

Implementing a CRM

‘Building Digital Capacity’ resources series

 

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| **Resource type:** | **Strategic area:** | **Use it to:** |
| Guidelines + templates |  | * Learn about what a CRM is and its potential benefits for your centre.
* Learn about what’s involved in a CRM project and how to assess your centre’s readiness
 |

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Other relevant resources in our **Building Digital Capacity resources series:**

* *Budgeting for technology spend*
* *Selecting technology vendors and solutions*

1 - OVERVIEW

**What is a CRM?**

**‘Stakeholders’ vs ‘Clients’**

For data privacy reasons, it is critical to distinguish clients (i.e. people who seek or receive legal services) from other stakeholders, as some of the information CLCs hold about clients should not be stored in the CRM system. This includes any data pertaining to the client’s legal status, issues and associated case data. It’s OK to have client information (like their names and address) in your CRM but only for the purpose of non-legal communications, not as part of legal service delivery.

CRM traditionally stands for Customer Relationship Management, though in the non-profit sector, the word ‘Customer’ is sometimes swapped for ‘Constituent’.

Broadly, the idea of ‘customers’ will designate people your CLC has a relationship with for the purpose of communications, marketing, advocacy, funding, policy development, community engagement activities, etc.

For the purpose of clarity, this paper will use these customers as ‘Stakeholders’, and use the term ‘clients’ only to refer to people who seek or receive legal services.

**Who are our stakeholders?**

Hence, the first critical aspect of CRM is to determine who those stakeholders are. For CLCs, this can include a wide range of people who engage, interact and support the centre.

Stakeholders can be individual people (for example an individual donor, or a journalist), or organisations (for example a government agency or a law firm). Often people will be associated to organisations and vice-versa. An individual may belong to an organisation (e.g. a government representative or a contact at a media agency) or not (e.g. a private donor). In some cases, an individual may belong to more than one organisation.

The table overleaf provides an overview of categories of stakeholders and their possible relationship to a CLC. Note that sometimes people will ‘wear more than one hat’, i.e. have multiple types of relationships with the centre (for example, e.g. someone working for a private law firm can be a volunteer/pro-bono resource, as well as a private donor to the centre). This list is a baseline, and you may find some relationship types don’t apply to your CLC, or that there are other types of people/organisations you engage with.

| **Relationship Type** | **Description** |
| --- | --- |
| **PEOPLE** |
| Members | People who are constitutional members of the CLC |
| Donors | People who make a financial gift to the CLC |
| Event attendees | People who attend the CLC’s events (e.g. CLE, local community networking event, fundraisers etc.) |
| Subscribers | People who subscribe to the CLC’s communications such as direct mail and email lists (e.g. campaign lists, newsletters, etc.) |
| Media contacts | People working for media agencies or outlets and engage with the CLC on legal topics (research, articles, news, etc.) |
| Politicians | People who are in a political position or role including MPs and members of political parties |
| Organisation representatives | People who hold a position within an organisation or government agency (see below) and interact with the CLC (e.g. people working in key positions in the Department of Justice and Attorney-General etc.)  |
| Volunteers | People who volunteer for the CLC – this category may be split into different kinds of volunteers (e.g. volunteer solicitors, volunteer administration workers, law/clinic students etc.)  |
| Employees | People who work for the CLC |
| Board and committee members | People who are part of the CLC’s Board and/or Management Committee |
| Other | Anyone else who may have interactions with the CLC |
| **ORGANISATIONS** |
| CLC sector organisations | Other CLCs and peak bodies |
| Other legal service providers | Organisations outside the CLC sector who provide similar or complementary services (e.g. Legal Aid, private law firms) |
| Other community service providers | Organisations outside the CLC sector who provide community services  |
| Government agencies | Government agencies, departments, MP offices, etc. either at local, state or federal level |
| Corporate / pro bono organisations  | Corporate/commercial organisations who have a relationship with a specific CLC (for example for corporate volunteering programs or corporate donations/support) |
| Partners | Organisations that work a CLC under a partnership or alliance model (e.g. for the purpose of an advocacy campaign) |
| Suppliers | Organisations that provide services or goods to a CLC (e.g. tradespersons, landlord/property manager, office supplies businesses, utilities, accountants etc.)  |
| Education | Universities, colleges and schools |
| Private funders | Institutions and funding organisations/grant bodies  |
| Media agencies | Media agencies or outlets, either at local, state or national level |
| Other organisations | Any other organisation who may have interactions with the CLC |

