5 TIPS:

HOW TO PREPARE FOR A CRM SYSTEM IMPLEMENTATION FOR YOUR NONPROFIT

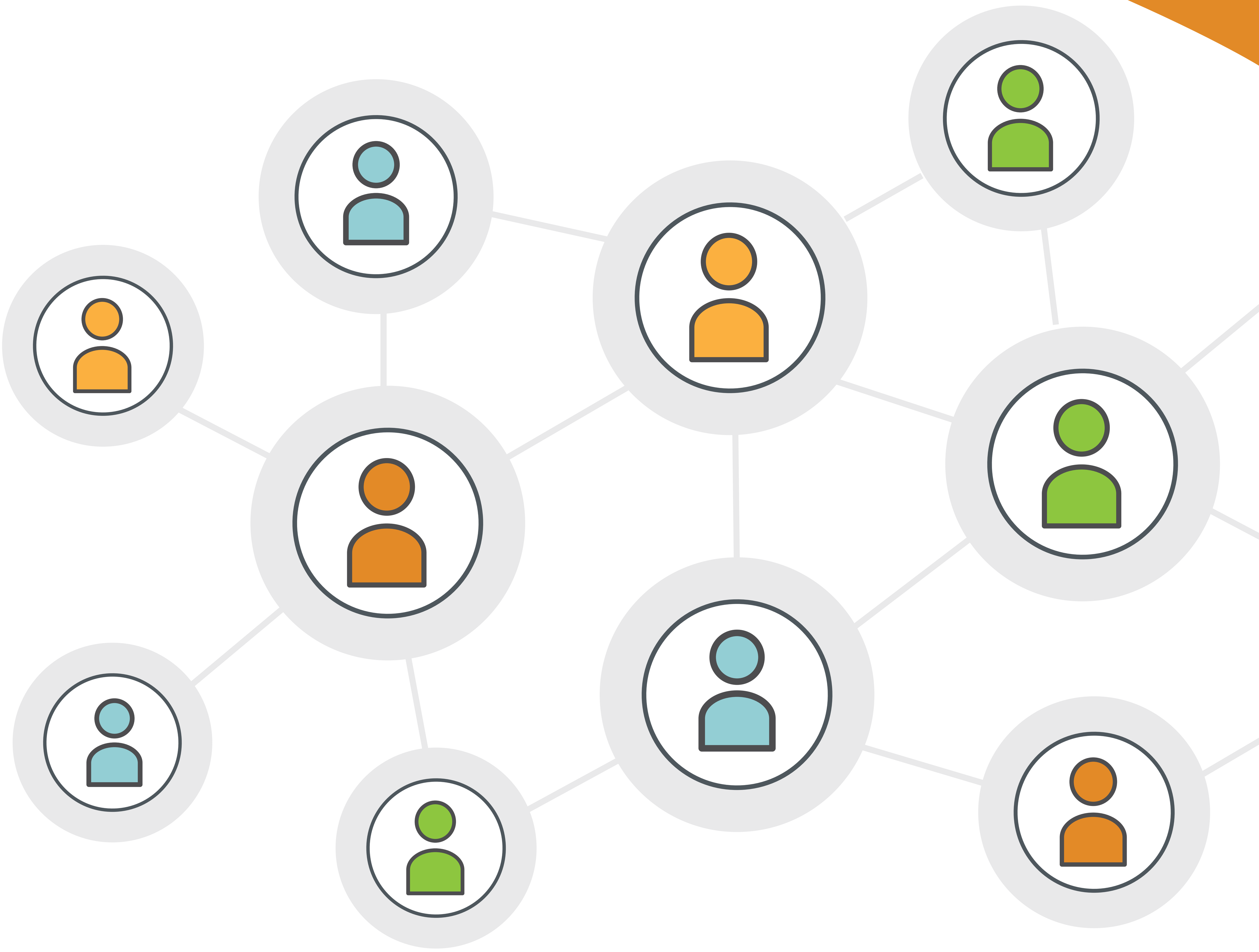
Cathexis PARTNERS

So, you've decided to implement a Constituent Relationship Management (CRM) system to track and manage your nonprofit's relationships with donors, volunteers, advocates, and other supporters. No matter which CRM system you've selected, these five tips will help ensure your project runs smoothly and stays on track:

