



Charities Consortium IT Directors' Group

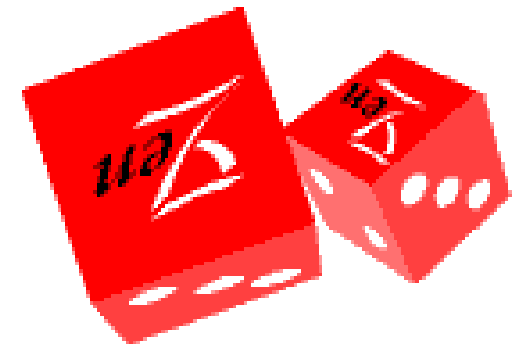
“Zest for Enlightenment”

Reviewing Relationship Management Solutions for the Not-for-profit Sector

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Agenda

- Introduction
- Understanding different relationships
- Managing relationship issues
- Options for developing relationships
- IT opportunities for charities
- Developing effective governance for CRM
- Actions for IT Directors
- Thoughts for the day...





Introduction to Z/Yen

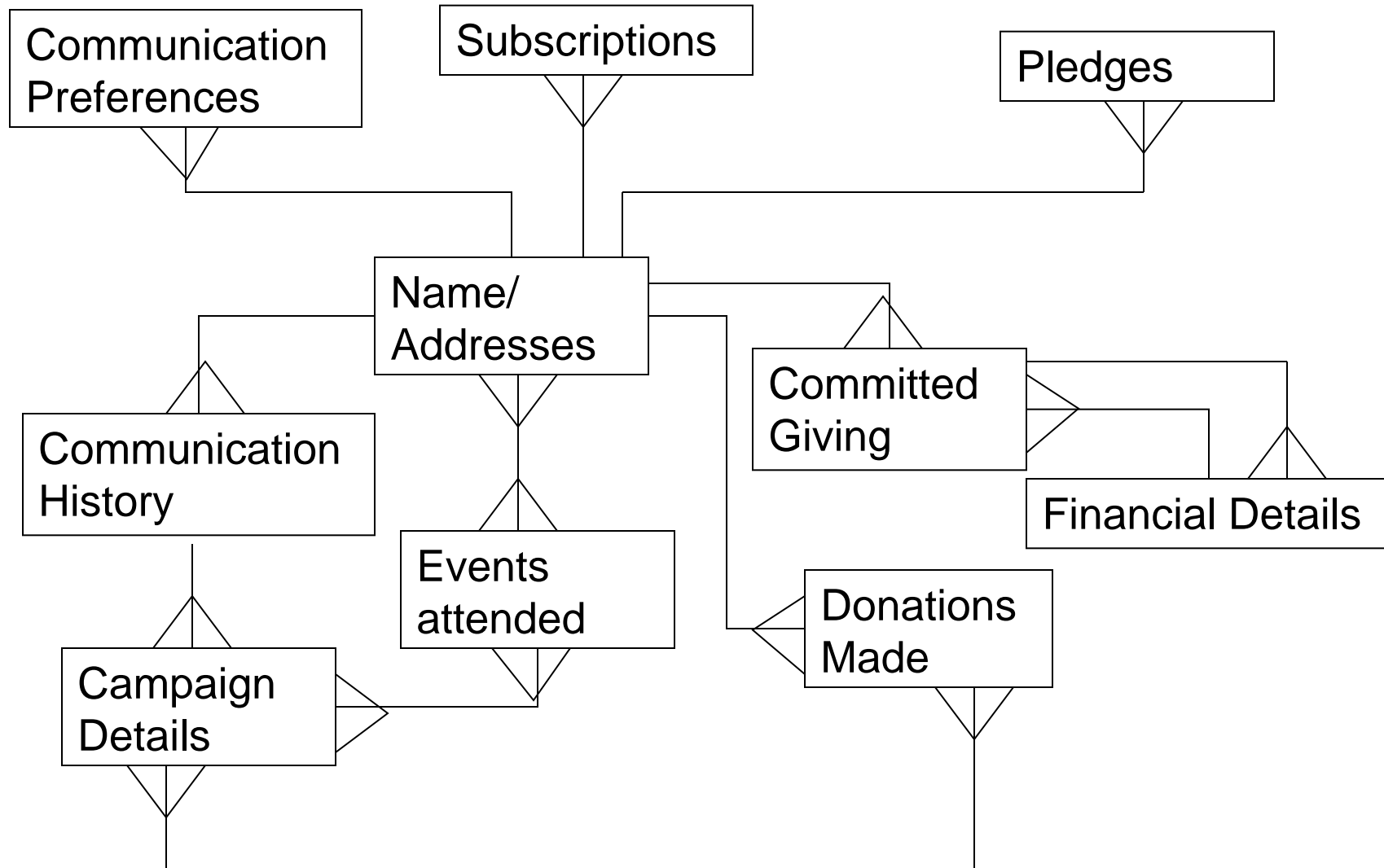
- UK's leading risk/reward management firm
- Most experience in: not-for-profit, technology, finance and business-to-business services
- Clients such as Barnardo's, Cancer Research UK, British Red Cross, The British Heart Foundation, BEN, Marine Stewardship Council, The Children's Society, Rethink, Action for Blind People, UNISON
- Projects in strategy, intelligence, fundraising, governance, risk management, finance, IT
- CCITDG Benchmarking Study 2002/3

