Choosing the right CRM for your heritage organisation

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

✓Scoping the bigger picture – data what's and why's

✓Process overview

✓Data culture - bringing your users on the journey

✓Defining functional requirements

Thursday

✓Vendor selection – CRM options for small heritage organisations

✓Data clean up / consolidation tips

✓System set up and customisation

✓Embedding your system – tips for maintaining it's relevance

In other words…

- ✓More about the process, less about the product
- ✓We can't tell you which one to choose (sorry!)
- ✓What we mean by database
- ✓Our recommended process
- ✓Our database research
- ✓Practical resources to help you

What do you currently use?

Zoom poll…

- ✓Pen and paper
- ✓Excel spreadsheets / Word docs
- ✓Online tools – e.g. surveys, forms,
- ✓A few different databases
- ✓One main database

What are your 3 biggest challenges for implementing a database?

- ✓Don't know where to look for trusted guidance
- ✓Lack of clarity on the true cost
- ✓Not sure what we need
- ✓Lack of time
- ✓No one to lead on the project
- ✓Difficult to understand what different systems actually offer
- ✓Lack of budget
- ✓Other

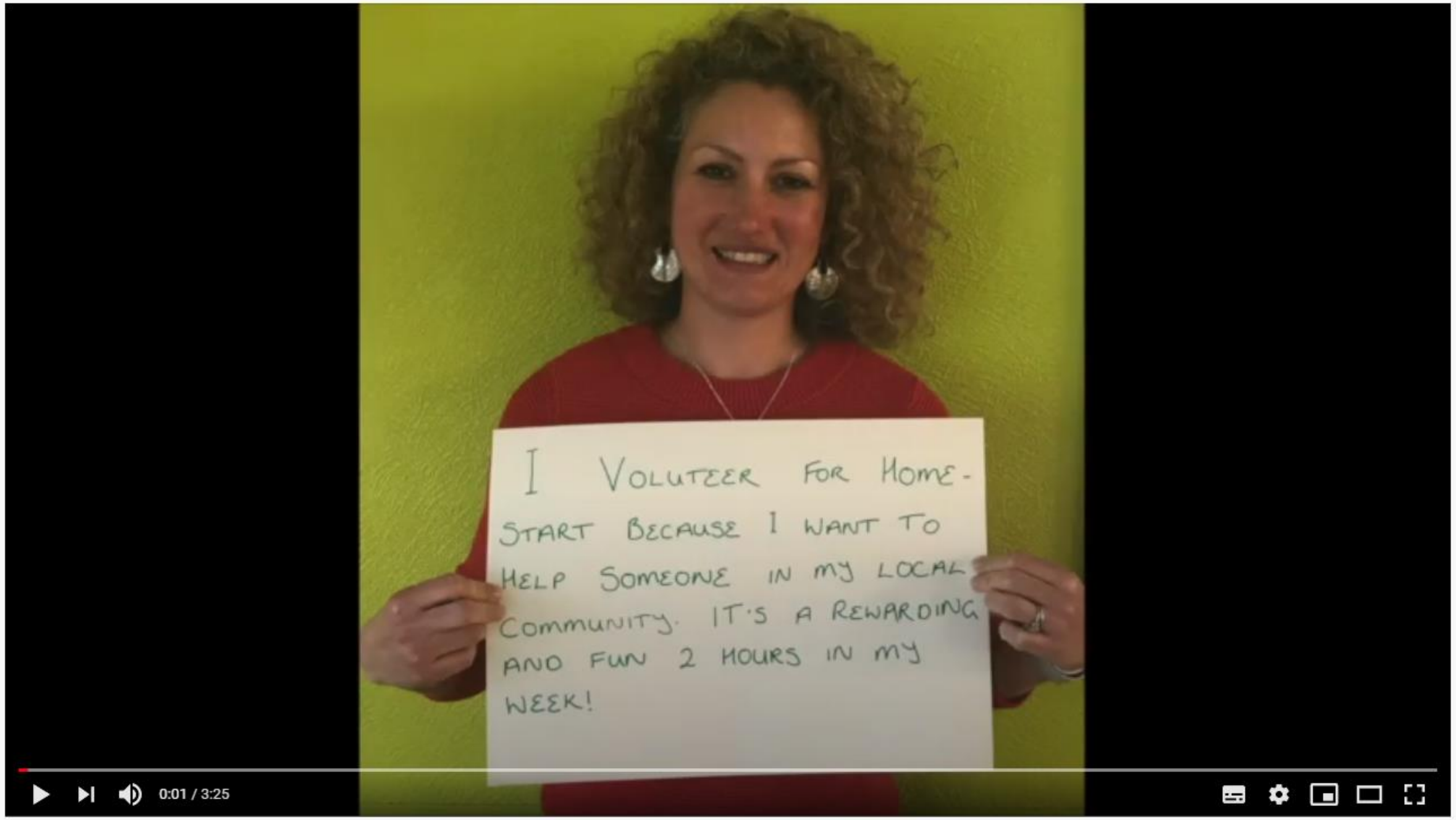
What do we mean by a CRM/database?

