



# CRM: Stick or Twist

THE ROLE OF FUNDERS, INFRASTRUCTURE &  
DATA SUPPORT PROVIDERS



# Where is data being held?

- ✓ A mixture of paper & digital
- ✓ A collection of unlinked & wieldy spreadsheets
- ✓ An assortment of digital tools with underlying databases:
  - ✓ Forms (MS Forms, Survey Monkey, Jot Form etc)
  - ✓ Mailings (Mailchimp, Events)
  - ✓ Events (Eventbrite, Meet up, Ticket Tailor, TicketSource etc)
  - ✓ Communication & sharing (Teams, Slack, Zoom)
- ✓ Databases
  - ✓ Off the shelf
  - ✓ Custom solution (built by external professionals)
  - ✓ Custom solution (built in house)



# Where charities find themselves

- ✓ Data stored in multiple different places
- ✓ Systems not fulfilling requirements
- ✓ Time consuming often manual processes to link things up
- ✓ Lack of data security & integrity
- ✓ Outdated infrastructure e.g. old computers, slow networks, mobile unfriendly
- ✓ Not enough knowledge in house to fix current systems or find an alternative solution

*“We are still entering everything into the Excel spreadsheet once a month. It takes a long time.....There must be a simpler way.”*

---



# Stick or Twist

## Stick

- Staff/vols already familiar with how to use it
- Worries over staff/vols desire & aptitude for change
- Uncertainty over where to start the process
- Lack of confidence in picking the right solution
- Time & cost of moving to a new system

## Twist

- No longer fit for purpose
- No in-house knowledge to fix existing system
- Staff/vols have lost confidence in it as a solution
- Old system sitting on (nearly) obsolete tech
- New leadership driving change



# Some of the blockers

- ✓ Tech Infrastructure
- ✓ Staff skills
- ✓ Bewildering range of products available
- ✓ Fast changing tech landscape
- ✓ Organisational resistance
- ✓ Lack of leadership recognition
- ✓ Time and juggling other priorities
- ✓ Financial resources
- ✓ No one to lead on the project



# Our long term goal

To ensure small charities have the right systems backed by strong, capable teams using data to deliver better service, demonstrate their impact and advocate for change.

## And today's goal

- ✓ Start identifying solutions which will remove some of the blockers
- ✓ Recruit you to join us in moving these conversations forward within our sector & to co-design solutions which work



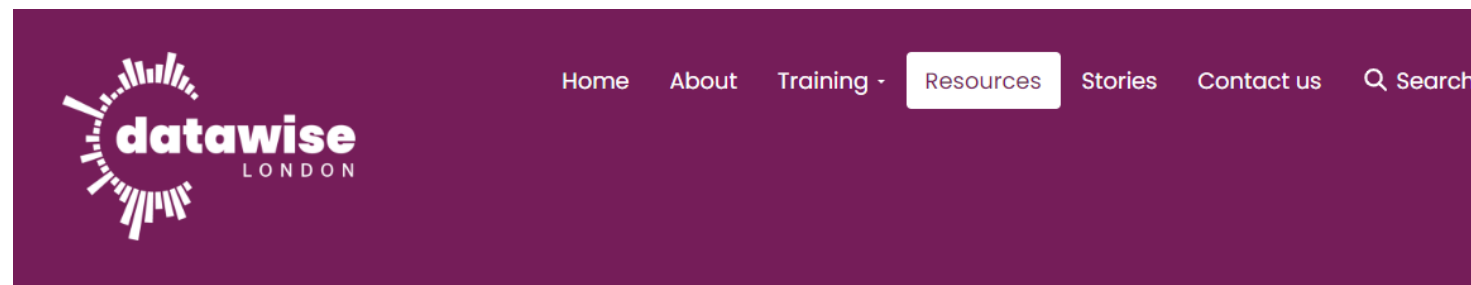
Here's what help is already out there  
along with ideas from our workshop on  
how to improve it.....



# Bringing together resources

On our Datawise London site we create and publish resources on all things to do with data

**Workshop update:** One of the great suggestions made by the group was to create a space where everyone could pin their resources so that we have one place for people to go and get help



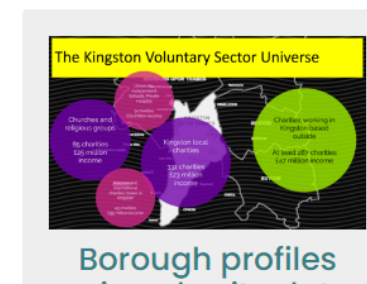
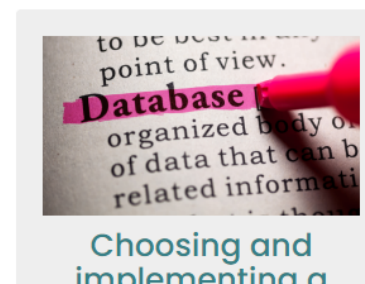
## Resources

Step-by-step instructions for working with data, factsheets, useful datasets and blogs

You'll find useful step-by-step instructions for working with data, factsheets and useful data sources here in our resources section.