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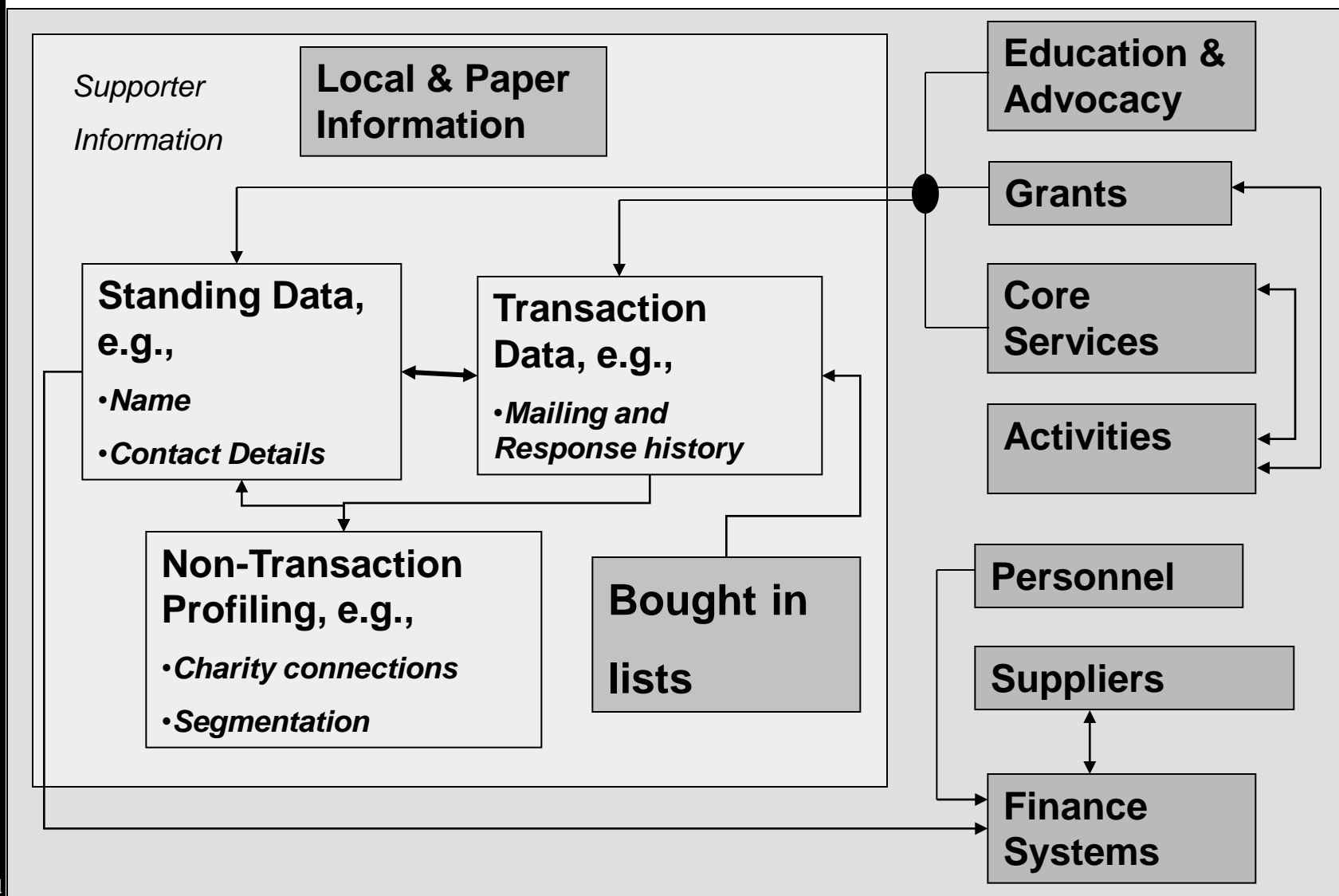


