Devon Communities Together (DCT)

Scoping Paper for a CRM System

June 2019

Contents:

A. Overview

This paper was created from meetings undertaken with DCT employees. The meetings were led by a questionnaire designed to establish:

1. How a CRM system would improve DCT's operation.
2. The specific technical requirements of employees.
3. The general level of employee technical expertise.

DCT requires a CRM system that can:

1. act as a database for its diverse range of contacts, including individual members, community groups, project partners and representatives of national and international organisations
2. increase integration and awareness between DCT staff about what projects other employees are working on in order to maximise DCT's continuity of service
3. be as easy to use and intuitive as possible
4. comply with GDPR regulations

The budget in the region of £6,000 initial costs.

The timeline is implementation within 90 days.

B. DCT Background

DCT is a medium sized independent charity that specialises in community development across Devon. There are around 20 employees with an office in Exeter; much of their work is in the field undertaken in remote rural communities.

DCT aspires to create inclusive, diverse and resilient rural communities. Key social objectives are to ensure that communities have increased capability to address local issues, become economically stronger, become more resilient and resourceful and are healthier and more inclusive.

In order to achieve these social objectives DCT undertakes numerous funded projects with a variety of stakeholders, ranging from Devonian parish councils to the European Union.

C. DCT's Current System of Working (CRM)

DCT currently utilises MICRM which is unpopular with employees and insufficient to DCT's purposes. Although still live, employees solely use it to record their timesheets. It is not used for conventional database purposes or project management: very few staff members know how to use the system.

Currently, DCT employees manage contacts, planning and delivery of projects, impact measurement, marketing and any other administrative tasks on an individual basis locally on laptops and through a shared drive across numerous spreadsheets.

The current working method, as observed by employees, lacks any central organisation of information and increases pressure on all involved with the charity.

D. How will the new system be required to support existing processes?

The 3 key things that DCT employees felt inhibited efficiency:

1. A lack of a centralised and accurate contacts database inhibits daily tasks for all employees.
2. A lack of a centralised location for project information increases pressures on Project Managers.
3. Reporting Processes are inhibited by the existence of multiple streams of hard to find information and data.

Taking the points in order:

1. Centralised Contacts Database

Currently an ad-hoc database is held on the old MICRM system, but this is out of date and does not clearly distinguish between different types of members/entities nor does it do so by geographical scope. Employees largely manage their own interactions with external entities and record these in their own way.

The new system will be required to clarify and centralise the information held about DCT's various contacts and different interactions with them in order to increase staff efficiency and maximise the charity's continuity of service to its stakeholders.

All employees articulated a need for a database that detailed how an entity was involved with the organisation, what projects they were involved in and a historic record of interactions with that entity by other DCT employees. This is particularly important given that many entities involved with DCT interact with them at different levels. i.e. an entity might interact with DCT as a member of a Parish Council, but also separately help them run an initiative with a local sports or drama club.

2. Project Management

Currently projects are managed on an individual basis by the responsible project managers who keep their information in a way that suits them. These are uploaded onto the shared drive and include budgetary information, planning material, implementation procedures, combined with the data and work that goes into the delivery of the project. Lots of core project information is kept on various excel spreadsheets, but not in a central location in a standardised manner.

The new CRM system will need to support project management by collating key project information into one place. A clear summary of the status of a project could be displayed on the CRM that showed the key details about the project: its progress, its budget, key partners, along with links to other key information.

Collating this information would not only ease the pressure on project managers, but the centralisation and standardisation of information on one system would enable senior management and other DCT employees to quickly see what was going on in a project.

3. **Standardising Reporting Processes**

Monitoring and Evaluation is a key element of DCT's operation as a charity that must be accountable and demonstrate value for money to its funders. Currently, individual project managers have their own method of storing information for monitoring and evaluation. The reporting requirements vary on a project by project basis dependent on the specific requirements of a donor. Alongside tailored project reporting processes, DCT creates quarterly and annual reports for its own purposes.

Project managers are required to compile reports that include a variety of quantitative and qualitative data to the Director of Operations. Presently, these reports are a source of frustration amongst many DCT employees since they require searching and collating data and information from multiple streams and locations.

The new system will be required to alleviate this frustration and quicken the reporting process by providing clarity over the sources of information. It will need to provide a centralised location for employees to record key information, which can then be accessed by the required personnel for reporting processes.

These 3 key inhibitors to DCT's operation illustrate that the main role of the new CRM system will be to create a centralised and standardised database of contacts and project information that can be accessed intuitively by all employees.

E. Technical Specification

Below is an outline of a specification for a potential CRM system for DCT. Tagging of information has been recommended as the best way to keep the system intuitive and flexible. DCT welcomes any advice on elements suggested here and the below should be treated as a broad outline of what would be included in the CRM.

1. Contact Database
2. Contact Log
3. Record of Interaction
4. Donation Tracking
5. Reporting
6. Search
7. Project Management
8. Events
9. Timesheets

Taking the points in order:

1. Contact Database

Contact type can be any type of individual contact e.g. volunteer, member, client, attendee and a contact can have multiple engagements e.g. link to projects, organisations and events. It would also be good to be able to have the CRM to undertake the following activities and functions

It needs to serve as a basic contact database for all the entities, and their associated information, that DCT interacts with.