To stay up to date with the latest updates [sign up for our e-news](#) or [read previous editions](#).

See also [our list of useful external datasets](#).





# Guiding through the process

## Superhighways' database process & toolkit

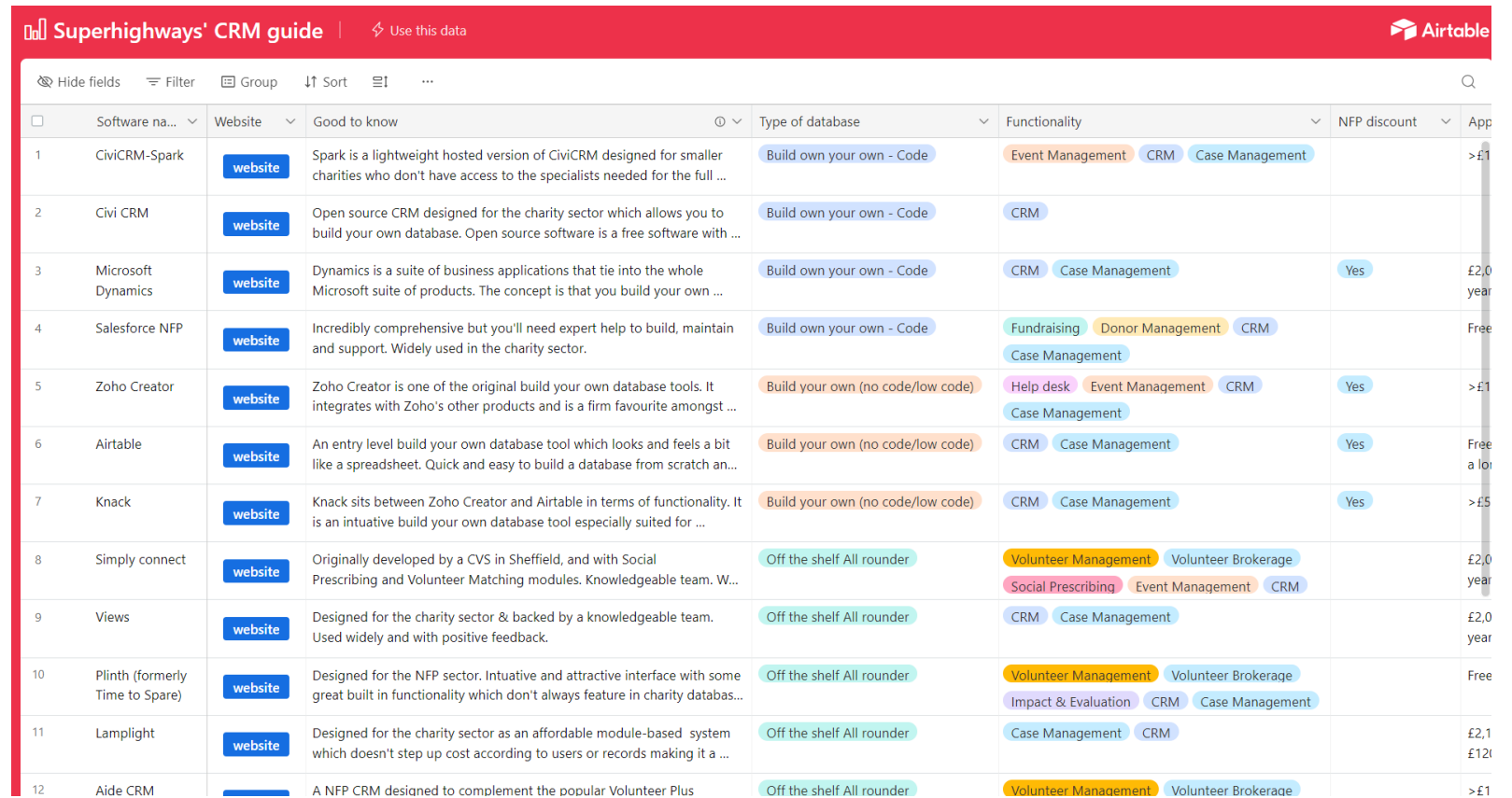
50% of work		10% of work		40% of work		
1. Scope	2. Plan	3. Specify	4. Select	5. Prepare	6. Test & train	7. Implement
Taking stock - what have we currently got?	How are we going to approach it?	What do we need the database to do?	Which database should we choose?	Get everything ready	Put it to the <u>test</u>	Use it everyday
Time & budget	Appoint Project lead	Mapping data to outcomes	Explore database options	Database customisation	Testing & fine tuning	Full roll-out
Attitude towards change	Timeline	Reporting needs	Map how the new database will fit in with your current systems	Data clean up and migration	User training	Ongoing user support
Technical skills	Staff & Volunteer buy-in	User requirements		User materials		Database maintenance
Data stakeholders				New working processes		Continuous improvement
Software & equipment audit						
Outcome & evaluation framework						