Charity-Stakeholder Relationships are Complex





Many locations of stakeholder data





From Customer to Stakeholder to Community ...

- **Customer Relationship Management** aims to identify, attract and increase the retention of profitable customers. It works best when it is part of an overall customer focused strategy...
- **Stakeholder Relationship Management**, aims to manage all interactions with stakeholders in order to identify, attract and increase the retention of *committed* stakeholders. It works best when it is part of an overall stakeholder focused strategy...





From Customer to Stakeholder to Community Relationships...

- A community has...
 - Common history and purpose
 - Shared knowledge and culture
 - Common practices
 - Co-location in space and time
 - Common action
 - Co-created future





What's good about electronic communities for charities?

- a single central point of contact to benefit from economies of scale over the many disparate contact points often in use;
- one time only data capture to improve efficiency, to enhance quality of data and to enable consistent trapping of a supporter's relationship with you;
- additional opportunities for cross-functional campaigns (e.g. education, awareness, fundraising, volunteering, event participation etc.);
- having the ability to target a large community could make your charity more attractive to corporate donors and potential commercial partners;
- easier to offer central services to supporters, e.g., Christmas Gifts.





Community Relationship Issues

- **Data Quality** – individual silos, inconsistent content and format
- **Data Ownership** – different divisions holding on to “their” supporters
- **Technical Risks** – unwillingness to invest in perceived “big technology” projects
- **Stakeholder strategies** – lack of consistent approach to stakeholder relationships





Strategic Community Approach

- Understand variety and multiplicity of your stakeholder relationships, with staff, volunteers, members, committed givers, major donors, events participants, event organisers etc etc
- Define how they would like to relate to and with you
- Develop consistent approaches that work for whole organisation
- Ensure your reward strategy adapts to new ways of working





Options for Community Building

- **Big Bang** – buy or build one big system by yourself e.g., Siebel, Peoplesoft, Oracle
- **Shared risks** – work with a partner to develop custom system for your organisation, “What is your current system capable of?”
- **Rent an application** – by user or by volume of activity, salesforce.com
- **Step by Step** – bring your data together in incremental stages, e.g., share data through links and/or data warehouses

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Plan what you want to achieve for YOU



Opportunities for Charities

- Customisation of current tools:
Maximiser/Outlook/Goldmine
- Web Services, On Line Analytical
Processing/Data Warehouses
- Middleware applications
- On Line Communities and Resources for
stakeholders, information (e.g. 1StopHit) ,
'blogs etc
- Analysing patterns and responses (e.g.
PropheZy)





What can CRM Systems do?