- ✓A CRM (**C**ustomer **R**elationship **M**anagement system) can refer to all sorts of 'customers': your members, donors, volunteers, partners, people you want to make aware of your services, commissioners, funders…the list goes on.

- ✓We're keeping our focus tight: a database that collects and analyses data about your service users, how they engage with you and the impact of that.

The people you work with **How they engage with you** **The impact of that**

Hear from an organisation who's done it!



Our process: implementing a database

60% of work			10% of work	30% of work		
1. Scope	**2. Plan**	**3. Specify**	**4. Select / develop**	**5. Prepare**	**6. Test & train**	**7. Implement**
•Time •Budget •Equipment •Infrastructure •Security •Mindset •Stakeholder mapping	•Project lead •Timeline •Theory of change •M&E framework •Buy-in •Culture change •Operational changes	•Technical requirements •Functional requirements •User profiles •Data uses	•Explore choices: •Off-the-shelf •Build your own	•Current data consolidation •Customisation •Migration •User materials	•Alpha test •Technical redevelopment •Beta test •User training	•Full roll-out •Ongoing user support •Database maintenance

1. Scope

Scope
•Time
•Budget
•Equipment
•Infrastructure
•Security
•Mindset
•Stakeholder mapping

- ✓Zoom out
- ✓Systems audit: what you currently have
- ✓Do you have time, money, equipment?
- ✓Invest or start afresh?
- ✓Stakeholder mapping: what you want a database for – service users, volunteers, donors, membership, partners, referrers?
- ✓How to bring everyone on the journey?

Systems audit template

System name e.g. registration form, member list or client	Application used e.g. Word/ Excel/ Access/ CRM etc	Description of what it's used for including type of data collected / stored e.g. names, attendances, work carried out	Who uses it – are there restrictions as to who can access, modify etc?	Can you produce reports from the 'system'? (as appropriate)	What are the risks/benefits to using this system (for example security, ease of use, etc.)	Are there any challenges / issues you have using this tool or 'system'?	What would make use of this tool / 'system' more effective?
Helpdesk	WebHelpDesk	For our Tech support service. Holds contact details of all our members and other organisations accessing this service. Enables us to log tech support provided - for reference and also monitoring access against support package (used to check service level at annual renewal). Emails to helpdesk@superhighways automatically creates a ticket	Restriction of 5 licences. Tech team + generic tech support.	You can filter different views and produce various reports as pdf or download as CSV	Client data secure	Staff not always updating in real time. Users creating new tickets not adding to existing ones.	Better reporting to track Membership service used. Need to explore further what's possible. Potential automation of invoicing? Would an app on mobile phone be useful for quick updates on the go? Need more licences.
Digital support request form	O365 Form	Collects new digital support requests (non members) Functions as an initial enquiry form with contact details and further information of issue. (Provides more structure information and a reference point in one place than ad hoc emails to different staff)	Sorrel, Kate, Philippa	Form responses create a real time updated Excel spreadsheet. We can then filter etc	Free. Quick and easy to use	Only one person gets alerted when a new response comes in (but nore worked out how to use Powerautomate to alert other emails too)	If this information could be brought together with Helpdesk info and other spreadsheets / Eventbrite data where we've potentially provided other services to that organisation & for easier reporting to funders etc
Training Excel sheet	Excel	Downloaded from Eventbrite for monitoring & evaluation. Links into Power BI for analysis and sharing.	Everyone	In theory everyone but it's tricky to use in Excel as the file is so huge so we've linked it to Power BI so we can share interactive dashboards internally & externally	Free. Quick to set up new templates for new projects/workstreams. Team all have good Excel skills. Data security not watertight. No audit trail.	Not a real time link with Eventbrite so we have to download manually. The high load of training we're doing during Covid is making this a challenge to stay on top of.	A real time link with Eventbrite using Zapier or Microsoft Flow. A centralised database to link the two workstreams together.

