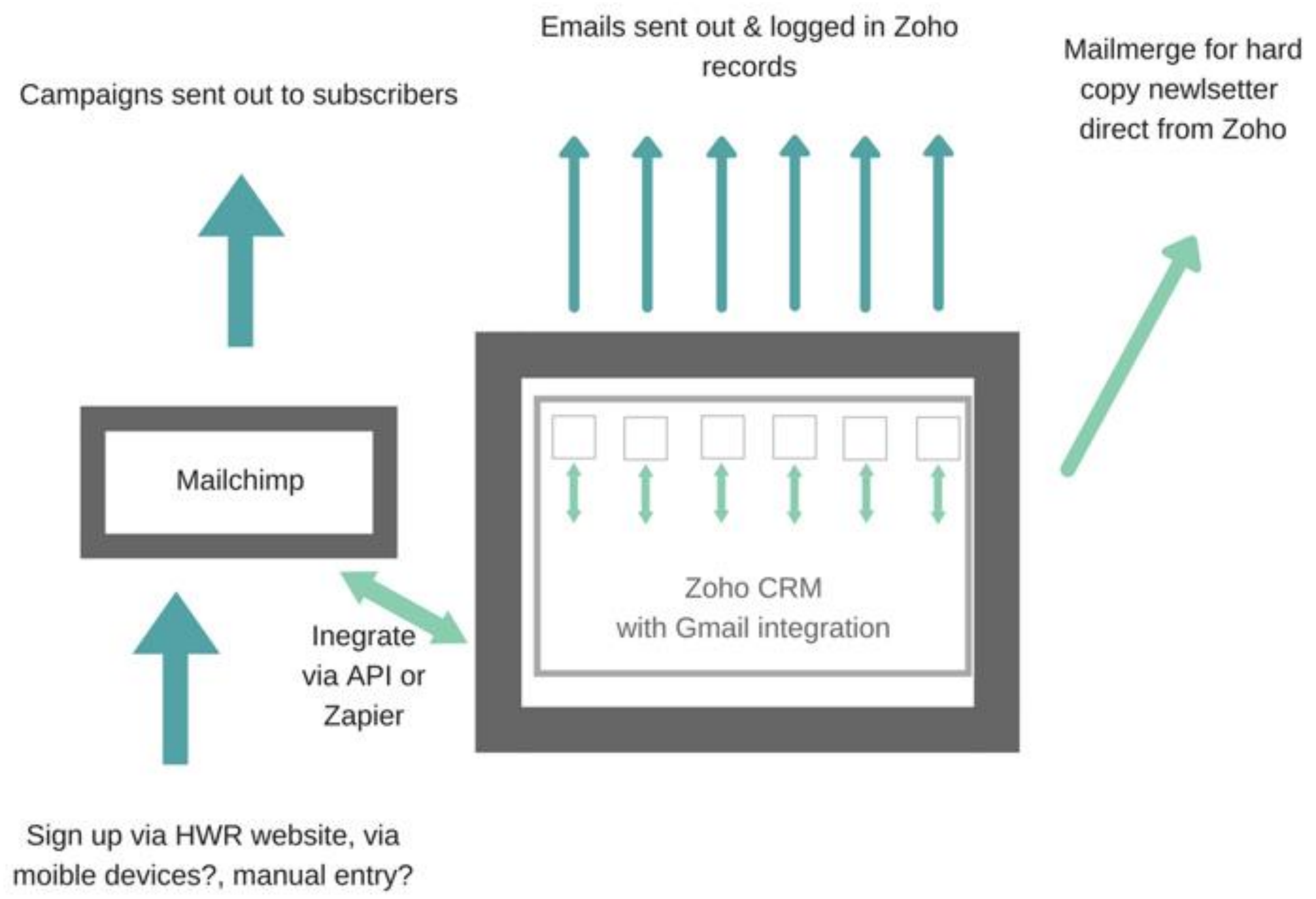
# Mapping systems and data flows

Representation of current systems and link between them.



## Current set up




Emails sent out & logged in Zoho records
Campaigns sent out to subscribers
Mailmerge for hard copy newlsetter direct from Zoho
Mailchimp
Zoho CRM
with Gmail integration
Inegrate via API or Zapier
Sign up via HWR website, via moible devices?, manual entry?