# Identifying and guiding on options

At Superhighways we maintain a database of digital & data tools which we publish for specific areas such as CRMs

## Superhighways' CRM guide

**Workshop update:** A great new initiative suggested in our workshop was to create a proforma with standard questions around functionality & get the providers to input their own information on their system to give charities looking for a CRM a first stop for consolidated and standardised information on all possible options.



The screenshot shows the Airtable interface for the 'Superhighways' CRM guide. The table lists 12 CRM options with columns for Software name, Website, Good to know, Type of database, Functionality, NFP discount, and App. The data is as follows:

Software name	Website	Good to know	Type of database	Functionality	NFP discount	App
1 CiviCRM-Spark	website	Spark is a lightweight hosted version of CiviCRM designed for smaller charities who don't have access to the specialists needed for the full ...	Build own your own - Code	Event Management CRM Case Management		>£1
2 Civi CRM	website	Open source CRM designed for the charity sector which allows you to build your own database. Open source software is a free software with ...	Build own your own - Code	CRM		
3 Microsoft Dynamics	website	Dynamics is a suite of business applications that tie into the whole Microsoft suite of products. The concept is that you build your own ...	Build own your own - Code	CRM Case Management	Yes	£2,0 year
4 Salesforce NFP	website	Incredibly comprehensive but you'll need expert help to build, maintain and support. Widely used in the charity sector.	Build own your own - Code	Fundraising Donor Management CRM Case Management		Free
5 Zoho Creator	website	Zoho Creator is one of the original build your own database tools. It integrates with Zoho's other products and is a firm favourite amongst ...	Build your own (no code/low code)	Help desk Event Management CRM Case Management	Yes	>£1
6 Airtable	website	An entry level build your own database tool which looks and feels a bit like a spreadsheet. Quick and easy to build a database from scratch an...	Build your own (no code/low code)	CRM Case Management	Yes	Free a lo
7 Knack	website	Knack sits between Zoho Creator and Airtable in terms of functionality. It is an intuitive build your own database tool especially suited for ...	Build your own (no code/low code)	CRM Case Management	Yes	>£5
8 Simply connect	website	Originally developed by a CVS in Sheffield, and with Social Prescribing and Volunteer Matching modules. Knowledgeable team. W...	Off the shelf All rounder	Volunteer Management Volunteer Brokerage Social Prescribing Event Management CRM		£2,0 year
9 Views	website	Designed for the charity sector & backed by a knowledgeable team. Used widely and with positive feedback.	Off the shelf All rounder	CRM Case Management		£2,0 year
10 Plinth (formerly Time to Spare)	website	Designed for the NFP sector. Intuitive and attractive interface with some great built in functionality which don't always feature in charity databas...	Off the shelf All rounder	Volunteer Management Volunteer Brokerage Impact & Evaluation CRM Case Management		Free
11 Lamplight	website	Designed for the charity sector as an affordable module-based system which doesn't step up cost according to users or records making it a ...	Off the shelf All rounder	Case Management CRM		£2,1 £12k
12 Aide CRM	website	A NFP CRM designed to complement the popular Volunteer Plus	Off the shelf All rounder	Volunteer Management Volunteer Brokerage		>£1



# Build your own database mentoring programme

As part of Datawise London, Superhighways have been doing an exploration into whether DIY or low code/no code tools could be introduced as viable alternatives for small charities needing affordable, dynamic and in house managed solutions

4 tools

**knack\***

8 charities

  
**Airtable**

 **make**

 **zapier**

*You need capacity and a certain level of competence but the geek in me enjoyed the process, and it helps you to make your procedures more efficient and systematic.*



# Superhighways user groups

Opportunities for frontline and infrastructure charities to learn from each other & become collective voices raising issues & ideas around data use / support to influence new practice



**CVS  
Development  
Network**

*Joining the user group was really helpful to see everything that Airtable can do, and to see people run their entire organisations from Airtable and setting up endless automations like sending out welcome emails when people sign up to integrating their database with Google Maps.*



# Other initiatives to help charities with CRMs



Makerble offers a free impact focussed [CRM package](#) for small charities



Plinth (formerly Time to Spare) have launched a new free & open to all [community impact platform](#) which connects data from different sources (such as the Charity Commission & 360 giving) with data from organisations using the [Plinth platform](#) for case management.



