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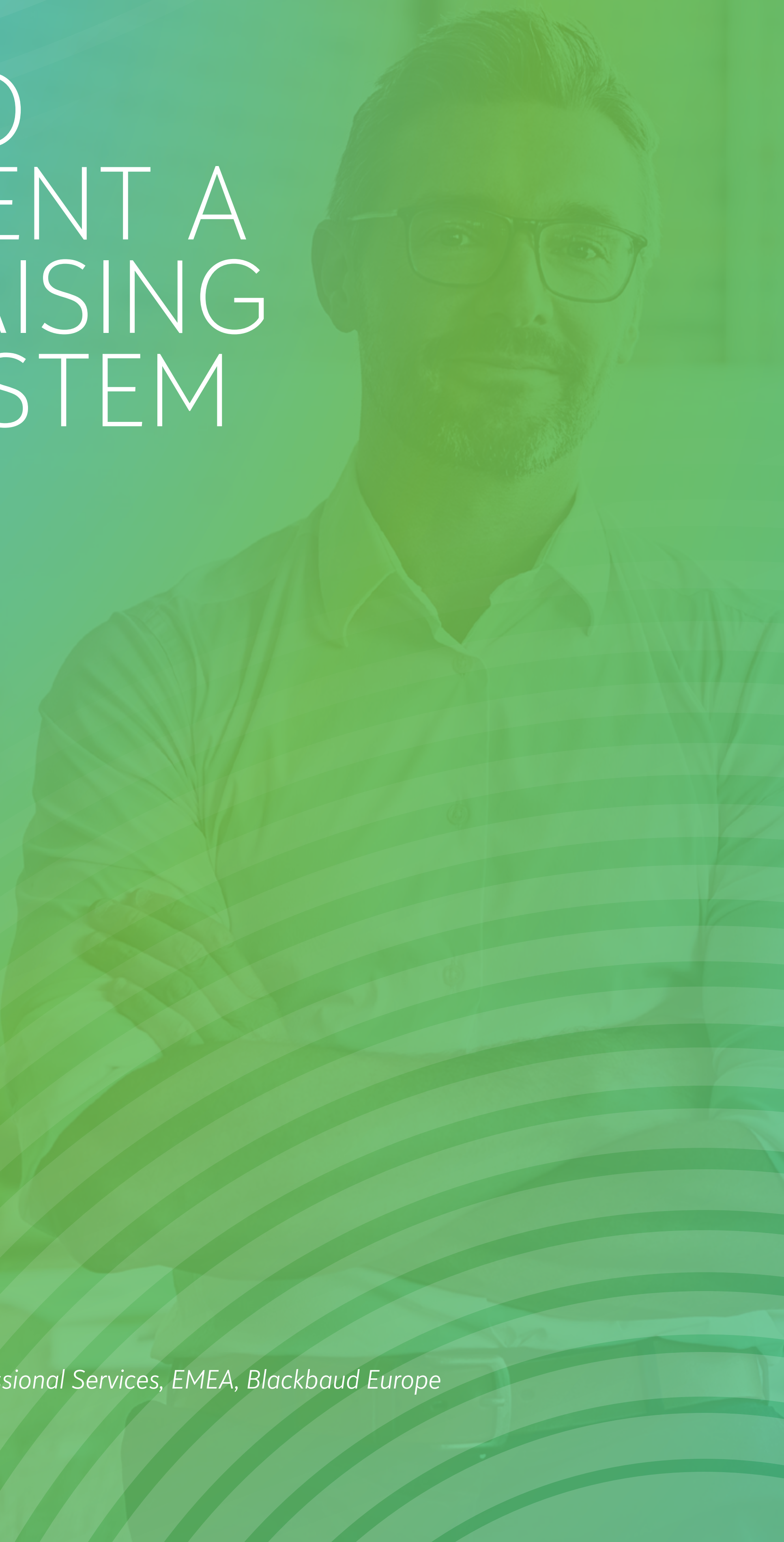
HOW TO IMPLEMENT A FUNDRAISING CRM SYSTEM



By Sarah Lowney, Director of Professional Services, EMEA, Blackbaud Europe

Introduction

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So, you've just bought a fundraising CRM system.

You may have spent a long time choosing between different systems, talking to different vendors, and doing research on the market, your requirements and what would best fit your needs.

You've probably spent months speaking with your board, discussing and presenting to the trustees, and you've definitely negotiated with the CEO and Finance Director to secure the budget you need for the solution you want.

Congratulations! Pat yourself on the back that much of hard work has been done.

This is the first step on an exciting and fulfilling journey that will help your organisation grow and develop.

Your implementation project is just about to start, be it a quick start with one or two of you planning to be up and running within a month, or a longer planned-out project with several months of activities coming up.

To be successful, you need to be prepared and ready to work with your new CRM partner, understand the full process from expectations to timelines and best of all – get your team and your organisation ready to start realising more success and more value from a new solution!

This publication outlines the different areas required in preparing and planning for your project implementation to ensure that you lay the foundation for success, and ultimately receive the best return possible on your investment.