Requirement	Outlook	Maximiser	Siebel
Manage different categories of enquiries and people	Yes, with configuration	Yes, with configuration	Yes
Configurable Table of options for key fields	Yes	Yes	Yes
Highlight actions and due dates	Yes, using tasks	Yes, with action planner and hotlists	Yes
Refer actions and enquirers to other contacts	Yes	Yes, using email	Yes
Record and update status of applications/contacts	Yes	Yes	Yes
Link to relevant documentation	Yes, with journals	Yes,	Yes
Maintain contact numbers and addresses	Yes	Yes	Yes
Maintain history of relationship with your organisation	Yes	Yes	Yes
Link related contacts to each other	Yes	Yes	Yes
Generate different types of standard correspondence	Yes	Yes	Yes
Flexible searching	Yes,	Yes	Yes
Flag public communications	Yes	Yes	Yes
Accessibility and security	Yes	Yes	Yes
Ability to export information to other parts of charity, e.g., via Excel	Yes	Yes	Yes
Remote access across the organisation	Yes	Yes	Yes





Things to think about..

- Gartner Research: more than half of CRM implementations failed to achieve business benefits
- Gartner: 75% of CRM projects that fail through 2004 will do so because of poor business decision-making



Web Services

- Web Services: Software that is available over the Internet and uses a standardised XML messaging system
- Universal Description, Discovery and Integration (UDDI): A Phone book of web services
- SOAP: How to make the call
- XML: The conversation





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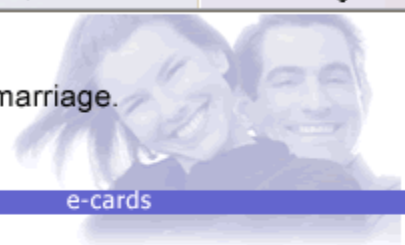
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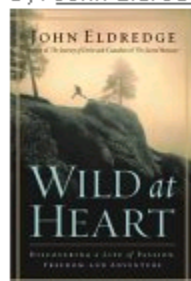
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Community Resources

- News and information, e.g., experts forums, targeted news feeds (1stophit)
- Community activism, e.g., Oxfam campaigns, Stop the War
- Community partners, e.g, financial savings products





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Integrating Services and Applications through Middleware

- Enterprise Application Integration: Integrates many different processes, applications and systems
- Separate applications communicate with a hub server, which automatically routes data to the right place
- J2EE applications becoming mainstream
- Iona, SpiritSoft, BizTalk, See Beyond

"Middleware is the intersection of the stuff that network engineers don't want to do with the stuff that applications developers don't want to do." (www.internet2.edu)





Key Issues

- Assess scalability and performance – need high quality network infrastructure
- Need strong security standards across differing standards
- Choose applications with open infrastructure, compatible with industry standards
- Work with partners to leverage knowledge and experience





Dynamic Analysis and Pattern Recognition - PropheZy

- Excel Add in for predictive modelling
- Analyse stakeholder data and predict future behaviour
- Reinforce stakeholder behaviour patterns
- How it can help charities build communities

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Achieving Success

● When it goes right:

- Collaborative project between functions
- Users participate in decisions & requirements
- Senior management sponsorship
- Common objectives understood
- Approach in “bite-sized chunks”

