UNIVERSITY OF SAN FRANCISCO

CHANGE THE WORLD FROM HERE

Implementation of CRM Strategy Within the Nonprofit Sector: Toolkit focused on change management adoption.

by

Sara Abdel-Rahman Lopez
lopezabdel.sara@gmail.com

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I want to dedicate my project to the resilience and courage I inherited from my Father, Zoher Musa Abushanab.

Abstract

Customer Relationship Management (CRM) can be the tool that retains donors and avoids churns with personalized marketing. However without the right skills, organizations are destined to waste time and resources. There is no precise blueprint to achieve such mastery, only the right strategy and maintenance as times get more complex. This capstone focuses on the people factor management of a CRM implementation strategy. It analyzes how to achieve buy-in from staff taking in consideration the realities of the nonprofit sector. Objectives :Awareness:To alert leaders about the unavoidable challenges that can bring a faulty implementation that misses to get buy-in from staff. While alerting into the future of AI CRM spill over into the nonprofit.Solutions**:** Models that foster an entrepreneurial safe environment that can pivot when necessary. Intent to disrupt grant making culture and prove funders the fair chance of a full grant to hire a data person.

Acknowledgments

I want to thank Mariela and Mirna for supporting me during a stressful year full of challenges.

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Section 1. Introduction

Customer Relationship Management (CRM) can be the tool that leapfrogs organizations or a waste of time and resources. There is no precise blueprint to achieve such mastery, only the right strategy and maintenance as times get more complex. This capstone is a model that focuses on the people factor management of a CRM implementation strategy. The following chapters will shed light into ethical and management considerations that are equally important as the adoption process. Experts interview data reported ethical and management considerations that need to be flagged. The exclusive data driven privilege keeps perpetuating the income gap between larger and smaller nonprofits. The infamous starvation cycle usually starts with unrealistic expectations of funders (Tsai, J. 2010). With little to no accounted budget for donor base programs and most importantly a data person to maintain and make sense of the data the sector is losing time to level the playing field. Nonprofits need to have an infrastructure-planning process that can stand time and pivot when necessary.

Section 2: Literature Review

History

CRM designs are evolving extremely fast and given the innovative environment of the Internet of Things (IOT) it's only getting more assertive. The customers of this generation expect unique connections which is possible given most of the channels of communication are extremely customizable. In the nonprofit world it's called “Multi-channel fundraising” it refers to utilizing various approaches to cultivate and solicit constituents. The idea is to create various ways for constituents to donate or become more involved, depending on their preferences and what appeals to them as individuals. In order to do that we need to be aligned and store our data in online and not in offline places this makes it difficult to implement. (Grattan,2012) According to Payne & Frow, the term “CRM” emerged in the for- profit world in the mid-1990’s, with names such as electronic data interchange (EDI) and e-commerce. Often used to describe technology-based customer solutions, in the academic community, the term “relationship marketing” and CRM are often used interchangeably. This software tool is more commonly used in the context of technology solutions and has been described as “ information-enabled relationship marketing”. They concluded that “further explorations of the software and its related phenomena is not only warranted but also desperately needed. (2005)

Payne and Frow believe the vast definitions of CRM is negatively affecting how organizations start the process of implementation. After many debates and analysis the initial for-profit definition was summarized by the mentioned practitioners as;

> "CRM provides enhanced opportunities to use data and information to both understand customers and co-create value with them. This requires a cross- functional integration of processes , people, operations, and marketing capabilities that is enabled through information, technology and applications." (2005, pp.2)

Many others have studied CRM phenomena contributing valuable literature,the dissertation of Grattan, K. E., in 2012 answers, What can CRM do for the non-profit sector?

> "In the 1990s, vendors realized there was a burgeoning market for CRM systems specifically designed for nonprofits. This led to a repurposing of for- profit CRM into that which would be used by nonprofits. Traditional Customer Relationship Management became Constituent Relationship Management. Soon there were many nonprofit -tailored systems on the market". (2012 pp 5)

However the nonprofit sector's priority tends to be the populations it serves. Along with the donors, the second factor is the volunteers and advocates and partnerships. A short description of what CRM ideally does within the non-profit that I found could drive a better definition within the sector. "CRM enables an organization to better create a personalized, one-to one experience for the customer based on their preferences and history. When optimized, the individualized experience fosters feelings within the customer of being cared for by the organization. New marketing opportunities are created and the organization experiences increased customer satisfaction and loyalty. “(Payne & Frow, 2005 pp,. 3)

