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The Grand Plan

Single organisation-wide CRM system replacing

- Salesforce (fundraising pipeline)
- Campaign Monitor (communication with subscribers and audiences)
- Spreadsheets. So many spreadsheets!

The Sultan's Elephant 2006

Key Requirements

We needed the new system to have the following elements:

- SQL (or equivalent) access to data,
  - to allow reporting including checking CRM and Accounting records in sync
  - No fundraising reports were provided by the vendor as standard
- Developing the little used Fundraising module into a Minimum Viable Product
- Carefully sequenced upload of data migration

London's Burning 2016

![CFG INSPIRING FINANCIAL LEADERSHIP]

The Implementation

- Delays – late production of migration spreadsheets wasted many weeks

- Data migration wasn't sequenced in the agreed manner: we provided data sets in order of oldest to newest, and each upload was supposed to be an "Upsert" (Update of existing record or insert of new record). Instead, vendor added the records for each data set, leading to thousands of duplicate records

- Bottlenecks in the process as only one part time employee was able to upload data

Lumiere London 2018

ARTICH🌹KE

Going Live

- We had to design the way the Fundraising Module worked as vendor had minimal experience with the model. Where MVP data fields were not present, we had to repurpose other fields (e.g. to allow us to keep track of grant instalments)
- When we went live with the Ticketing System, the performance was poor, leading to visitor complaints and anger being expressed on Social Media
- Vendor unilaterally disabled the SQL link to our data, without warning, and wouldn't discuss this issue for several weeks

Processions 2018

Co-Development

When vendors have a module which needs development, they will sometimes agree with an incoming customer to co-develop.

- Customer's specialist knowledge in a specific discipline will allow the vendor to fast-track development on an area of the product the is underspecified
- Customer gets a level of customisation for free, and a product which aligns to best practice

Telectroscope 2008

Co-Development

However …

- Vendors may make promises they do not intend to keep, in order to land a new customer
- Vendors' strategic drivers may change
- Vendor may have insufficient bandwidth to deliver on their promises

Lumiere Durham / Bishop Auckland 2023

Data Access

Data Access may be driven by reports (PDF / Excel export) from the system.

- This may not give you access to all tables / data fields
- Any exported spreadsheet is over-written, so any formatting and pivot tables have to be done elsewhere

Direct data access (e.g. via SQL or OData) will allow you to develop sophisticated spreadsheets which refresh from the live system when loading. Perfect if you need to ensure your CRM and Accounting Systems are in sync

Excel can be a best-of-breed reporting tool

La Machine 2008

Current Thoughts

- No material progress has been made, in two years, on making the Fundraising Module into a an MVP (which was to be the main focus of the vendor's activities in 2023). We spec'd it in November 2022
- Quality of training and Customer Service should be paramount
- "The Customer Is Always Wrong" is not a great optic
- Any vendor which unilaterally withdraws a customer's access to its data reporting engine … a move which could bankrupt some businesses … is arguably a vendor unconcerned with its reputation

Sanctuary 2022

Lessons Learned

- Ensure joint development agreements are in a side contract
- Ascertain the product roadmap and timelines
- Be wary of a small vendor which may have limited resilience
- Ask the right questions about a vendor's trustworthiness from reference sites
- Ask about a User Group
- Share examples of shabby behaviour, to help others avoid a repeat experience

Herd 2023