**Key benefits of a CRM for community legal centres**

A CRM can provide CLCs with a reliable, effective way of managing stakeholder information and relationships, and support associated engagement processes such as communications, events, volunteer management, advocacy campaigning, and fundraising. Key benefits associated with a CRM for CLCs include:

| **Benefits** | **How…** |
| --- | --- |
| ü Productivity improvements & time **efficiencies** | All CLC contacts are in one place, hence there is no need to spend time managing and keeping lists up to date, or looking for information in different places. Stakeholders can be quickly communicated with, and the history of their contact with the CLC is stored and easily accessible in a central database, avoiding the need to search through email boxes and paper files. |
|  ü Greater and more **targeted engagement** with the community for communications and advocacy purposes | Stakeholder information in a CRM can be enriched beyond simple contact data (such as address and email) to encompass information including relationship type, areas of interest, roles in the community, etc. This provides a powerful basis for CLCs to initiate and target specific people for communications and advocacy activities.  |
| ü More effective management of **volunteers** | All volunteer information is stored in one place, and there is easy access to the volunteer profile and history. CLCs are able to search through their volunteer base, efficiently track their skills and experience, available days / hours, practising certificate etc. This allows the CLC to build long-term relationships with volunteers (beyond their volunteering time at the CLC). |
| ü Increase in **fundraising** and donations | For centres who have fundraising programs, a CRM allows CLCs to track their donors (actual or prospective, individuals or organisations) together with their donation history, to generate ongoing long-term support, engage with donors in specific fundraising activities, and support grants applications. |
| ü Improved **reporting** and decision-making | A CRM allows a CLC to track in one place its activities, impact and performance in areas that complement service delivery (e.g. number of community engagement / CLE activities, amount fundraised, volunteer hours, advocacy campaigns supported, etc.). |
| ü Increased **knowledge retention** and transfer | Moving away from individual lists of contacts sitting in staff email inboxes or spreadsheets to a centrally managed and fit-for-purpose system will mitigate the risk of information loss when staff members leave the CLC, and thus promote knowledge retention / management and knowledge transfer. |

2 - UNDERTAKING A CRM PROJECT

In theory, every CLC can benefit from a CRM, but in practice, introducing another system requires time, effort and money, and your CLC will only see benefits if the CRM is:

* a fit-for-purpose tool / program that is able to meet your CLC’s needs;
* well implemented and staff are properly trained to use it effectively;
* well-used by your teams and the stakeholder data is kept up-to-date.

**Refer to the checklist in Part 3** of this paper to review some initial questions you should consider before deciding if a CRM is right for your centre.

 **Setting your project objectives**

If your centre is considering undertaking a CRM project, it’s important to be clear about what your objectives are so that you can plan and prioritise accordingly. The first step is to clarify the benefits your centre will get from a CRM and to develop specific goals for your project. These may include:

* consolidate contacts and associated information in a central, easy to access, single source of truth;
* build and nurture relationships with stakeholders, and increase support for your centre;
* provide secure mechanisms and tools for storing and accessing stakeholder data, and promote knowledge sharing within your centre;
* increase your reach and strengthen your centre’s position and role in providing legal services to vulnerable people;
* achieve cost savings and productivity gains;
* upskill your centre’s users and provide ongoing support and training to optimise technology adoption.

