How to choose the right CRM or database

Impact Aloud 2020

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This session

- 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
- Resources

How do you currently deal with data?

- 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 when thinking about 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 database?

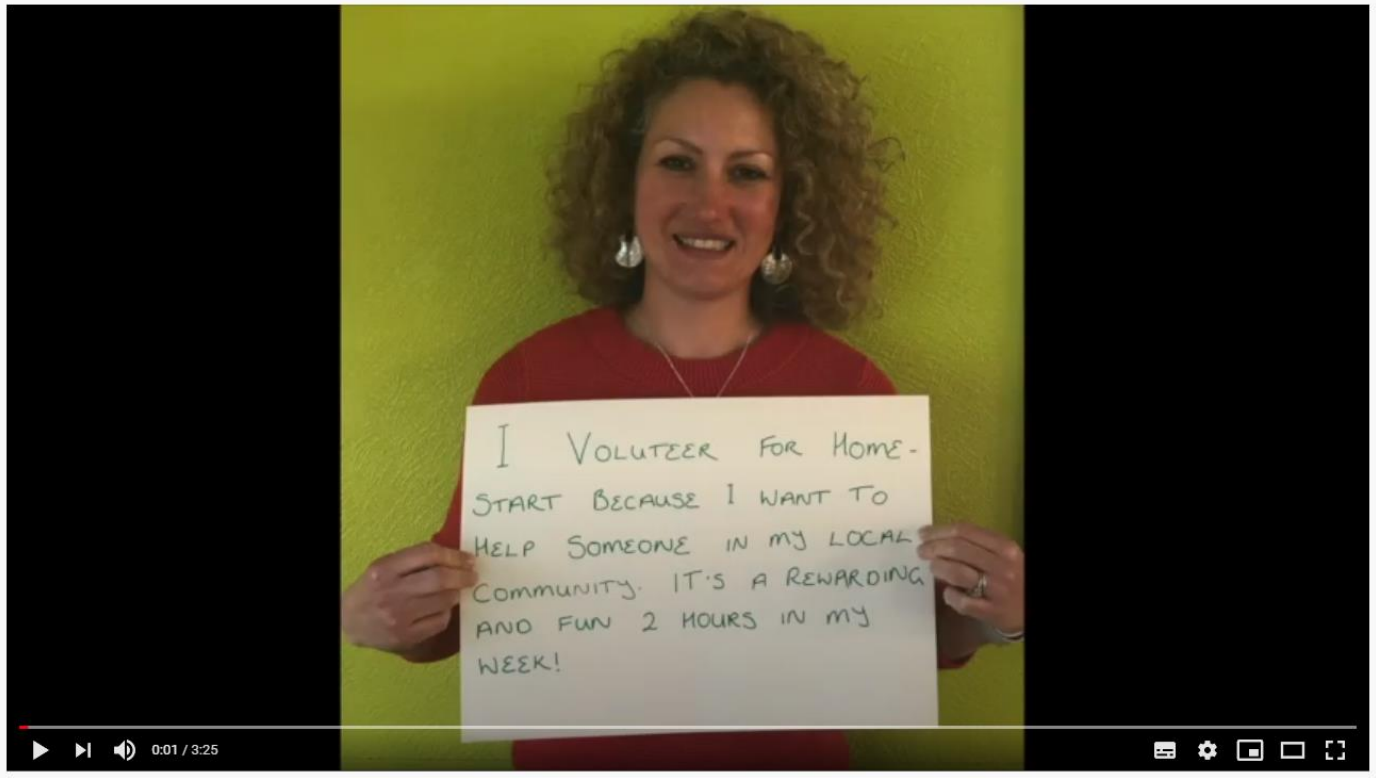
- Orgs want most help with capturing data on their service users and the impact of their programmes.
- Core database = case management system
- Some systems offer additional modules to manage other groups of people e.g. members, donors, volunteers, partners,

The people you work with

How they engage with you

The impact of that

Resources



https://www.youtube.com/watch?v=6ge64_xN7-g&feature=youtu.be

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

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•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?

2. Plan

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- 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

3. Specify

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

- ‘Must have’s vs ‘nice ifs’
- 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
- Sketch out who needs what data, for what purposes (user profiles & data uses)

User profiles

They follow the following structure:

"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 customer?

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

User profiles: Functional requirements

Laura is frontline staff 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.

4. Select / develop

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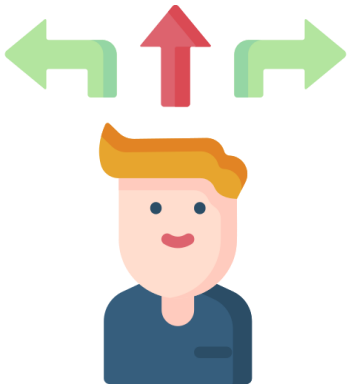
- Explore choices:
- Off-the-shelf
- Build your own



- You're 60% of the way through!
- We're researching the some of the best options
- Follow us for upcoming publications and toolkits
- Snapshot Matrix

Product	Pros	Cons
The big players		
Microsoft Dynamics 365 Salesforce NFP 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. Will require paid-for support if you don't have the skills in-house.
Build your own - (no code/low code)		
Zoho Creator Knack 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. Building something from scratch when something already exists that will fulfil 80% of your needs.
Off the shelf All rounder - Customise & configure		
Simply Connect Lamplight Views Charity Log Better Impact	Great understanding of the charity sector - will feel well understood when describing your needs. 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. Greater upfront cost to these systems – not necessarily negative.
Off the shelf Impact focussed - Customise & configure		
Upshot Impact Tracker Time to Spare TP Tracker 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 Impactasaurus	Simple, well-evidenced tools to measure distance travelled outcomes.	Not designed to act as a CRM solution.

5. Prepare

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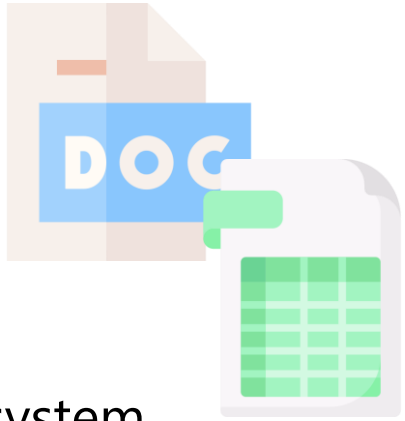
- Current data consolidation
- Customisation
- Migration
- User materials



- Your first 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

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- 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

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- 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!

Resources

Templates:

- Systems audit
- Stakeholder mapping
- Theory of change
- Measurement & evaluation framework
- User stories / profiles

Our process and database research will be published soon

Get in touch if you would like to get involved with our case studies – stories of database successes & … non-successes!