Go to

www.menti.com

Enter the code

33 49 90 2

https://www.menti.com/kfck2d7obe

Name up to 3 systems you are currently using

Mentimeter

Data stakeholder mapping

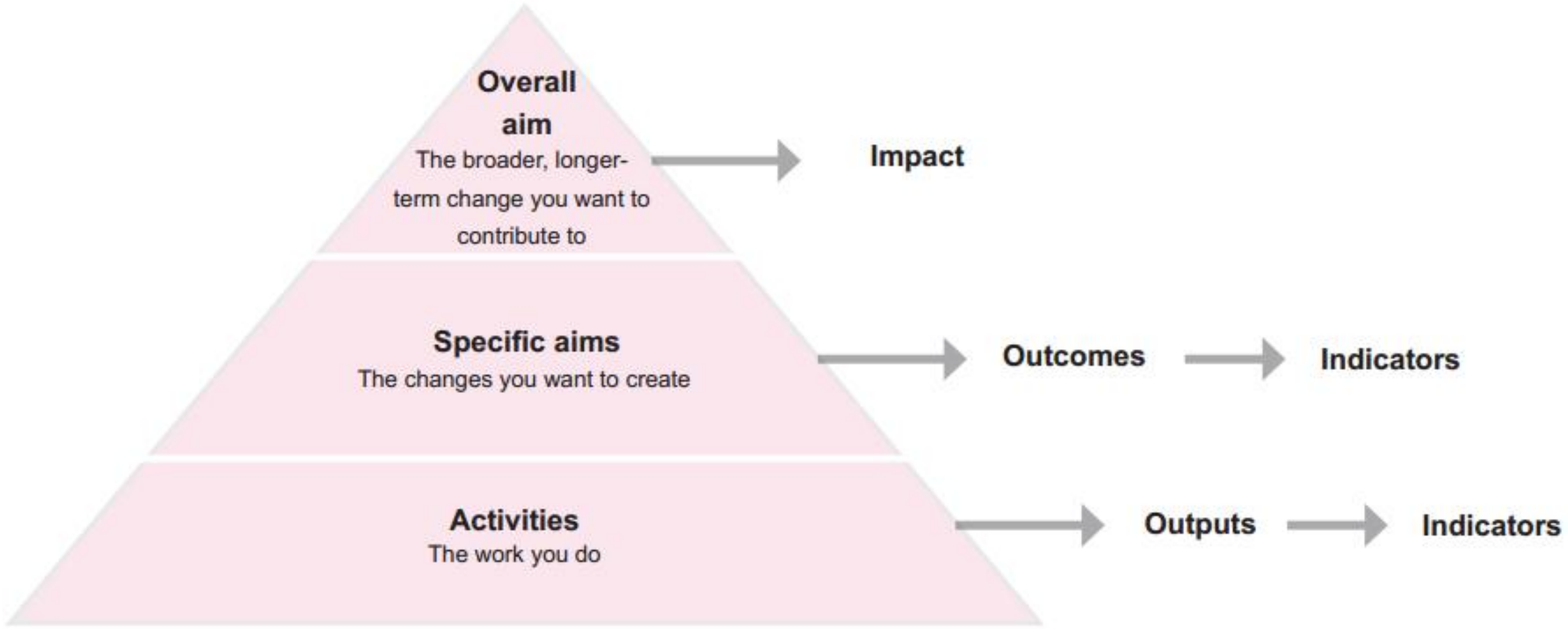
- **Staff**
  - Caseworkers
  - HR
  - Finance
  - Management
- **Volunteers**
  - Admin
  - Helpline
  - Community fundraiser
- **Trustees**
  - Board
- **Beneficiaries**
  - Young people in residential care
  - Young people living at home
- **Donors**
  - Casual givers
  - Legacy givers
  - Individual donors
  - Corporate donors
- **Funders**
  - Local authority
  - Corporate funder
  - Community foundation
- **Partners**
  - Libraries
  - Local Colleges
  - Local charities
  - Religious groups