**Scoping out your project**

Before you start looking at solutions, it is also important to establish your current situation and define business requirements. This will help you understand the baseline you are working form, set priorities, and communicate to vendors about what you need from the solution so you can evaluate your options.

Your starting point should be an audit of your current stakeholder management system (which is likely be a combination of technology and manual processes) to establish what is currently in use for your centre, where stakeholder data is stored (e.g. Excel spreadsheet, email inboxes, mass emailing tools, etc.) and what type of information about contacts is currently available.

Once you have a good take on what is currently used in your centre, you will need to define your business requirements. CRM software typically come with extensive functionality sets and can be overwhelming, so it’s worth spending the time upfront working out which priority functionalities and features you will need from a CRM solution.

* *See Part 3 of this document for a checklist of core capabilities to help you identify what you need from your CRM system.*

**Selecting a solution**

The market is full of CRM systems and choosing one can be a daunting task.

Whilst it is not possible here to review all available options and identify the solution that will be right for your centre, some examples of possible CRM systems in use in the CLC sector include the following (note the solutions listed below do not constitute a recommendation by CLCQ and are noted for information only):

* Salesforce
* Microsoft Dynamics
* CiviCRM
* HubSpot
* NationBuilder.

**When looking into different solutions, take into account what other systems / software your centre currently uses and what integration you may require with those systems.**

**One CRM system or multiple apps?**

There are broadly two types of CRM on the market:

* solutions based on the **‘one-stop-shop’** concept where the same software provides all functionalities (typically in a modular way);
* solutions based on **‘best-of-breed’** ecosystems where there is a central database which supports core functionalities, but integrates with best-of-breed systems that are added-on for specialist features (e.g. email marketing, event management).

Both options have their pros and cons. The one-stop-shop offers simple all-in-one features under one purchase agreement, whilst the best-of-breed offers more advanced capabilities, but requires you to integrate systems together and buy more than one subscription or license.

For example, many CRM packages offer mass emailing as part of their core modules, but these are usually inferior in usability and functionalities to using a specialist email marketing tool. When weighing up your options, consider what is truly critical to your centre.

For more information on selecting a solution and vendor, refer to the *Selecting technology vendors and solutions* document in our **Building digital capacity resources series**.

**What’s involved in a CRM project**

Cloud-based CRM solutions come with many out-of-the-box functionalities and are likely to require minimal customisation. However, setting up a CRM system, testing it, working through the data structure, defining processes and training end-users will require time and effort.

Unless you have skilled in-house resources, it is strongly recommended to source an implementation partner to help you with the set-up of the system and end-user support and training (note that this may involve an additional cost).

A CRM project will involve:

|  |  |
| --- | --- |
| **Solution scoping and selection** | * Business requirements / scope definition
* Options review and selection (depending on the solution chosen, there may be more than one system to implement.
 |
| **Data migration** | * Audit of current contact information (volumes, types of data, current storage systems)
* Development of data standards and mapping of existing data to target system
* Preparation of existing data
* Migration of data to the CRM, including testing.
 |
| **Business processes and system configuration** | * Definition and implementation of consistent processes and guidelines for managing contacts, relationships and related processes (e.g. donation management, event management, email communications, membership management)
* Set up of CRM (e.g. modules, data fields, user set up, privilege management, etc.)
* Design and configuration of selected functionalities
* Development of policies and procedures.
 |
| **Change management** | * Communications with staff and volunteers
* Involvement of teams in getting data ready for migration
* Training (at go-live and on an ongoing basis, including induction of new team members)
* Training updates / refreshers as new functionalities get introduced.
 |
| **Deployment and support** | * System go-live and support
* Ongoing technical support
* Usage monitoring
* Management of software / system updates and new functionality releases
* Implementation of back-up and restore procedures
* Decommission of legacy systems, if any.
 |

3 - CHECKLISTS

**Can your centre benefit from a CRM?**

Consider the following: if you answer ‘No’ or ‘Not sure’ to most, you should consider implementing a CRM capability.