# Integrations – to do or not to do!

# 3rd party connectors – build your own

zapier

IFTTT

**TRIGGER**
When I get a new email in **Gmail**

**ACTION**
Copy the attachment from **Gmail** to **Dropbox**

**ACTION**
Alert me in **Slack** about the new **Dropbox** file

# Office 365 automation

## Power Automate

Create workflows between your apps, files, and data to automate time-consuming tasks.

### Three ways to make a flow

Start from blank

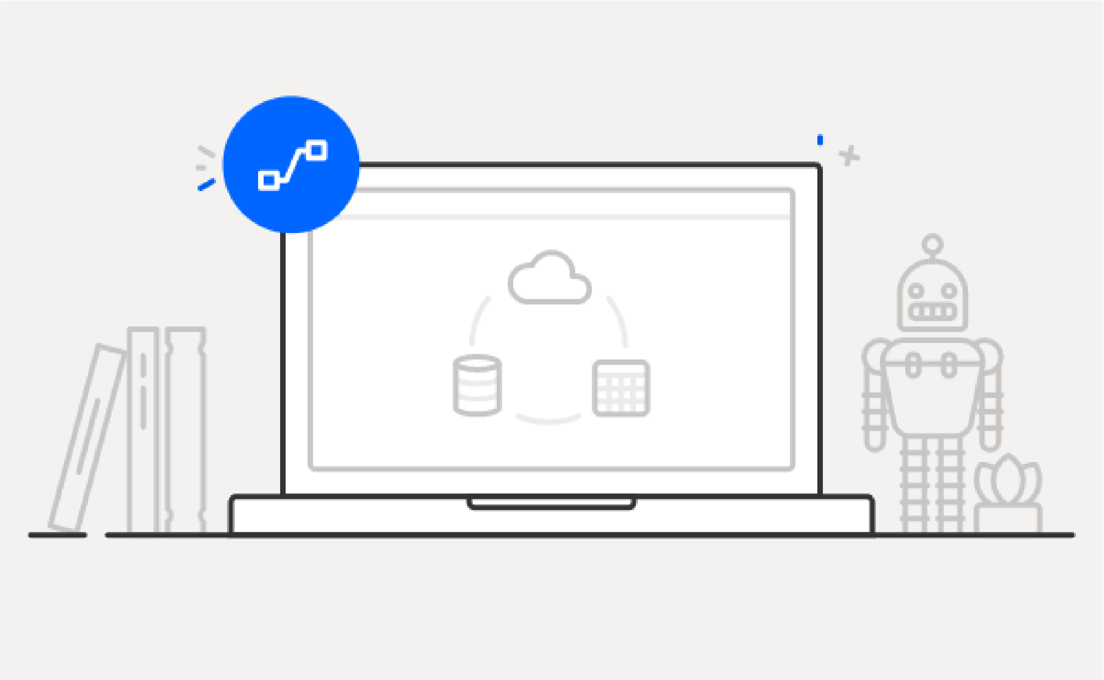
**Automated flow**
Triggered by a designated event.

**Instant flow**
Triggered manually as needed.

**Scheduled flow**
You choose when and how often it runs.

**Business process flow**
Guides users through a multistep process.

# Build an automated flow



Free yourself from repetitive work just by connecting the apps you already use—automate alerts, reports, and other tasks.

Examples:

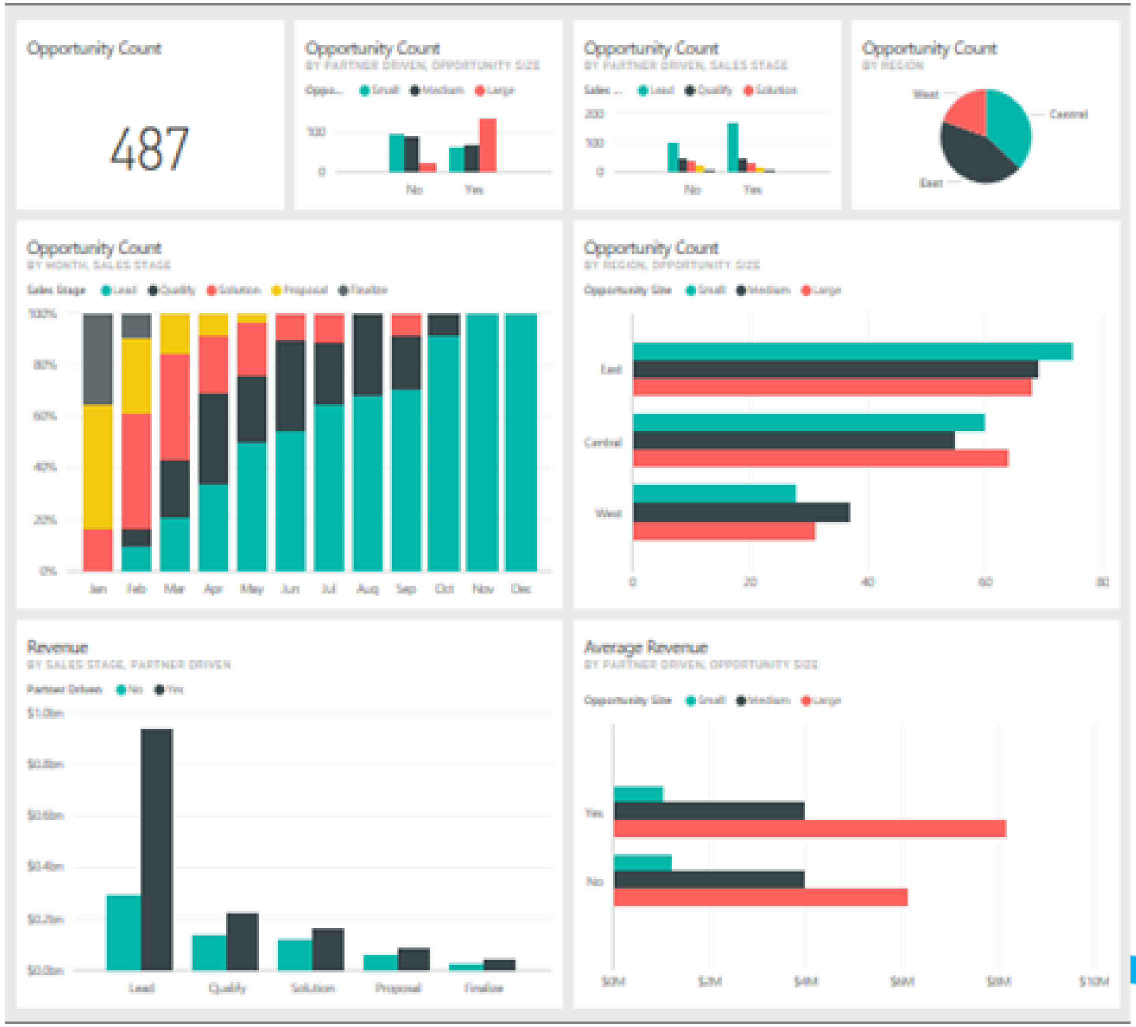
- Automatically collect and store data in business solutions
- Generate reports via custom queries on your SQL database