Within the range of capacity there’s various levels, from international workforces to a two person organization. Such small teams can avoid implementing CRM and dedicate their valuable time to their mission. Some commonly known CRM strategies come out of the box and ready to use for nonprofits, but are a shiny price with responsibilities attached to its greatness. The principal and most used strategy is the “Database marketing” readily applicable to retailing- creation and use of databases in conjunction with information technology to improve both the efficiency and the effectiveness of marketing activities. With such robust marketing initiatives Loyalty programs were designed, armed with customer databases and the technology to consistently gather and analyze customer data. Marketers are in a position to take active measures to develop interactive programs that not only identify but also reward and acknowledge their best customers or donors. Knowing the target market profile and instituting some promotional activities has proven successful resources of the not-for-profit store and the strain on volunteer resources. Successful implementation requires a bundle of capabilities and competencies- human, technological and organizational, to all synergistically work together. (D. Linda, et al 2016)

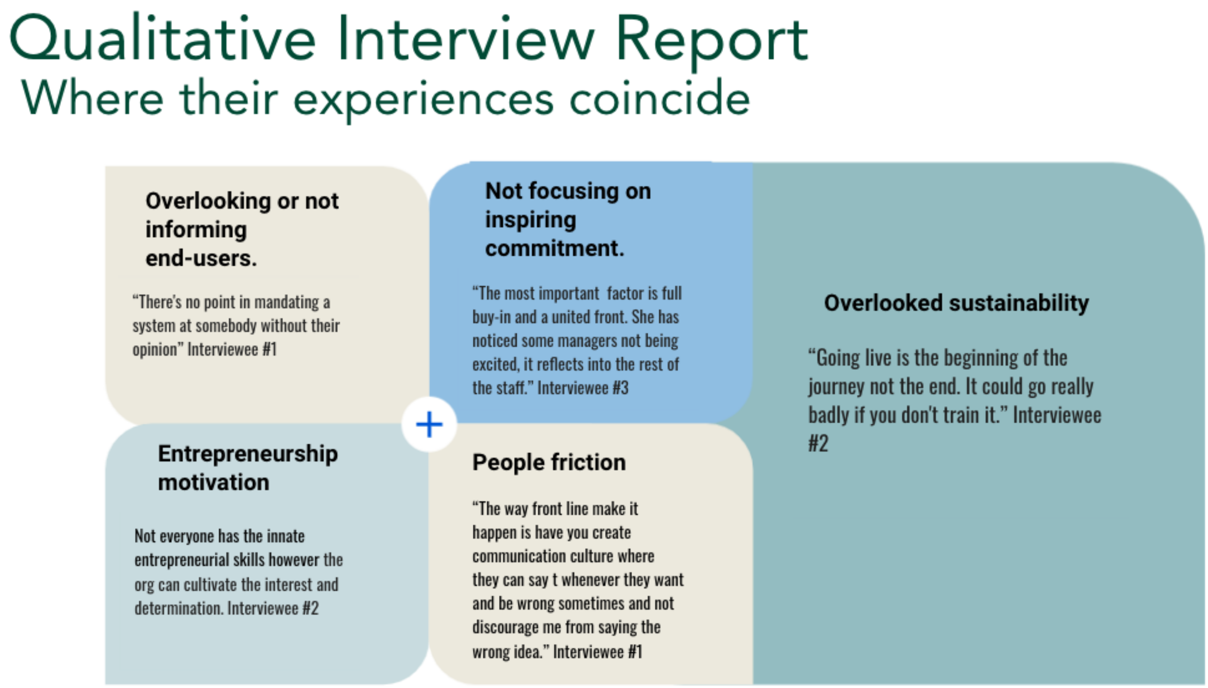
Section 3: Methods and Approaches

The mixed method used for the data collection was an in depth research and analysis of case studies, comparing suggested frameworks I condensed the best advice on managing people during an implementation. From the expected and proven results explained in the case studies I designed a semi-structured interview to compare the experiences of my interviewees. My standpoint for this analysis is to prove the importance of soft skills to lead an implementation. Softs skills are often overlooked when recruiting in the tech environment. This analysis is helping me gain knowledge for my future role as an Implementation Architect.