Be sure however to go through the next checklist to assess how ready your centre is to undertake a CRM project.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Yes** | **No** | **Not sure** |
| 1. Do we have lots of contacts that are important to our CLC with their details up-to-date, stored and accessible in one place?
 | [ ]  | [ ]  | [ ]  |
| 1. Can we easily find all of our contacts and communicate with them on topics that are relevant to them?
 | [ ]  | [ ]  | [ ]  |
| 1. Are we confident we won’t lose information about our contacts and interactions with them if and when our staff leave the centre?
 | [ ]  | [ ]  | [ ]  |
| 1. Do we have efficient ways of tracking and managing our volunteers, and are we good at keeping in touch with them once they’ve left?
 | [ ]  | [ ]  | [ ]  |
| 1. Do we know who our supporters are, and are we able to engage them in our advocacy or fundraising activities (e.g. donate to a campaign, sign a petition, support a submission, etc.)
 | [ ]  | [ ]  | [ ]  |
| 1. Are we able to quickly reach the right people in case of major and unexpected events / news to let them know of important information?
 | [ ]  | [ ]  | [ ]  |
| 1. Can we easily organise events and track people’s participation?
 | [ ]  | [ ]  | [ ]  |
| 1. Do we have reliable, up-to-date communications lists and do we know who we have contacted about what?
 | [ ]  | [ ]  | [ ]  |
| 1. Are our staff members all following the same process to keep track of people they interact with?
 | [ ]  | [ ]  | [ ]  |
| 1. Are we able to efficiently report on all the non-service delivery activities we are doing?
 | [ ]  | [ ]  | [ ]  |

**Is your centre ready for a CRM?**

Consider the following questions: if you answer ‘No’ or ‘Not sure’ to most, you should not proceed with a CRM straight away, and address the gaps before committing your centre to a CRM project / system.

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Yes** | **No** | **Not sure** |
| 1. We understand what a CRM is and how it can benefit our centre
 | [ ]  | [ ]  | [ ]  |
| 1. We have clear objectives for our CRM project with tangible outcomes to look for
 | [ ]  | [ ]  | [ ]  |
| 1. We understand who our stakeholders are, and we are clear about where we will manage their information vs clients
 | [ ]  | [ ]  | [ ]  |
| 1. We have capacity (resources, skills, budget) to undertake a CRM project – if we don’t have these, we are prepared to seek and secure funding
 | [ ]  | [ ]  | [ ]  |
| 1. We understand the activities and challenges involved in implementing a CRM system
 | [ ]  | [ ]  | [ ]  |
| 1. We have talked with other centres and/or comparable organisations who have implemented a CRM
 | [ ]  | [ ]  | [ ]  |
| 1. We have sought input from our future CRM end-users (staff, volunteers) and have addressed their concerns
 | [ ]  | [ ]  | [ ]  |
| 1. We will commit our teams to participate in the CRM project, especially in activities related to data preparation, data quality and training
 | [ ]  | [ ]  | [ ]  |
| 1. We have scoped the main functionalities we require from a CRM and have set priorities
 | [ ]  | [ ]  | [ ]  |
| 1. We are aware of data privacy issues and have included, or are planning to include, requirements to that effect in our scope
 | [ ]  | [ ]  | [ ]  |

**Core CRM capabilities checklist**

The table below provides a list of core business requirements you centre may want to consider when looking for a CRM system. This is not a list of must-haves for all centres, and the list should be used **as a starting point** to identify what you expect from your new system.

This will help you refine your requirements and prioritise your needs: you may find some requirements will not be relevant to your centre, or some may be more important than other, or that you need to reword some requirements to reflect your centre’s specific needs.