2. Plan

Plan
•Project Lead •Timeline •Theory of change •M&E framework •Buy-in •Culture change •Operational changes

- ✓Key person responsible
- ✓Strategic planning – ToC, M&E Framework
- ✓Cultural / operational changes:
    - ✓Value of the database
    - ✓Apprehensions
    - ✓Co-production

Outcomes frameworks



© CES Planning Triangle

See How to create a planning triangle NCVO article

Theory of Change intro

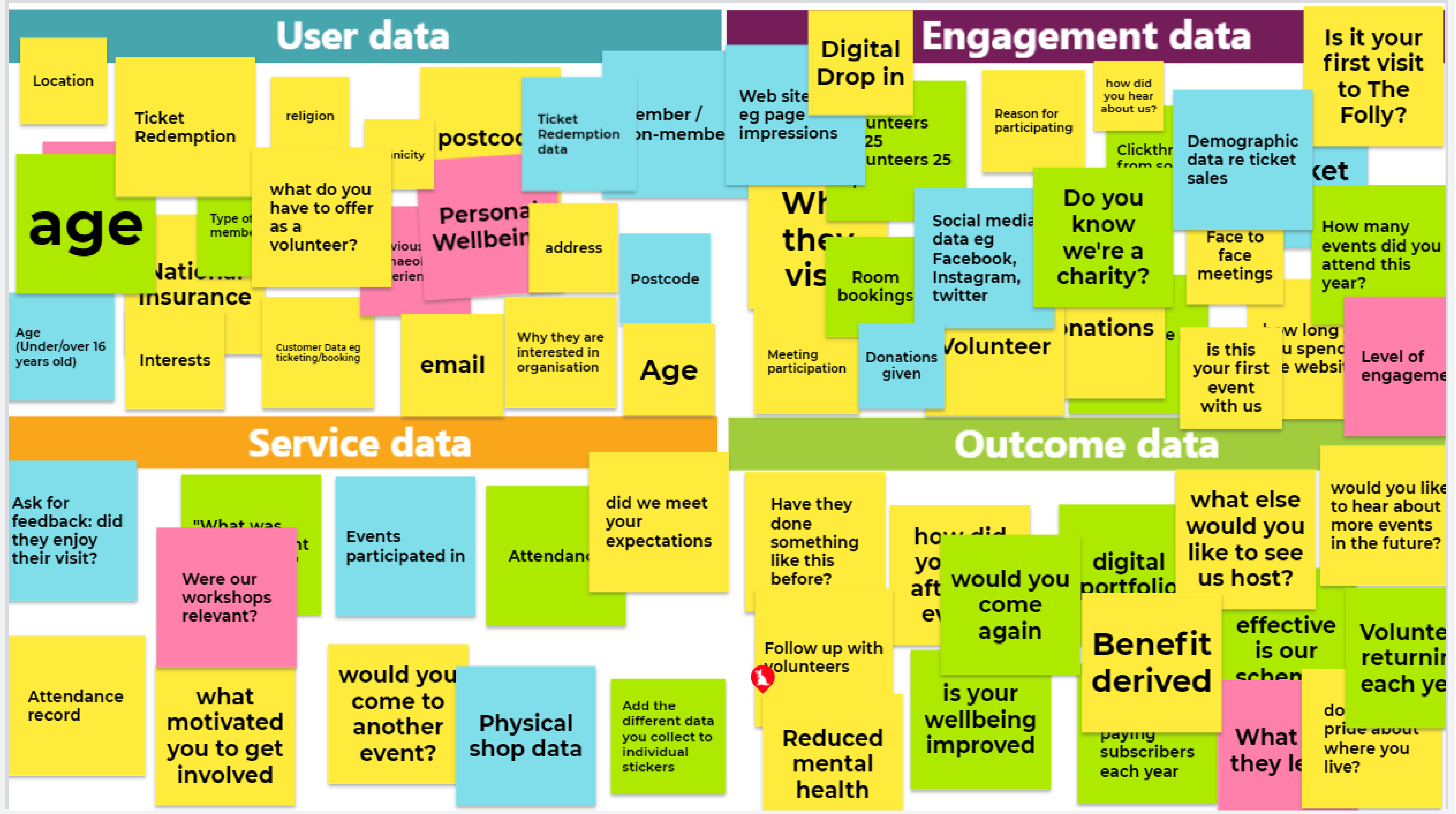
Theory of change

Activities	Short term outcomes	Medium term outcomes	Long term outcomes	Impact
Attending music sessions	Belonging to a group with shared experience	Greater feeling of affirmation & value	Increased feeling self-worth	People lead a positive and meaningful life