For my secondary data I chose a sample of consultants both freelance and a Sr. agent from the consulting firm Exponent Partners and Capacity Blueprint. To diversify the data I also interviewed the Director of Evaluation and Data from MEDA, a San Francisco Economic Development organization, to compare the literature with her experience. The consensus of all their answers was various pain points and overlooked factores from the sector that urgently need to be addressed.

Section 4. Data Analysis

Table 1: Experts interviews: Consensus



Consultants and staff experiences: Interview Data

For my secondary data I chose a sample of consultants both freelance and a Sr. agent from the consulting firm Exponent Partners. To diversify the data I also interviewed a Director of Evaluation and Data from a San Francisco housing organization to compare the literature with her experience. The consensus of all their answers was various pain points and overlooked factores from the sector that urgently need to be addressed.

Sustainability

Another overlooked and underrated area is the push to develop new competencies to maintain the software. If leaders can't hire a long-term employee exclusively to oversee the service innovation initiative they need to proactively invest in a person or department to operate it, by providing training or educational reimbursement to acquire the skills or creating a system that fosters entrepreneurship.Another statement that persisted was the unrealistic vision of funders and grant making culture regarding funding databases but without the data person. Leaders can assess and study the entrepreneurship of a particular staff member. This could be by initial motivations. Usually the person that projected himself as the most entrepreneur is called the "accidental admin". This important player during the implementation will run and maintain the data "even if in the past they used to maintain everything in excel that helps the implementation succeed." (Interview 1 & 2, 2021).

"If the data person is not vigilant in the adoption the frontline providers would still track factors from a grant that expired 3 years ago wasting the time and not committing to the mission. The relationships of the "admin" or "super user"with the frontline providers has to be close to give the appropriate changes, even if that means "running and taking notes in the hallways" as time is a luxury in many nonprofits." (Interview 1, 2021) It is a missdrift of the organizations mission if we let the staff focus more than 50% of their time in data entry, if that is the case and your nonprofit can't hire an entrepreneur with the skills or the interes in data data entry it is better to reevaluate the CRM implementation project. In this digital world data entry is not a skill many possess and when the implementation consultant finishes the project many experience the immobility of the organization because it's simply not easy, a group of people need to be engaged at all levels. And ultimately consultants will only give advice to organizations to be open to feedback but won't alert the failures of not having someone already in charge of the data leaving the responsibility of adoption entirely to the staff. (Interviewee #2, 2021)

Commitment from top to bottom: a symbiotic relationship

One of the questions asked to all participants was their views about the commitment they thought was more impactful during implementation. The consensus was they all understood the symbiotic relationship of top and bottom, through the lens of scheme hierarchy. They also agree real meaningful change is the one from button up, the people doing the work and crafting the tool. For many reasons including the relationship with the constituent shapes the data entry and they are the closest to our constituent. We advise leaders to find the balance of collecting data for many purposes not only for the funding, MEDA uses it for policy change and other organizations for internal evaluations.

Prioritize understanding the process phase collectively

James Bullard at TransFair USA- says the hardest part of the job which is 80 percent of the work is defining existing business processes, enduring endless meetings, drawing up diagrams, and establishing policies, procedures, and reports. (Tsai, 2010,p .7

The emphasis on understanding the process should be taken seriously to avoid assuming the value in every step of their daily work.

Section 5: Implications and Recommendations

1st Consideration : AI side effect, Ethical issues and power imbalance.

During the 90's CRM was a shiny tool that was exclusive, now in 2021 CRM combined with AI can" flag anomalies or correlations a human might oversee. And at their simplest AI technology scores individuals for their likelihood to renew memberships, increase donations or attrition .Part of the AI strengths is integrating data from multiple sources. The system can divide donors around where the development officer is located and can pull in the nearest cafe or restaurant where they can meet.(Levey, R. H. 2020) Applied to the current environment of Covid precautions "the system has a crisis management model which isolated donors in hotspots and crafted notes" (Levey, R. H. 2020, pp 2)

There is no question that the vast availability of data will continue to expand as our necessities are transacted online, subsequently as service advances data analytics will enable service marketers and managers to better define their consumers' buying patterns. (D. Parris, 2016). In for-profit this pervasive technology has its spillover; the marketing intervention affects not only the targeted customers but also those who are connected to them. In particular, the connection has higher consumption and lower long-term churn than connections who were not treated or planned for. Influential research in the for-profit arena has found the negative social effect of some campaigns because the benefit and or incentive is offered only to the targeted customer and is not available to the non-targeted customers. (Ascarza, E. et.al, 2017).