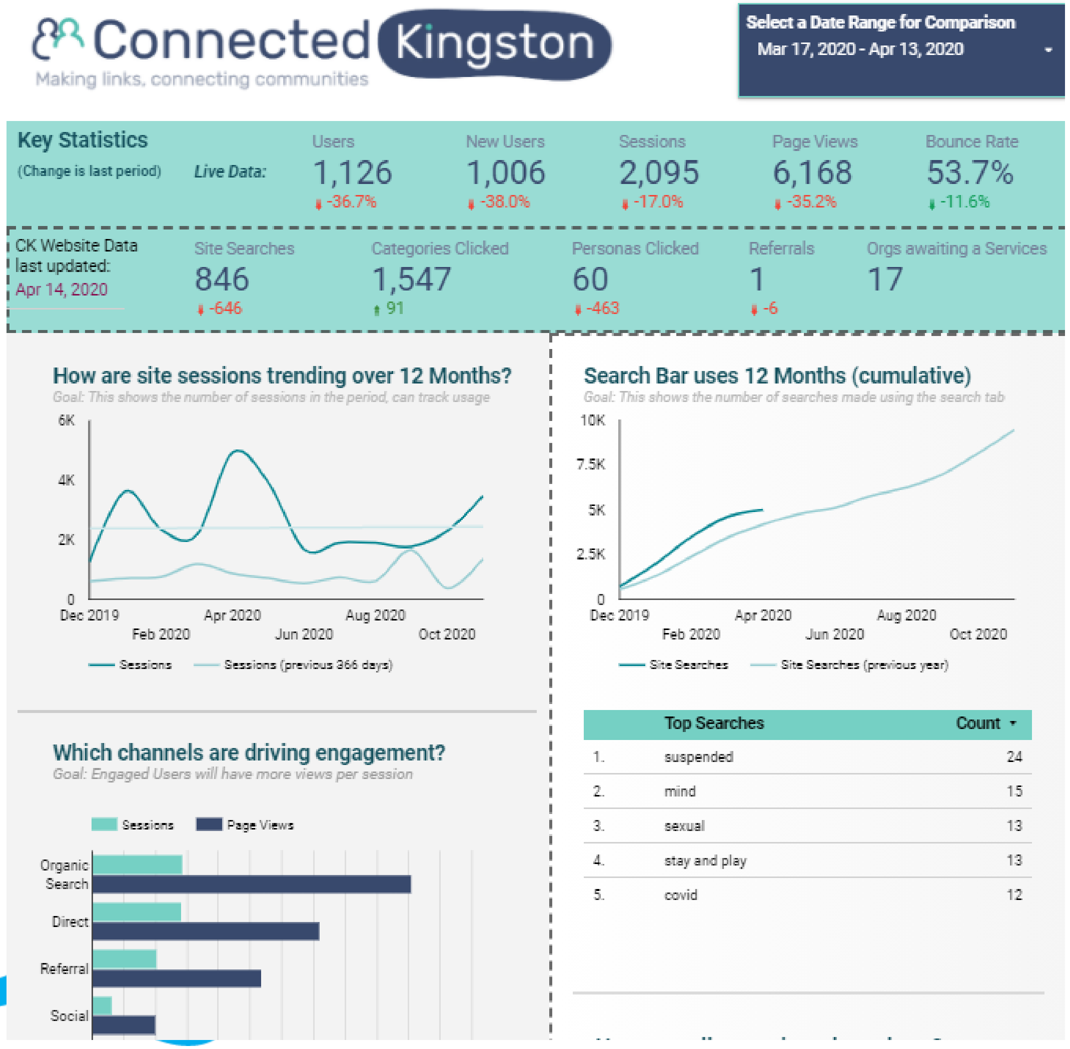
Choose your flow's trigger *

Search all triggers

- When a new response is submitted
  Microsoft Forms
- When an item is created
  SharePoint
- When an item is created or modified
  SharePoint
- When a file is created in a folder
  SharePoint
- When a file is created
  OneDrive for Business
- When a task is assigned to me
  Planner
- When a feed item is published
  RSS

# Power BI / Data Studio



# Mapping your processes

- ✓ Involve the team
- ✓ Are there bottle necks?
- ✓ Things that don’t make sense and it’s just always been done that way?
- ✓ And no one has had the time to rethink / redo
- ✓ Think from your organisational perspective
- ✓ But also be ‘client / stakeholder centered’
- ✓ Has Covid changed how you do things?
- ✓ Look to the future

# User journeys

## Putting outcomes into practice: data gathering opportunities

Tracking a client's journey through your organisation can help you to identify information collection points that should inform the way you develop your system.

| Client's journey | Information recorded |
|---|---|
| Client makes first contact with your organisation | • Client's name<br>• Referral source<br>• Type of contact<br>• Action taken |
| Client is registered /accepted as a client | • Data from initial needs assessment data, for example, background of client (demographic profile)<br>• Client's presenting needs (i.e. baseline outcomes data) |
| Client meets with a key worker on a regular basis | • Data from initial needs assessment data, for example, background of client (demographic profile)<br>• Client's presenting needs (i.e. baseline outcomes data) |