Below is an outline of the types of the data fields DCT requires when inputting information about entities. It is envisaged that each field will come with drop-down menus or options to input information manually. This is to add the right digital tags to the entity.

- **a)** Standardised approach to data capture
- **b)** Contact name
- **c)** Link contacts to company or organisation name
- **d)** Link contacts to company or organisation type
- **e)** Address
- **f)** Telephone Numbers- Options to put up to 3 different numbers in
- **g)** Email- Options to put up to 3 different email addresses in.
- **h)** Contact preference (phone email etc.)
- **i)** Type of entity- E.G a local group/individual/donor/beneficiary
- **j)** Membership type- E.G member of the Devon Oil Collective/Partner Organisation- ability to enter more than one option here is essential.
- **k)** Date of Membership Initiation + Current Membership Status
- **l)** Enable users and contacts to have participation in projects
- **m)** Permission for DCT to use any photographs
- **n)** Subscription to information services, social media, mailing lists with auto remove
- **o)** Record of engagements, hours etc with selectable measure
- **p)** De Minimis funding record
- **q)** Tracking payments / payment history
- **r)** How to close / archive contacts (when project has finished, or contact chooses no longer to have details stored on a database.
- **s)** Manage investigations and report feedback and complaints.

Certain projects might require a mini-database section: **E.G.** Empowering Enterprise, which involves collating a list of job opportunities/placement providers and matching them with people seeking a placement. Ideally there would be the ability to tag this information when putting in the contact to clarify its sole importance to one project or input this information separately through a project management section of the CRM.

2. Contacts Log

The CRM system must be able to record emails sent to and from entities and show them on the entity information page. This would show interactions including records of meetings manually written up by DCT staff and a record of email outbound/inbound interaction. This is necessary to show DCT employees the most recent interaction a certain entity has had with the charity.

The CRM system must automatically notify DCT about issues with an entity: E.G. if their membership is coming up for renewal. This is to ensure that DCT maximises constituent retention.

3. Record an Interaction

DCT staff need to be able to record interactions they have with stakeholders/partners etc. This element should include the following fields of data entry:

- **I.** DCT Staff Member – Drop down menu so they can select themselves/other DCT staff involved.
- **II.** Non- DCT participants – Opportunity to input who attended.

III. Type of Interaction – Drop down menu listing whether it was a meeting/phone conference/visit to a parish council. Add options as appropriate.
IV. Outcome: Space to write what was achieved/happened.
V. Record hours
VI. Define next steps / actions
VII. Enable progression stage / client journey
VIII. Document upload

There should be scope to create reports based on types of interaction/dates of interaction/who was involved. By inputting information here, it should tag the information so if a DCT employee searches for a specific contact, it will show a record of any inputted interactions with DCT.

4. Donation Tracking

DCT would like the potential to track donations made to the charity by members etc. Ideally there would be scope to track these within the system and associate them with a certain entity to show how much people have donated. This element needs to be discussed with DCT management further by the vendor so that they can clarify how they would like to proceed. However, centralised functionality to receive and track donations is something that could prove useful for DCT.

5. Reporting

DCT directors often need to compile reports from multiple staff members. This section should facilitate the creation of those reports from the previously identified areas of the CRM. It could include the following search/requirement fields:

I. Type of Report: Drop down menu that lists where the data should be selected from – **E.G.** A timesheet report or a project report.
II. Date: Space to input the dates the report must cover.

It is unclear whether a separate reporting section is needed or whether reporting could be integrated into the sections from which the report data is being taken, such as the project reporting sub-section within the project management section of the CRM.

6. Search

It is envisaged that the CRM will have a dynamic search function that enables users to search for information in a multitude of ways. When information is inputted it should digitally tag the entity meaning that they come up when that tag is searched for. For example, all entities involved with project "X" will come up when project "X" is searched for. Material needs to be identified using just 1 or a combination of the following data fields:

I. Title/Name
II. Telephone number
III. Address
IV. Email
V. Area- **E.G.** "Exeter" or "Heavitree"- this needs to include parish council districts and MPs constituencies.
VI. Project- refine your search to a specific project
VII. Membership Type
VIII. Information Type: Option to confine your search to a type of information, E.G to find a contact/photo/report/document
IX. Date Range: Option to insert a date to your search-

7. Project Management

Project management functionality highly customisable given the diversity of project type that DCT runs. A Dashboard with sub-pages within it that include:

- **I.** Dashboard – unique to each user showing project details and information useful to them.
- **II.** Reporting: access quantitative and qualitative data and evidence. This would be supported by an automated reporting function, through which directors could then collate all these reports/data from different projects.
- **III.** Budgeting: to input budget information or upload information to track money in and out
- **IV.** Project Delivery: Stage gates, progress, milestones, outputs.
- **V.** Data import from multiple existing projects records
- **VI.** Support progression through project stages, client journey

8. Event Functionality

Many DCT projects and ongoing activities involve community members attending events run by DCT staff and partners. DCT needs to keep a track of bookings and accurate registries of who attended these events for reporting purposes. It is equally important for increasing DCT's database of potential donors. There would need to be a function that enabled:

- **I.** The creation of new events, inputting of basic information about those events and the project/DCT employees and partners it is associated with.
- **II.** Booking people onto events.