This issue, to my knowledge, hasn't been studied in the not-for-profit arena, limiting my analysis, however in the for-profit researchers call to regulate and study this spillover and the connection to consumer independence that can be at risk.“The implications are not trivial. We are moving toward an economic system wherein customer prioritization may dominate much of customer relationships and where only a minority of customers is capable of taking advantage of the new technologies.” (Libai, B.,2020 pp 10)

> “AI CRM without regulation means a defacto better estimation of future individual transactions along with improved ability to create individual-level granular price and quality discrimination designed to increase firms profits and reduce consumer surplus. The ability to target and discriminate among individuals based on real time data will likely contribute to increasing social inequality. At the same time, the loss of consumer autonomy in the age of AI may result in reduced consumer perception of being manipulated or discriminated against.” (Libai, B.,2020 pp 2)

I strongly believe that in the near future we can still make a useful case for Nonprofits that use AI-CRM capabilities, biassed algorithms aside. Current CRM has been researched in non-profit retail shops like “Ten Thousand Village " it has been proven on how they effectively leverage big customer data, seeing an increase in customer loyalty. (Joyce. M, 2006) Other fascinating reports extracted from leveraging big data is that it can be useful for donor behavior that can be mapped and avoid the churn of losing lapsed donors. While AI-CRM should be closely investigated and regulated to avoid negative side effects. This does not mean the full disappearance of relationship acquisitions roles like fundraising agents in the near future. For decades staff in Non-profits have been telling their brand story and no machine can nsubstitute that human connection; however it's an option companies are increasingly adopting in the for-profit arena.Author Libai elabores more;

> "AI appears to be moving along a trajectory that began with mechanical capabilities passed through analytical capabilities necessary to recognize and understand human emotions. We have already seen that algorithms can score one's personality better than friends, or even than oneself. Indeed, not only computer scientists can improve AI, but neuroscientists also work on AI, as understanding how both computers and humans learn can inform algorithm design. In fact, AI CRM capabilities do not need to achieve full human empathy to complement or even replace human CRM judgment. (Libai, B.,2020 pp. 4)

Power Imbalance

Tsai, J. article covers the beginning of the overhead metric, back in 2005 the IRS with the aim of increasing transparency redesigned the 990 form. This change still requires organizations to disclose the share of donations spent in overhead. Coincidentally the new reporting comes after a year of significant revenue loss in the not-for- profit sector because of fraud. Underneath the well intentions of the IRS it has unfortunately taken such weight that it often stifles technology initiatives that might otherwise benefit an organization. "The catch 22 is this : Beholden to funders and regulated on expenditures, nonprofits need proof that any solution will be worth the investment, but with too few use cases in the industry, the necessary evidence is sorely lacking.” (Tsai, 2010) I found this to be true in one of the results of my 2nd expert interview during her 9 years of experiences she has seen the failures and big wins of the data driven trend, she explains that her organization received a big grant from a prestigious foundation, they were pretty much dictating the indicators of debts. In many cases the data you collect is an exact mirror of what the founders are dictating to you. Most organizations report for funders ,many nonprofits are not tracking the data that serves them and their constituents. “Catch 22: the fashion for winning grants is that you can show off data-driven proof you are effective with data. Although the majority of organizations can't spend money in the donor database. Ultimately, they have and have not perpetuated an income gap within the industry.” (2021)

2ns Consideration: Innovative culture at its core: Implications and Motivations

First, I have to point out the limitations of research, due, not only to variations in definition, but also phenomenal elements of surprise and unpredictability, and as such, the difficulty of bringing every organizational aspect into a singular study on innovation. Toward an understanding of the role of human resources in cultivating a climate for innovation in nonprofit and public org. (J. Ronquillo, 2021)

> “In a survey of Administrative Studies projects respondents differ regarding the statement, “Employees are more creative and innovative.” Of the public sector respondents, about 6% claimed their own sector respondents had more creative and innovative employees, whereas over 65% said business sector employees were more

innovative, and slightly more than 28% said no difference existed. Nonprofit sector respondents were more likely (about 13%) to say that their public sector counterparts were more innovative ” (J. Ronquillo, 2021, pp2)