# The Easy Guide to Process Mapping

Updated on: 17 November 2020

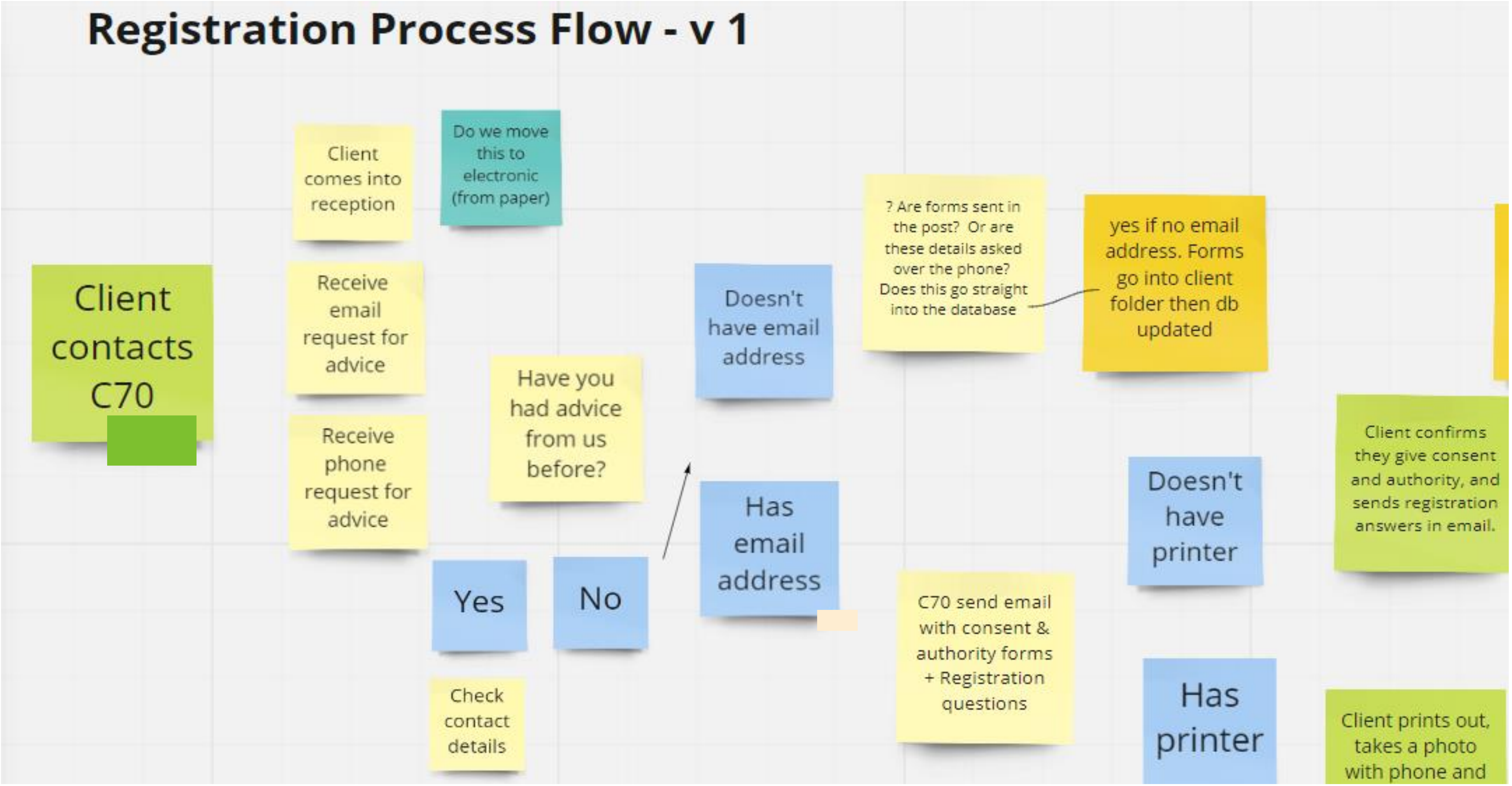
Planning a new strategy? Want to improve customer satisfaction? Want to know why some of your projects are failing?