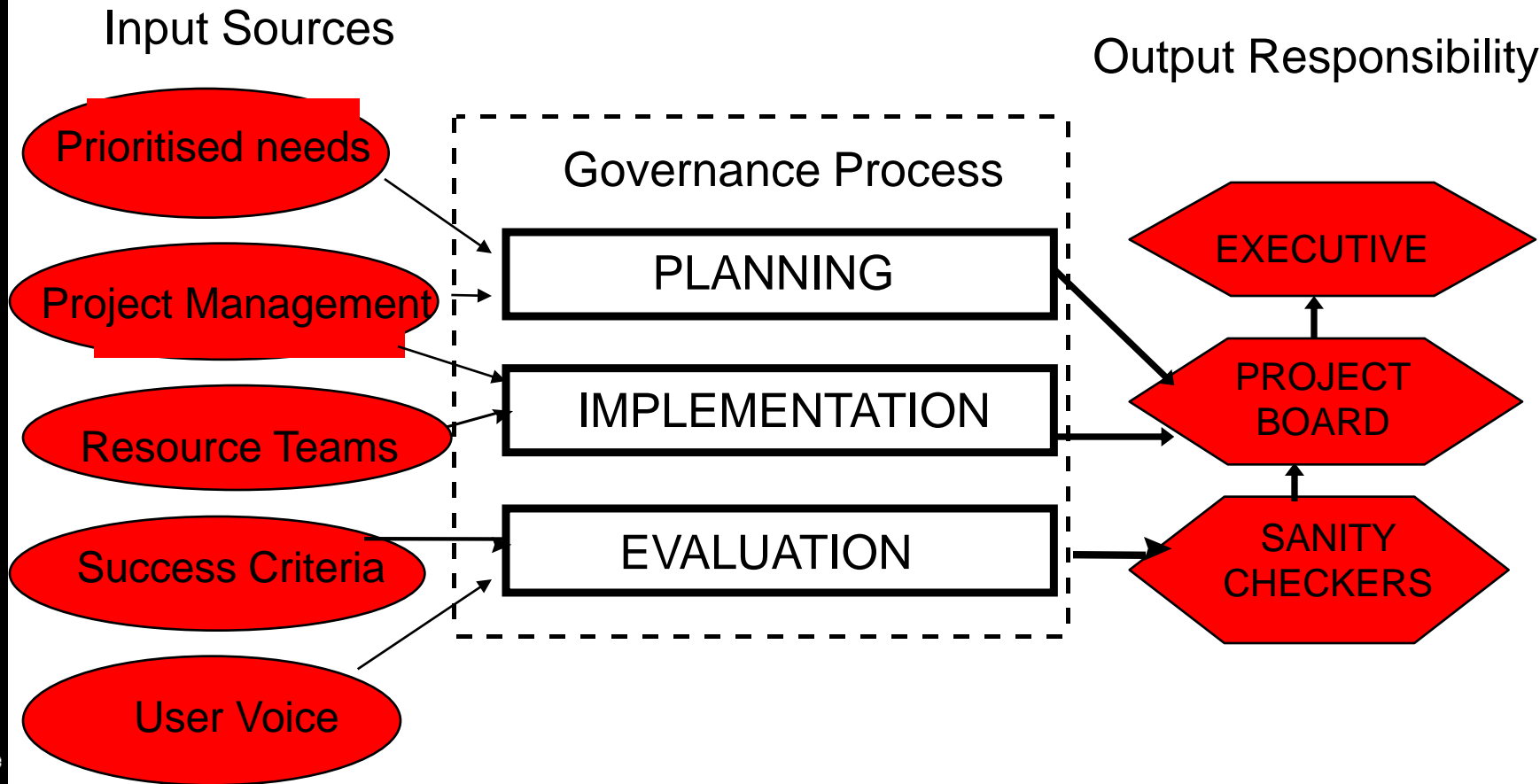
● When it goes wrong:

- One function “hogs” the project
- Users not involved in requirements/decisions
- Limited management commitment
- Benefits and objectives are unclear/unshared
- “Big Bang” approach





Governance Process for (e.g.) CRM





Actions for IT Directors

- Work across the organisation – build your internal relationships
- Work with your peers – benefits of sharing development and purchasing power
- Consolidate your data sources and data collection
- Avoid the bear traps (organisation specific)





Thoughts for the day...

- How well do you understand your organisation's community information needs now?
- How can you fill in the gaps (improve understanding and meet needs)?
- Who can you partner with to help add value?
- What can you do to minimise risks and maximise rewards?

