Implementation of CRM Strategy Within the Nonprofit Sector:

Toolkit focused on change management to enhance adoption.

Sara Abdel-Rahman Lopez

Class 662: Nonprofit Data Analysis
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Instructor: Dr. Tavanti
OVERVIEW & PURPOSE

● The project generates a toolkit that serves as a blueprint for organizations planning to adopt Customer Relationship Management (CRM) technologies in an effective and aligned manner.
● The project explains the challenges within the management of people during adoption and other relevant considerations.
● As societal problems become more complex, innovation in various forms becomes critical.
● This analysis gives me great insights into the relationship of technology and people during change.
PROJECT OBJECTIVES AND VALUES

Values

- **Innovation**: As the pandemic accelerates digitalization, furthering data literacy and reporting is critical to acquire funding. By leveraging the capabilities of a robust database marketing can accelerate and recruit more donors.

- **Transparency and Accountability**: The blueprint includes a model to choose the commitment level staff requires. Bringing all staff to buy in at different levels will bring fairness in the work division while implementing and maintaining the data entry. The division of work load in to prevent having front line staff spending more than 50% of their time entering data.

Objectives

- Analyses and compare experts framework and adapt it to the realities of small nonprofits that do not have a CRM in place.

- Create ethical and managerial considerations withdraw from the data analysis of qualitative interviews expert interviews.
METHODS AND APPROACHES

- The data was collected with a mixed method approach
  - Review of current literature
  - Qualitative interviews

  ■ Michelle Reiss-Top, Data & Evaluation Director at MEDA
  ■ Zeina Saad, Sr Consultant at Exponent Partners
  ■ Dave Byrd, Sr. Advisor at Capacity Blueprint

Implementation of CRM strategy within the Nonprofit Sector
Expert Interview Questionnaire

- Professional Background:
  - How long have you been working in the Public sector, specifically with donor
    data?
  - Is it a collaborative role? Ex. you need a bird’s eye view to understand the process
    of budgeting?

- Implementation
  - What approach has been successful?
  - Do you have a planning committee?

- Commitment
  - How was the commitment from leaders portrayed?
  - Did you explain to employees the value? time/ money
  - Were you transparent on the risk (money and time) of a failed CRM
    implementation?
  - How do you handle resistance to change?
  - If you were to mention a factor that was missing or overlooked what would it be?

- Ethics
  - Fundraising and Philanthropy - Grant requirements?
  - CRM skepticism in the nonprofit sector

- Overhead
  - Recruiting, training, and innovation
DATA ANALYSIS - Qualitative Expert Interviews

**Ethical Considerations**

- Data driven culture indirectly furthers the income gap on the sector.
- Involve Grant Writer to avoid stagnation in the innovative side.
- AI CRM in the for-profit and the need to regulate, future implications to the nonprofit.

**Systems in Place**

- A safe and open culture where the frontline providers can recommend solutions.
- A collective or one individual with an entrepreneurial mindstate.
- Correct definitions to assert the right strategy.

**Risk Factors**

- Adoption and maintenance are key for success.
- Recruit and develop staff to focus on data management and become super users.
**DATA ANALYSIS - Strategic Frameworks (Payne and Frow)**

**A Strategy Development Process**
This process requires a dual focus on the organization's **business strategy** and its **customer strategy**. Both need to interrelate to function.

**The Value Creation Process**
This is divided by value the customer receives or the value the organization receives and life value.

**A Multichannel Integration Process**
Takes the **physical** and **virtual** outputs of the strategy.

**An Information Management Process**
Collection and coalition of custom data from all customers contact point to generate customer insights and marketing responses.

**Performance Assessment Process**
This phase covers the essential task of ensuring the organization's strategies align to CRM terms being delivered to an appropriate and acceptable standard and that the basis for future improvement is established.

### LEVELS OF COMMITMENT

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<tr>
<th>Ownership</th>
<th>Buy-in</th>
<th>Understanding</th>
<th>Awareness</th>
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<td>- Demonstrated commitment to the process and the promotion of it.</td>
<td>- Agreement with the concepts and ideas presented.</td>
<td>- Demonstrated understanding of the process/product.</td>
<td>- Aware of process without necessarily understanding or supporting them.</td>
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<td>- Individual feel responsible and accountable for its success.</td>
<td>- Verbal expression of support.</td>
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SIX KEY DIMENSIONS IN CHANGE READINESS

LEADERSHIP
- Degree to which the leadership was committed to the vision, had strength and capability to drive through change to completion.

ORGANIZATIONAL DESIGN
- Degree to which the current organization structure, including job responsibilities, supported the achievement of the CRM vision.

CULTURE
- Extent to which the current culture was aligned with the change process and achieving ownership.

PEOPLE & STRATEGY
- Extent to which there was a two-way flow of information within staff, approach to build awareness, enthusiasm and commitment.
- Extent to which current skills and knowledge were relevant to achieving the CRM and identify issues and to manage the implementation of change.
- The extent to which current HR processes (recruiting, training) would support the CRM vision and drive new behaviors.

COMMUNICATION
- Extent to which there was a two-way flow of information within staff, approach to build awareness, enthusiasm and commitment.

HUMAN RESOURCES POLICIES, PROCESSES & SYSTEMS
- Extent to which current HR processes (recruiting, training) would support the CRM vision and drive new behaviors.

INDIVIDUAL & TEAM CAPACITY FOR CHANGE
- Extent to which current HR processes (recruiting, training) would support the CRM vision and drive new behaviors.

Foster a safe environment where staff can voice what is working for them. Re-evaluate and consider changing roles or processes.

Even if you need all the staff committed not all have the capacity. Try allocating them in a level of commitment that does not interrupt their purpose.

Get the team habituated to define the purpose, goals and key success factors of the project meshed with their mission.

Merge CRM strategy with the strategic plan. In the course of the design engagement, conduct field-research and in-depth interviews preferably with a human-centered design approach.

Think about how the implementation can empower staff and community avoid centering funding entities to acquire most of the focus.
IMPLEMENTATION OF CRM STRATEGY IN THE NONPROFIT SECTOR: TOOLKIT FOCUSED ON CHANGE MANAGEMENT TO ENHANCE ADOPTION
Sara Abdel-Rahman Lopez, MNA - Master of Nonprofit Administration - Capstone Project

SUMMARY
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 analysis how can achieve buy-in from staff taking in consideration the realities of the nonprofit sector.

PURPOSE
- **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.

RESEARCH
What are the current tactics to motivate adoption and ensure an effective transition to CRM technology?

METHODS
- Literature Review
- Three Expert Interviews
  - Michelle Reiss-Top, Data & Evaluation Director at MEDA
  - Zeina Saad, Sr Consultant at Exponent Partners
  - Dave Byrd, Sr. Advisor at Capacity Blueprint

DATA AND ANALYSIS
Qualitative Expert Interviews

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MODEL & RECOMMENDATIONS
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