Process mapping is the first step to find out how and why to these questions above.

In this process mapping guide we will show you;


- What is a Process Map?
- Process Map Symbols
- Types of Process Maps
- How to Create a Process Map
- Process Mapping Best Practices
- Benefits of Process Mapping
- Process Mapping Templates

# It doesn't have to be perfect!



# Data protection by design & default

- ✓Are you registered with the information commissioner? Data Controller? www.ico.org.uk
- ✓Do you have a data protection & privacy policy and explain why you collect data and what it will be used for?
- ✓Do you carry out due diligence on 3rd party systems – IT security and GDPR compliance? Cloud computing ICO guidance
- ✓Is your client data secure i.e. robust passwords, backed up, safeguarded with anti virus software and a firewall? What about remote working & BYOD? NCSC Infographic
- ✓What about collaboration / data sharing?
- ✓Data protection after Brexit – briefing paper

# 4. Select / develop

**Select / develop**

- Explore choices:
- Off-the-shelf
- Build your own

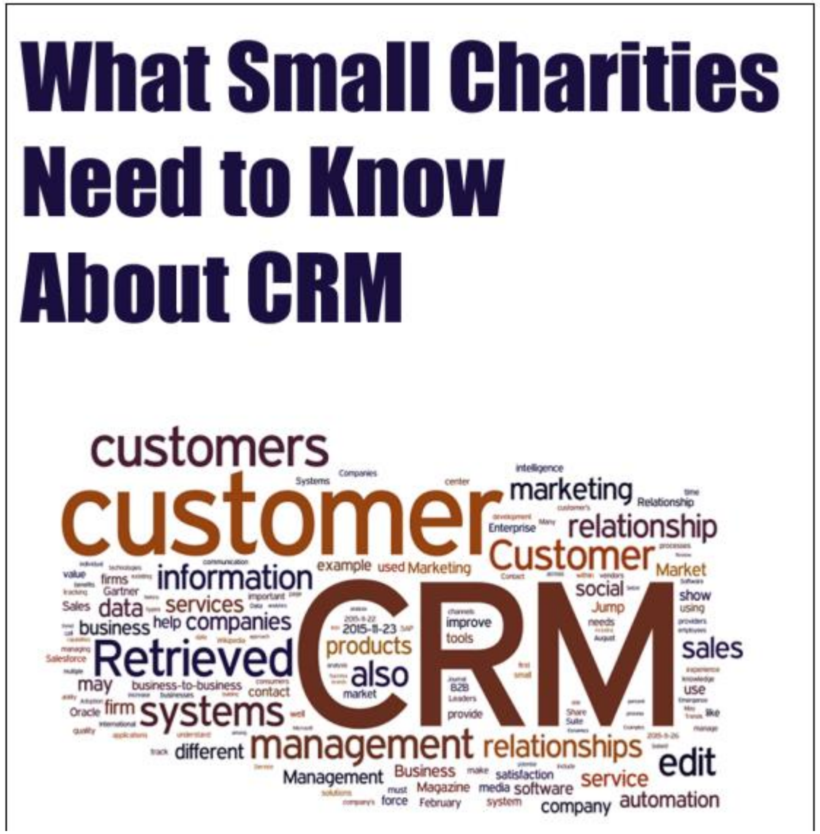
- ✓ You're 60% of the way through!
- ✓ We're researching some of the best options for small charities
- ✓ Next time we'll look a the different types of systems and build in time for you to have a look at which may be 'fit for purpose' for your needs