You may also find that you have additional requirements not shown here.

| **Requirements** | **Needed?** | **Priority**(critical, important, nice-to-have) |
| --- | --- | --- |
| **Core functionalities** |
| A user-friendly tool, easy to set-up with an intuitive user interface and functionalities | **[ ]**  |  |
| Ability to centrally store, track and manage:* individual contacts and stakeholders, their characteristics, contact details, profile, role, organisations (if applicable);
* entities an individual contact may belong to, their characteristics and profile information (organisations, partners, service providers, etc.)
 | **[ ]**  |  |
| Provide search capability for individual and organisation records, including multi-criteria searches, and support contact de-duplication | **[ ]**  |  |
| Ability to manage volunteers and volunteer lifecycle, including volunteer recruitment/enrolment, volunteer profile management, volunteer activities and jobs, and rostering | **[ ]**  |  |
| Ability to manage stakeholders who make a financial contribution to the centre, either in the form of a donation or membership, and their donation information (donation types, status, history, amounts, etc.) | **[ ]**  |  |
| Management of marketing communications to and from stakeholders (particularly those executed through mass emailing) and management of campaigns targeting specific audiences with calls-to-action, including tracking of campaign results, for advocacy and/or fundraising purposes | **[ ]**  |  |
| Email newsletters and other communications to contacts lists according to each contact’s subscription preferences | **[ ]**  |  |
| Track communications and interactions history (email, correspondence, phone calls, meetings) with stakeholders and support planning / scheduling of those interactions (e.g. reminders to call) | **[ ]**  |  |
| Ability to manage contact preferences, including subscription preferences, opt-ins and opt-outs | **[ ]**  |  |
| Management of events (planning, registration, attendance tracking), paid and free, including community / advocacy events and fundraising events (if applicable) | **[ ]**  |  |
| Analysis of information to support performance tracking and reporting, including queries and dashboards | **[ ]**  |  |
| Segment and target lists of contacts for the purpose of specific marketing or communications campaigns / initiatives (e.g. appeals, committee lists, project or interest-specific lists, Christmas cards lists, etc.) | **[ ]**  |  |
| **Access** |
| Access from anywhere with an internet connection | **[ ]**  |  |
| Access from any operating system (Mac OS or Windows) and compatible with common internet browsers | **[ ]**  |  |
| Access from mobile devices, including smartphones and tablets (dedicated mobile app, not just web browser version) | **[ ]**  |  |
| Ability to sign in with existing email account (e.g. sign in with Google account, sign in with MS account) | **[ ]**  |  |
| Mobile access / mobile app for smart phones and tablets | **[ ]**  |  |
| Accessibility features | **[ ]**  |  |
| **Security** |
| Secure sign in features | **[ ]**  |  |
| Secure storage in Australian locations | **[ ]**  |  |
| Easy-to-use privilege management administration, with ability to set up user groups and roles and restrict access to specific data and functionalities | **[ ]**  |  |
| The system should be [PCI DSS compliant](https://www.pcicomplianceguide.org/pci-faqs-2/) for credit card payments made online (e.g. donations, paid events, etc.) | **[ ]**  |  |
| **Integration** |
| Ability to attach files to a contact or organisational record (e.g. document, letter, media file, certificate, photo, etc.) | **[ ]**  |  |
| Overall the system should support automated and manual integration of data through:* an API (Application Programming Interface) supporting data extracts, imports and exchanges of data with other systems;
* import and export capability for data files
 | **[ ]**  |  |
| The system should have integration capability with email (MS365 or Gmail) and calendaring systems | **[ ]**  |  |
| Ability to integrate with other systems like databases (e.g. existing mass emailing system, file / document management system, CLASS) | **[ ]**  |  |
| Ability to integrate with online payment systems (if taking online payments like donations or memberships) | **[ ]**  |  |
| **Migration and Support** |
| Ability to consolidate and migrate existing stakeholders information in bulk | **[ ]**  |  |
| Back-up and restores functionalities | **[ ]**  |  |
| Disaster recovery plan and protocols | **[ ]**  |  |
| End-user support | **[ ]**  |  |