1 IDENTIFY YOUR TEAM

Your project will impact people across your organization, so it will help to have multiple people involved. Each person may serve in one or more roles. Although each project is different, here are some examples of the types of roles you may need to fill:

- **Project Lead** — Main point of contact and "owner" of the project
- **Subject Matter Experts** — Provide information about their respective departments, and may serve as users of the new system
- **System Users** — Learn how to use the new system
- **Database Administrator** — Manages data prep and clean-up
- **Finance Representative** — Provides guidance on items such as fees, offline gifts, and tax deductible amounts and how they should all map to your organization's General Ledger (GL)



2 START DISCUSSIONS WITH YOUR TEAM

Talk with the people at your organization who make up the project team. Let them know what role they'll be filling, and let them know that the project is getting started. Ask each team member to provide a list of questions and a list of any of the organization's special circumstances that need to be considered.

Collect all standard operating procedure documents that pertain to constituent engagement, constituent data, and transactional data. If these documents don't exist, create them.

Also, consider scheduling regular check-in meetings with key stakeholders to ensure items are being completed on time, or to review any questions or concerns.

Look for alternative ideas and opinions during this phase, because they are there! Now is the time to get all the cards on the table and work through any dissenting opinions and perspectives. Waiting to address disagreements and misaligned expectations until after the project is underway may cost you embarrassment, time, and money down the road.

3 CLEAN UP YOUR DATA

It is best to import only “clean” data into the new environment. Here are a few tips:

- Check in with all staff members to ensure you know where all data resides. Be sure to ask if staff members are capturing and maintaining data in areas such as spreadsheets, email inboxes, Access databases, online tools, etc.
- If possible, migrate all data into your current database of record. More than likely, though, your current database can’t support all of the different points of data — that is one of the reasons you are migrating to another system. If there are different data points (email, volunteer, events, peer-to-peer, grants management, etc.), then create a simple data flow chart to show how records currently interact. Where possible, create a unique ID that links contact records across different platforms.
- Perform data clean-up, including deduplication and house file maintenance.

4 LEARN MORE ABOUT YOUR NEW SYSTEM

Take some time to identify and review information about your new system:

- **Watch a demo** — If your CRM vendor offers a demo, be sure to watch it. It will give you context and a head-start on understanding your new system.
- **Study training and documentation materials** — Your new CRM system likely includes training and documentation to help you learn more about how it works. Be sure to ask your CRM vendor what resources are available, and then set aside time to study the resources.
- **Review product resources** — CRM system vendors often provide additional resources such as best practices articles and online communities to help you learn more about how to use your product and connect with others who are using the product. Ask your CRM vendor about these types of resources, and then set aside time each week to review them.

5

KEEP YOUR TEAM UPDATED

Let your team know what's happening, and when their help will be needed. This will keep them involved and help ensure there are no surprises as your project progresses.

Provide opportunities and a process for those involved to see progress and provide feedback along the way by having a shared project plan and a means to submit questions and feedback. Consider using tools like Basecamp, shared Google sites or Google drive folders, and intranets to facilitate this collaboration.

ABOUT CATHEXIS PARTNERS

Cathexis Partners has helped 700+ nonprofits set up and use technology to raise funds and spread the word about their mission affordably and effectively. We are a certified Blackbaud Solution Provider and a Salesforce Foundation Registered Partner. We also work extensively with WordPress and many technologies that enhance and expand CRM and CMS technologies for nonprofits to give our clients the solution that meets their specific needs.

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