These large variations show the need to analyse in depth the public and nonprofit sector particularly the human resources levell. As you can see there are some weak projections of the sector not believing they have an innovative culture.With my analysis I found that motivation is an important point affecting innovative behaviors in the workplace, and there is literature to prove it. Here are some recommendations . The first thing to evaluate is how the organizational climate feels in your organizations? “There a number of scales that classify as either environmental stimulus (eg. freedom to do one’s work, having to work on challenging tasks, and a cooperative work environment) or obstacles of creativity (e.g., too much work to do in the time allotted, excessive negative criticism and maintaining the status quo).”(J. Ronquillo, 2021)

We can use this as guidance however from recent 2021 research there is still no literature that comparatively analyzes the effect of various types of motivation on the innovative climates of nonprofit and public organizations despite the important relationship. Motivation can be both extrinsic or intrinsic sources. Extrinsic motivation refers to motivation which “arises from the desire to obtain some outcomes that are apart from their work. Organizations can provide extrinsic motivations for example; possibilities of advancement, bonus programs , and employee performance rewards.The result is a visible enhancement of creativity and ingenuity, which form an innovative climate. The other form of motivation is intrinsic, this refers to a person's internal desire to do something , research points out to this form of motivation to be the most successful. Building a flexible work schedule adds a higher importance and focus on work. The more freedom people have in carrying out their jobs, the more likely public and nonprofit organizations will be able to enhance their innovation climate(J. Ronquillo)

During the Masters Program I've continuously heard situations where friction between employees arized. Specifically for having a noticeable innovative personality, in scenarios that pertain to an adoption of a donor base software. " When a worker's innovative behavior interacts with her job involvement to produce conflict, and thus relationships with co-workers who are more resistant to change become strained. To maintain good working relationships, some employees may conform to the status quo and are thus less likely to engage in innovative behavior".(J. Ronquillo, 2021 pp 5) Some concerns may arise among front-line workers, the perception they might not be doing their job well, .so any change could mean losing their jobs it will automatically generating resistance with the adoption of a technology solution, metric associated with the adoption of a technology brings visibility it can feel like a threat or a direct incursion into their autonomy. (D. Linda , 2016) Surprisingly the results are mixed among the control variables. Results show that the year of establishment is negatively related to the innovation climate and statistically significant.

"Even if the resources are not allocated for career advancement considering that some continue to assert that certain types of organizations in the nonprofit sector are still enlarge part driven by altruism and intrinsic rewards, with a number of employees placing less aspirational emphasis on promotions in nonprofit organizations,or perhaps where nonprofit organizations may even benefit from this nonexistent factor by restructuring into the trend of more flat,team-oriented management structures and promoting equality among employees to encourage a cohesive and inclusive work atmosphere in order to benefit the organizational innovative climate" (J. Ronquillo, 2021 pp. 10)

3rd Consideration: Be aware of the risk of failing

> "According to the Gartner Group, a research, and advisory group, as many as 55% of all CRM projects do not produce results and the failure rate is expected to reach 80% in 2003. Meta Group which found that up to 75% of CRM efforts fail to meet their objectives."(K. Line , 2004)

Organizations in the lower income bracket, are habituated to any low budget or free technology tool regardless of relevance. Instead researchers insist on measuring the pricing for the right tool and the possible outcomes always determine the return of investment (ROI) to make the correct choice. It is important for the sector to understand that resource insufficiency is an obstacle regardless. (Tsai J., 2010) Another way of failing during the venture of implementing CRM is implementing CRM before creating a customer strategy. (K. Line , 2004) A faulty crm implementation can actually damage customer relationships.

4th Consideration: The power of commitment and inspiration.