Building a relationship with a mentor	Comfortable making mistakes	Greater belief in ability to achieve	Greater determination to succeed	Reduced re-offending
Setting goals	Opportunity to form new friendships	Improved ability to work with others	Increased sense of hope	
Composing music/ songs	Opportunity to self-reflect, understand & express self	Improved self-discipline	Development of positive identity away from that of an offender	
Recording/performing/ achieving certificates	Opportunity to learn from a role model	Improved musical skills		

Types of data

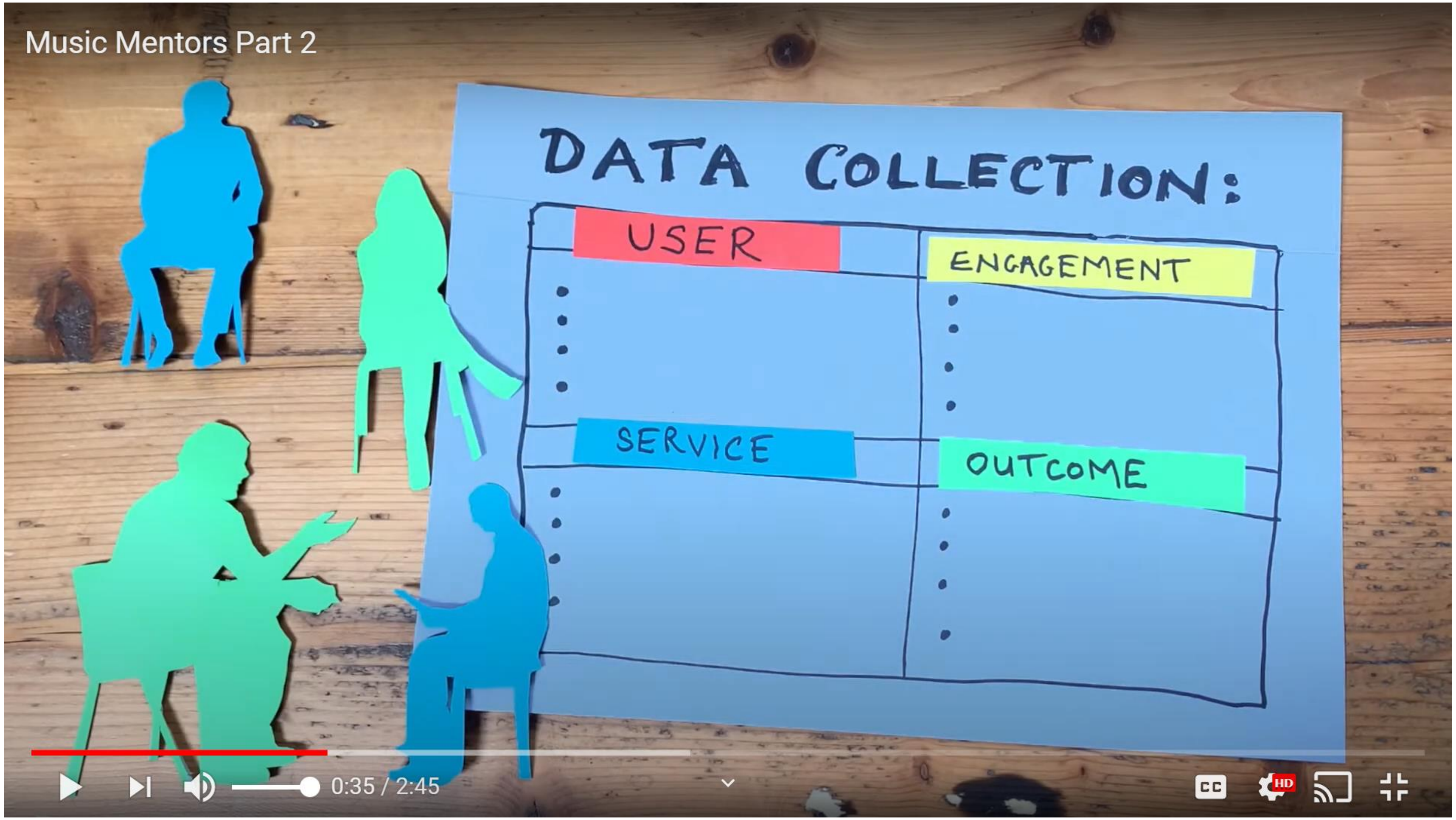
User data	Engagement data
Asks: demographics, characteristics, reason for coming service	**Asks:** how people engage, frequency, why they stop
Establishes: your target audience, who you are serving	**Establishes:** the extent to which people use your services and how