| Product | Pros | Cons |
|---|---|---|
| **The big players** | | |
| Microsoft Dynamics 365<br>Salesforce NFP<br>Civi CRM | Single source of truth, organisation-wide database, catering for a large portion of your business needs. | Complex systems - large organisational shift with extensive training before used well.<br>Will require paid-for support if you don't have the skills in-house. |
| **Build your own - (no code/low code)** | | |
| Zoho Creator<br>Knack<br>Airtable | Full flexibility to build a bespoke database that suits your unique ways of working and data collection/analysis needs. | Learning curve and you will need skills, time and commitment in-house to build these yourself. Or pay for support.<br>Building something from scratch when something already exists that will fulfil 80% of your needs. |
| **Off the shelf All rounder - Customise & configure** | | |
| Simply Connect<br>Lamplight<br>Views<br>Charity Log<br>Better Impact | Great understanding of the charity sector - will feel well understood when describing your needs.<br>No middle man when seeking support - dealing direct with company. | Some of the user interfaces are dated and, as such, use on mobile devices can be limited.<br>Greater upfront cost to these systems – not necessarily negative. |
| **Off the shelf Impact focussed - Customise & configure** | | |
| Upshot<br>Impact Tracker<br>Time to Spare<br>TP Tracker<br>Makerble | Tight focus of these systems - quicker to implement and easier to learn to use. | May need a larger system down the line so consider how future-proofed your decision is. |
| **Bolt on Impact tools** | | |
| Outcome Stars<br>Impactasaurus | Simple, well-evidenced tools to measure distance travelled outcomes. | Not designed to act as a CRM solution. |

# Peer swap!


https://charitycatalogue.com

https://itforcharities.co.uk

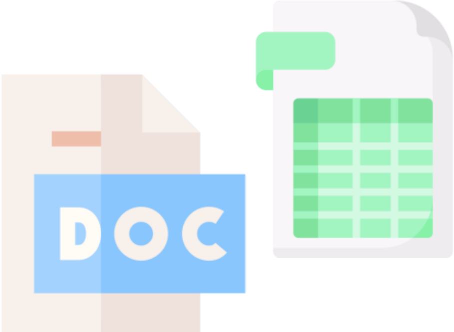



https://www.capterra.com

# Crowdsourced – decision influencers

- ✓ Scalability
- ✓ Costs / charity discounts available
- ✓ Mobile vs desktop apps
- ✓ Organisational policy – tools / platforms & methodologies
- ✓ Integration / automation possibilities
- ✓ Accessibility
- ✓ People / culture
- ✓ Internal / external use
- ✓ Support / training available
- ✓ Security / data governance

# 5. Prepare




## Prepare

- Current data consolidation
- Customisation
- Migration
- User materials

✓ A proper data spring clean

✓ Migrating your data from Excel or your old system

✓ Customisation (how they set things up for you) & configuration (how you can change things yourselves in the future)

✓ User materials for each of your user profiles

# 6. Test & train

## Test & train

- Alpha test
- Technical redevelopment
- Beta test
- User training

✓Initial training

✓Pilot with small group (one from each user profile)

✓Go back to the database provider and redevelop

✓Test again

✓Ongoing training – new users, change in responsibilities, refreshers

# 7. Implement

## Implement

- Full roll-out
- Ongoing user support
- Database maintenance

✓The end of implementation but the start of TLC!

✓Ongoing configuration, data quality, GDPR, user requests, workforce enthusiasm!

✓Book in regular reviews going forwards (6 monthly / annually etc)

# Improvements – Salesforce implementation

✓Organisation and IT = culture shift

✓Remote working = stable and consistent = travel time saver

✓Reimagining our programmes = process invites questions, critique of long standing structure

✓Team closer to targets, evaluations and seeing their results

✓Reporting - 1st completed report without asking team to complete additional Word template!

# Top tips for success (from organisations who've done it)

- ✓ Factor in time to review what needs to be adapted from the very start - let the people using the system know so that they can advise you.  This will help staff buy in
- ✓ Needs to be on team meetings agendas as a regular item
- ✓ Having a key person to drive things forward (someone who is passionate and competent with data)
- ✓ Having designated time built in to roles for workers to enable good data collection
- ✓ Think about the end user - e.g. more sophisticated & knowledgeable staff or low tech savvy volunteers

# Top tips for success (from organisations who've done it)

- ✓ Test & trial e.g. at the beginning of a new project so you can check it's working and make changes early on
- ✓ Explore a range of systems and go and see people who are using them now for their experience and challenges
- ✓ Review regularly - what are the problems & gaps? What are you missing? What are not using it - remove it…
- ✓ Buddy up with other similar organisations and share learning / support

# Thank you for listening!

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