> " Usually in a bureaucratic culture organization not much inspiration would come from it." (Interviewee #1)

Adopting a service innovation requires navigating and altering the socially complex service ecosystem. Broad org buy-in is essential for a service innovation to be successful; however , resistance to change is the norm. In a traditional bureaucratic and individualistic environment change won't come if the top management doesn't demand the work to be completed. First of all we should assess ourselves as top managers if we are committed to the vision, if we possess strength and capability to drive through change to completion. Organizations need to proactively obtain commitments from all stakeholders groups and realize that a commitment from top does not necessarily mean a it comes from everyone.We also can't expect the frontline staff to craft and have an excellent adoption because they don't have the time, space or skillset to make that change in data. It is the responsibility of the leaders to ensure the tools used serve both purposes. Practitioners recommend first comparing the current awareness, buy-in and ownership from the desired state before going live. If it was a big gap the team should pivot the strategy. (K. Line , 2004)

Within my research I found a strong case study of the Arizona State University athletics department implementing CRM. They are also bureaucratic organizations and proved the existence of benefits and challenges. "It demonstrated that a successful implementation is not easy or quick, they found the main benefit was an increased revenue which led to better data and personalized marketing. On the other hand, the challenges they encountered were plenty. One of them is obtaining commitment" (D. Parris, 2016 pp 5) The article focuses on creating value through service innovation and how most organizations including for-profit resist change in a bureaucratic setting. Commitment can also be sparked by clear communication building a two-way flow of information within the plan. Including plans, approaches and activities to build awareness, enthusiasm.

The business case for changing or the business value is the degree to which there was a justification for changes towards implementing CRM. In terms of current pain and/or potential to exploit opportunities. In ASU's case study people wanted to see hard facts and this triggered the project group to start considering what benefits each department specifically might gain from building commitment. As humans we are visual creatures, we recommend leaders to draft a clear picture and statement of what the organizations would look like in the future and the extent to which it was consistent and shared by all. (K. Line , 2004) The continuous momentum should be fostered by current human resource processes- recruiting, performance management, training & development, employee relations, equalities the new candidates should be advised of how the organization expects to support the CRM vision and drive new behaviors to support it. If the traditional status quo does not fit the vision, leaders should consider a change in architecture. This requires a comprehensive plan to coordinate change. with people identified at all levels to manage the transitions. These people were/are known to be engaged in the process and working towards shared goals. (K. Line , 2004)

5th Consideration : Defining CRM and building a strategy for success.

Most of the practitioners suggest that the absence of a strategic framework for CRM from which to define success is one reason for the disappointing results of many CRM initiatives. (Payne, A., & Frow, P. 2005) Another reason for the failure is when the large majority don't have a clear understanding of what CRM really entails. (K. Line , 2004) Experts advise the error of leaning into metaphors, if not correctly defined it can shape what is understood and what is expected by those hearing/receiving the message and those producing the message.(Gray, F. E., ,2019)

To clarify an example of metaphors interrupting a good flow of information is discursive resonance; metaphors may operate well beyond an initial association and evoke a wide range of related correspondences. Specifically in the case Gray authors, while ‘traffic’ is the most frequently used transport-metaphor-related noun, ‘drive’ is the most frequently used transport-metaphor-related verb. To say you want traffic in your nonprofit webpage and to drive traffic are both different strategies to plan hence why we should avoid or correctly define our strategies. (Gray, F. E., ,2019)

Section 6: Conclusion

Frameworks and Practices

Literature finds that few CRM frameworks exist; those that did were not based on a process-oriented cross-functional conceptualization of CRM. To conclude my analysis this new framework includes practical insights to implement CRM with a united front and bring awareness of the unavoidable difficulties.The authors emphasize the need for a cross-functional, process-oriented approach that positions CRM, at a strategic level. This in turn helps identify the necessary cross-departmental infrastructure changes that make it possible to face the tactical challenges of business process and systems integration. (K. Line 2004)

Figure 2: New Model with considerations and qualitative interview data applied.

Step 1: Project Definition Plan

Within my research we stated all the definitions of academics and practitioners both in the for- and non profit sector. This topic was consistent within the case studies (C., Joyce, 2006) (K. Line , 2004). With all the discrepancies I believe firmly the first step is to correctly define the CRM functions and how it achieves the desired objectives. To inspire a change I recommended meshing in some verbiage from the organization's unique mission statement to the CRM goals as a strategy to enhance commitment.

Step 2 : Strategize

Evaluate what business strategy is the company adopting: This process starts with a review or articulation of a company vision especially as it relates to CRM. The industry's competitive nature should be taken into consideration. For example, a customer strategy involves examining the existing and potential customer base and identifying which forms of segmentation are most appropriate. The strategy can also be geared to analysis, most organizations track data for funders.We need to be vigilant of not leaving behind the importance of tracking data for policy change, internal shift or for betterment of human resources. For a multichannel integration process

Step 3 : Value Creation Process

Compare the service innovation potential benefit with the desired improvements from your org.