6. Timesheet Functionality (Optional)

DCT operate a flexible working schedule for staff so they can fulfil their hours at times suitable to them. It is envisaged that this section of the CRM will have the following data fields:

- **I.** Staff member: A drop down menu of all employees so they can select who the hours are being logged for.
- **II.** Date: Options to choose the date(s) they wish to log hours for.
- **III.** Type of Work: Drop-down menu listing projects or categories of work.
- **IV.** Description of work: A place for employees to input clear notes about what they did during the hours worked.

Reporting: Directors need the capacity to produce reports accordant to staff member/project/date. **E.G.** The ability to produce a report that lists all the hours worked on project "x" in January 2019, which will compile the individual notes by employees about what those hours were spent doing.

F. <u>Access to the CRM System</u>

DCT would require 10-20 Licenses with user type specific logins and permissions.

Mobile phone access optional.

User interface:

- **I.** User group specific dashboard
- **II.** System Search
- **III.** Create New Entity (prevents duplication)
- **IV.** Record an Interaction
- **V.** Project Management
- **VI.** Events
- **VII.** Reporting
- **VIII.** Super user enabled to set up and format projects
- **IX.** Timesheets

G. Customisation of the System

The CRM system needs to be adaptable and easy to change.

The contents of the varying drop-down menus for different data fields would ideally be easily edited as required by DCT management.

The project management tool would have to be easy to change since none of DCT's projects are equivalent and their delivery has many diverse formats.

H. Integration Requirements

DCT employees utilise several other systems that the new CRM will either need to integrate with or encompass:

- **Microsoft Office:** DCT employees currently carry out all their work utilising these programs ranging from the calendar to Word and Excel documents. Ideally the CRM would be able to sync the Microsoft Office calendar/diary currently used by DCT. Data from Microsoft office documents would ideally be able to be uploaded easily onto the relevant sections on the CRM and likewise information taken off the CRM and easily placed into such documents.
- **Email:** DCT uses Microsoft 365 and would like to be able to sync/track emails with the CRM system. This would include recording contact history between a certain entity and DCT. E.G if contact "y" emailed DCT, it would show up when you searched for and opened up contact "y" on the CRM system. DCT also sends out emails to large groups for varying purposes, from marketing to general newsletters. They currently utilise mass emailing software- *Send in Blue* to do this. The new CRM would need to interlink with this application to transfer the related contact groups/email addresses over for *Send in Blue* to use.
- **Budgeting – Explore:** DCT currently uses *Sage* to manage its budget. Explore integration with *Sage.*
- **Website – Explore:** Explore possibility of linking the CRM system with its website. So that if members make a payment over the site or update membership preferences then these would be automatically uploaded onto the CRM system.
- **Event Bookings - Explore:** DCT currently uses Eventbrite to record who attends their events. The new system would need to be able to link in with Eventbrite to associate certain entities who are booked onto an event with that event's associated project. Equally it could facilitate event bookings as highlighted in the specification above.
- **Timesheets – Explore**: wither within CRM or integrated to another system

I. Data Migration and Training

DCT currently has large quantity of existing contact and project information in excel spreadsheets saved on their shared work drive. This information will need to be uploaded onto the new system as easily as possible. Furthermore, taking data off the system is a priority for DCT: there needs to be a way to take completed project information off the CRM so that a record of it remains, but so the data can be filed as DCT requires.

DCT staff need to be supported in the use of a CRM system: this would be enhanced if there was insightful and tailored training. This could involve training up a couple of members of staff on the system and providing the rest with more rudimentary training. These selected staff members could then help others if they were stuck.

J. Ranking of Priorities

The CRM is sought to provide a highly effective simple as possible system that supports priority areas well and becomes the single unified source of accurate data on engaged clients, contacts and organisations; prioritised as follows:

1. Database & Reporting
2. Enquiries, referrals and progression on projects
3. Project management, tracking interactions & outputs
4. Stakeholder management
5. Marketing subscriptions & source analysis
6. Fundraising
7. Budgets
8. Timesheets

K. Conclusion

DCT has a budget in the region of £6k and would like to know how much of what is described here can be offered.

Simplicity should be prioritised over complexity.

Product support will be required, that will not involve any unexpected costs.

The system should support GDPR compliance.

The specification outlined is an “ideal world scenario” to act as a guideline to vendors when proposing different solutions.

Vendors should focus on emphasising to DCT the benefits of a CRM system based on increased contact retention, increased efficiency and reduced employee stress.

The right CRM system will help DCT maximise its outputs and improve its coherency as an organisation to help it successfully achieve its Social Objectives.

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