Service data	Outcome data
Asks: what they liked / didn’t like, why, what they would change, what is special	**Asks:** what has changed as a result of using the service, what have people gained
Establishes: whether users are satisfied and your service is working as intended	**Establishes:** short-term and long term impact on people’s lives

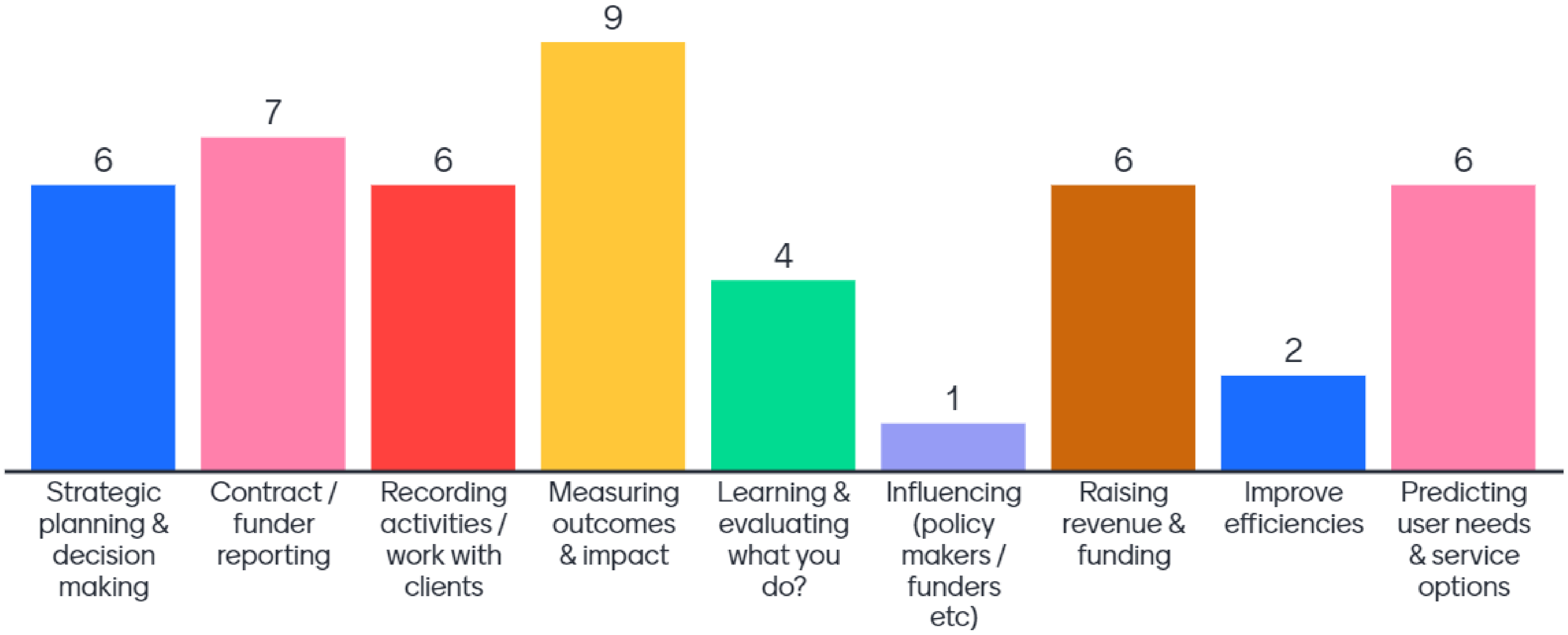


User data
Location
Ticket Redemption
religion
Ticket Redemption data
age
what do you have to offer as a volunteer?
address
Postcode
Age (Under/over 16 years old)
Interests
Customer Data eg ticketing/booking
email
Why they are interested in organisation
Age
Engagement data
Digital Drop in
Web site eg page impressions
Reason for participating
how did you hear about us?
Is it your first visit to The Folly?
Demographic data re ticket sales
Do you know we're a charity?
Social media data eg Facebook, Instagram, twitter
Room bookings
Face to face meetings
How many events did you attend this year?
Meeting participation
Donations given
is this your first event with us
Level of engageme
Service data
Ask for feedback: did they enjoy their visit?
Were our workshops relevant?
Events participated in
did we meet your expectations
Attendance record
what motivated you to get involved
would you come to another event?
Physical shop data
Add the different data you collect to individual stickers
Outcome data
Have they done something like this before?
would you come again
what else would you like to see us host?
would you like to hear about more events in the future?
Follow up with volunteers
Benefit derived
is your wellbeing improved
Reduced mental health
subscribers each year
where you live?