Buy in- disruptive innovation of the internet , more and more consumers expect personalized comms from org and brands.

Step 4: Evaluate Commitment and Staff Capacity

Figure 3: Levels of Commitment

As identified in the 4th consideration employees can be driven to support or resist the process of innovation and their perceived empowerment can significantly influence org initiatives. We want to make leaders aware no to overstep and to respect the limitations of frontline staff. Implementing a service innovation incurs two distinct costs, monetary and psychological. Monetary, consist of the cost of the technology, training and salary, along with implementation costs. The psychological, changing the organizational culture and processes and increased visibility into individual employee contributions through metrics. (D. Linda, et al 2016)

Step 5: Ongoing Assessment and Open Feedback

A performance assessment process.This part covers the essential task of ensuring that the organization's strategic aims in terms of CRM are being delivered to an appropriate and acceptable standard and that a basis for future improvements is established.
(payne and frow, 2005)

Recommendations and limits of the study

“The broad approach to public and nonprofit organizations generally did not permit us to take more nuanced looks at the greater variation of the types of nonprofit organizations and state agencies within the sample, we certainly encourage future research to do so when possible.”(J. Ronquillo, 2021)

A different challenge facing researchers seeking to draw comparisons or contrast across sectors is the difficulty of segregating organizations into distinguishable categories for purposes of comparison. Third sector organizations are often grouped into general “nonprofit” categories whose components vary widely among themselves . a purely charitable giving organization and tax exempt business association may both be considered nonprofit organizations, even though their missions, size, and capital resources differ. However these distinctions are critical to understanding the influence of human resources on innovation since both depend on the conditions found within those organizations and as such als differ according to sectors. These large variations in the perceptions of innovation indicate the need for more analysis of the public and nonprofit sectors at the organizational level, particularly regarding the influence of human resources on innovation. No wonder there is so much hesitation into submerging our organization when Researchers have not sufficiently addressed the role of risk in service innovation. (J. Ronquillo, 2021)

Risk plays a critical role in fostering change which is one dimension of service innovation that deserves more scholarly attention.

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Interviews

Interview #1

Michelle Reiss- Top , Technology & Data System Manager at Mission Economic Development Agency (MEDA)

Over 16 years experience implementing data systems, case management and outcome tracking systems. Seven years in the nonprofit and human services arena with a focus on bringing innovative data analysis and technology to the service providers and families of San Francisco's Mission District.

linkedin.com/in/michelle-reiss-top-787a962

Interview #2

Zeina Saad,

Sr. Consultant in Exponent Partners

11x Salesforce Certified

Interview #3

Dave Byrd, Senior Advisor

Board of Managers at the YMCA Stonestown Branch in San Francisco, the University of San Francisco Masters of Nonprofit Administration Advisory Board, and as the Co-chair of the Capacity Building Action Team for Shape Up San Francisco.

6287773026 (Mobile)

dbyrd49@gmail.com

Author's Bio

Sara Abdel-Rahman Lopez's first achievement was to complete her BA in Modern Arts Languages focusing in Italian and Portuguese from the University of Puerto Rico. Thanks to her multicultural competence she has worked in the field of guest services on a global level in iconic cities like Sydney and San Francisco. The adaptability she has developed allowed her to understand human behavior and seamlessly manage uncomfortable situations. In the past 2 years she has been immersed in the public sector world. Being admitted to the MNA Programs of USF has been her latest accomplishment. Working full time as a Guest Service Coordinator for Salesforce.com and a part time student has enhanced her time management skills. With an amplified set of competencies, she has been able to network within Salesforce.org, the market's leading donor base software and CRM constituent relationship management. The MNA program and her curiosity of mastering the NonProfit Success Package set her for the audacious goal of coaching herself to become a Technical Architect for Salesforce.org. Her stretch assignments as an Executive Assistant gave her the opportunity to plan employee volunteer activities with Glide Church,Family House Inc and Alcatraz Gardens. Recently she co-funded a committee within her team that promotes inclusive work and career development. She is grateful for the professors that polished her leadership and management skills and the MNA cohort who display examples of social sector values.