Offers help and advice to organisations in their network around data and databases. Such as their brilliant [learning log template](#)



# Other initiatives to help charities with CRMs



The Clothworkers foundation is offering Digital Infrastructure capital funding for charities to help them overcome their challenges around data

## Tom & Tom Free CRM

Tom & Tom have published a [free template](#) for a charity CRM built using Airtable (a great no code/low code build your own database solution)



Catalyst and the associated Data Collective publish lots of useful blogs and [resources](#) on managing data, use & analysis of data from organisations active in the sector



This is just a small selection, please let us know if you know of any others to include and share with everyone.



# Brainstorming ideas in the workshop

## Blockers

Tech Infrastructure

Staff skills

Too much choice

Financial resources

Lack of leadership recognition

Fast changing tech landscape

Organisational resistance

No one to lead

Time & priorities

Fear of change

Overview of systems that exist, who is using what and feedback on experience of using the systems

Standardise use cases? e.g. event registration, case work, impact measurement

Clear from the outset on the purpose of the CRM and what it needs to deliver

Consider enabling reviews where charities can share their experiences of the platform against each criteria

Learning

log <https://adviceuk.my.salesforce.com/sfc/p/4J000000GjGg/a/8d0000000Ychs/dETI6phyIIMSMjxZ72cq6TLXOvFnPXTO2zqh7JV.7qo>

Importance of maintaining a change log - both what you ask from the provider & when & the customized changes you make to the system

## How can we help charities around these

Use post it notes to share your ideas with how we can help - don't just pick the ones you think are viable, go crazy and think big too!

**Blocker:** Too much choice

**Specific Problem:** which CRM to choose?

**Idea:**

- Comparison of CRMs by Use Case e.g.
  - Capturing attendance,
  - segmenting attendance by gender
  - calculating how representative your attendees are of the local population

Madeleine: quantifying the time spent on data by staff across the org

**Problem** - charities don't know what level of detail to go into when defining their requirements

**Solution:**

to help articulate your Use Case - funding an IT Consultant to support the charity through the CRM procurement process could help.

Better knowledge of who using what - how we can better share experiences, learning. Perhaps tech providers coordinate forums

Dalibor: share some of the common pitfalls that you could fall into when using or customising your CRM. For example, if you add 20 new fields a week and want to link them all together, that might cause a problem...

Dalibor: CRM management best practice e.g. encouraging organisations to keep a log of (1) their contact with suppliers, (2) the changes they've made to their CRM

Get a data person involved in choosing your CRM (data design: collection, analysis, reporting). Think about types of data (profile, track support, change over time/journey)

Whole person whole community approach - importance of incorporating understanding what it feels like from users perspective, how can users shape the design and development of the system, how does having their data captured & utilized benefit / help them?

Data is not a bolt on!

Platform agnostic resources - what's important at key points in the journey, what are some of the common issues & how might you address them

**Blocker:** No one to lead

**Specific Problem:** Everyone is at Capacity and no one can take it on?

**Idea:**

- Go off the model of the current team structure
- Can be framed as something that will help make their role easier and not an additional burden

Toolkit - questions to ask staff teams before you choose a CRM, and decide collaboratively. e.g. interoperability/talking to other tools like PowerBI, eventbrite

Tips: teamsport to choose a CRM

Clear & consistent terminology, concepts, issues

Catalyst has useful resources

# Next steps

We are going to set up a working group to think of feasible ways we might work together to help charities through their CRM journey. And hoping to get stakeholders from across the board involved funders, infrastructure organisations, data support providers, and of course the charities themselves. In the workshop we identified a couple of ideas we want to kick off with:

- ✓ **To help guide charities through the morass of information.....**

Bring together all resources around databases into one space

- ✓ **To help create a way of evaluating the huge number of different solutions....**

Create a questionnaire for database providers to complete & collate the results in an online database everyone can access to search for a database

- ✓ **To help make people aware of the options and reduce time spent on looking at different systems...**

Hold online workshops where database providers show a demo of how their product works (standardising what they are showing so like on like comparisons can be made

Everyone in our workshop was keen to join but we'd love more people to get involved so please do get in touch with [alicelinell@superhighways.org.uk](mailto:alicelinell@superhighways.org.uk) if you'd like to find out more or if you'd like to throw more ideas into the pot.