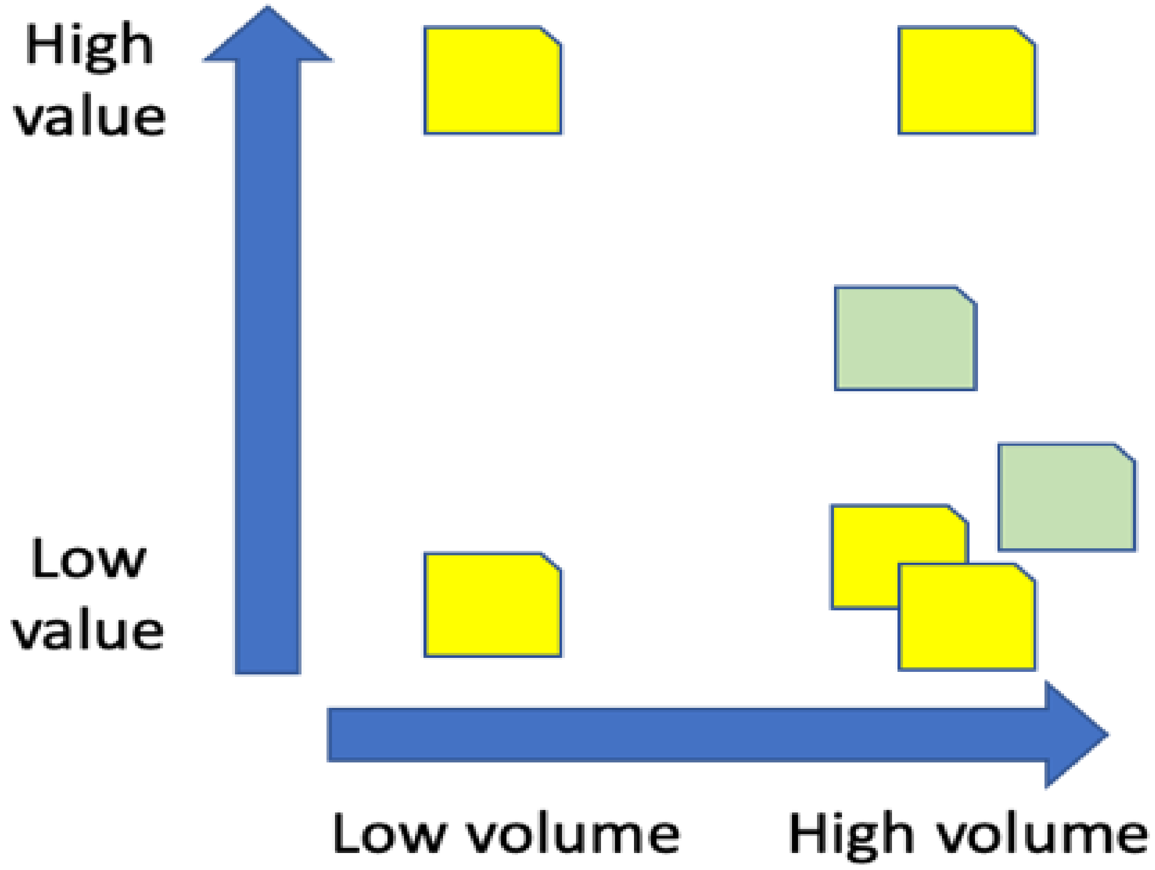
Types of data



What do you use the data you collect for? Pick your top 3...



How do you use it – sorting exercise



- Measuring impact
- Influencing funders
- Promoting services to the public
- Ensuring accessibility

Post-it exercise – goes remote!

AFRIL staff team concerns

Cost

Can we afford it?

Can we sustain it?

Migrating data from existing systems

GDrive
AIMS

Co-ordinating staff time to ensure there is a central process

Compatibility

How does it link to GDrive?

Time

Duplication

Data changes so regularly

Keeping up to date

Volunteer access (can it be read only?)

GDPR

Post-it exercise goes remote!

4 whiteboard tools to try:

- Google Jamboard
- Microsoft Whiteboard
- Miro
- Mural

AFRIL staff team Data ideas / opportunities?

More acheivable aims that can be evaluated properly and influence policy work

Outcomes across projects rather than by projects

Less time accessing & collating & extracting data

Read only access? (to mitigate issues with volunteers in the past)

Identify & focus on capturing data that doesn't change so much but still can evidence change

Cross cutting data

Beneficiary focussed

More time for creative presentation of data

3. Specify

Specify

- User profiles
- Data uses
- Technical requirements
- Functional requirements

✓Sketch out who needs what data, for what purposes (user profiles & data uses)

✓Functional requirements (how it works)

  ✓what goes in/comes out (e.g. stakeholders, analysis)

  ✓how it is used (mobile, permissions)

✓Technical requirements (what it does)

  ✓Fields, pages, relationships, reports etc

✓'Must have's vs 'nice ifs'

User personas

Laura is frontline worker and needs to be able to input data while she's out visiting clients. She isn't hugely confident around tech but can happily use platforms like Amazon, Facebook and Survey Monkey. She doesn't need to see data on an aggregated level and only uses the database to update case notes and re-read them before her next visit.

Sami writes our funding bids and needs to be able to access real-time aggregated data in order to demonstrate the scale of our activities and the outcomes of our services. He always works from a desktop at the office and doesn't need to see personal details of individuals.

User persona example

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

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

User stories

As a **‹type of user›** — Who are we building this for? Who is the user?

I want **‹some feature›** — What are we building? What is the intention?

So that **‹some reason›** — Why are we building it? What is the value for the user?

As a **Support Worker** who organises the food bank deliveries

I want to be able to produce **a list of beneficiaries and their requirements** for each ward in the borough

So that I can know **what & how much is needed for each ward** to prepare parcels and map the addresses for the delivery drivers

Here's some more examples...

As the Administrator I need to know when there are spaces on upcoming heritage walks **so that** I can respond to enquiries and accept referrals

As an Outreach worker I need to be able to record information whilst I'm out and about **so that** I can maximise my time with participants

As a Manager I need to organise rotas **so that** we have the necessary staffing for evening and weekend volunteer cover

Over to you...

As a **‹type of user›** — this is the WHO. Who is the user?

I want **‹some data requirement›** — this is the WHAT. What is the intention? What do they need?

So that **‹some reason›** — this is they WHY. Why do they need it? What is the end use?

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

Check out & next steps

- ✓Feedback what was most useful about today (one thing!)
- ✓Next steps:
  - ✓Share slides and resources with colleagues
  - ✓Get in touch with Superhighways with any questions or ideas
- ✓Next session – Thursday 3rd December, 10 – 12.30