Contents

1	Introduction
2	Section 1: What to Prepare and What to Expect
4	Section 2: Project Planning
6	Section 3: Implementation Phases
8	Section 4: Preparing for Go-Live
9	Section 5: You're Live! Maintaining, Optimising and Extending Use of Your New Solution
10	Appendices

SECTION 1:
WHAT TO PREPARE AND WHAT TO EXPECT

The key thing to remember throughout the whole process is that you are not alone! A good vendor will be there every step of the way to guide this process.

The very first thing you need to do is select or appoint a project manager/co-ordinator or simply a project lead – someone who will own the implementation and drive the project through to completion. This person does not need to be formally qualified – key attributes are organisation, motivation to succeed, and the ability to work with all your key stakeholders in this project. This individual will also need to be empowered to make decisions on behalf of your organisation.

Once in post, your lead should work on selecting the project team for the implementation. Depending on the size of your organisation, ideally this group will be comprised of several staff members from the various departments. At the very least they should be subject matter experts in your business processes, the data in your legacy system (if you have one) and your requirements for the new system.

If you have the staff available, the following roles will be helpful to make up your project:

- **Executive Sponsor** – usually a C-level executive, or member of the board
- **Project Sponsor** – the individual with ultimate responsibility for the success of the project
- **Project Lead** – responsible for the day to day details of the implementation
- **Data Owner** – current database administrator or manager, key for decision making
- **Subject Matter Experts (SMEs)** – team members involved directly in the implementation and representatives of key process areas
- **System Users** – members of the wider organisation who will need training or involvement in using the system

TOP TIP

Small team? Even just 1 – 2 people? Part-time staff?

Don't worry!

As long as your project lead understands the above, you are ready to go

Working with your vendor

Now that the deal has been signed your implementation will start with your chosen solution provider and it is likely that you will be handed over from the business development or sales representative you were working with when you selected your chosen system. Ask your contact at the vendor to provide you with details of who you will be working with going forward and ask for a face-to-face meeting or an initial phone call to speak to your project co-ordinator or project manager.

Before project kick-off

Before a formal project kick-off with your vendor, have an internal meeting with your project team. Brief them on the details of the project such as how long you anticipate the implementation might take, who is involved from your organisation, what support you might need from different departments such as IT, facilities, support. Work through a checklist of what you might need ahead of the project kick-off. For example:

- Will you have on site visits from your vendors or your implementation team?
- Do you need to have rooms available for these meetings?
- What IT setup do you need to prepare for the implementation?
- Are there remote staff who will need to join a teleconference?
- Do you need to organise travel or accommodation for anyone?

SECTION 2:
PROJECT PLANNING

You've selected your internal team and started to plan the implementation, so now it's time to collaborate with your solution partner and begin shaping and defining the project.

Your chosen partner should have experience of implementing hundreds of projects of all shapes and sizes. They should have deep and detailed sector knowledge and be familiar with organisations that are similar to yours. They will offer best-in-class, current and relevant best practice in the following areas:

- Training
- Consulting
- Technical Data Mapping
- Project Management

What to expect from your implementation partner:

Every implementation is a collaboration between your organisation and your solution provider. So, what should you expect from them?

- Regular weekly scheduled calls
- A detailed project plan, with milestones, dates and responsibilities
- Agendas for meetings or consulting sessions
- Advice on which pre-project training courses to attend
- Recommendations for your own internal planning
- Guidance on timelines

Before your solution implementation project starts it is likely that you will need to have some training in the software or the different aspects of the solution. Work with your project team on the vendor side to ensure that you have access to, and are signed up for, the correct training.

Again, work with your project team to ensure there is enough time to set up in advance, so they are able to undertake this training well in advance of the project start.

Keys to Success

Partnership and co-operation with your solution provider	Risk management	Good and frequent communication via an agreed communications plan	A clear understanding of your requirements and data - across the whole project team
Resource availability	Adoption of best practices	Preparation and careful planning	Governance meetings to review progress, risks and changes

Internal documents

You will also need to maintain your own set of internal documentation to manage and govern the implementation. Depending on the size of your project you will need some (if not all) of the following records:

1. **Risk and Issues Log**
   Set in the context of the wider organisation, how is the project progressing?
2. **Resource Planner for project team members**
   Up to date availability, holidays, key dates and blackout periods
3. **Internal Project Plan**
   Are there other considerations and dependencies for this project?
4. **Detailed RACI Matrix**
   Confirming and committing the roles and responsibilities of each team member
5. **Project Budget**
   How much have you spent against the agreed budget with the vendor? Do you have contingency and is it needed?
6. **Governance or Stakeholder Reporting**
   Dashboards, metrics and narrative progress report for reporting upwards to project sponsorship and organisation management

TOP TIP

Small team? Again – don't worry! Just keep one up to date document in Word, OneNote or Excel with note on all these areas as headlines, and remember some of them (such as Governance or Stakeholder Reporting) may not even be needed

TOP TIP

Not sure where to start? Ask your implementation partner for help, guidance and examples of documents. They should have done this many times previously

SECTION 3:
IMPLEMENTATION PHASES

Now is the stage of the project to visualise and confirm that go-live date with your solution partner. You will have a clearer idea of resource availability on both sides, the effort needed and the implementation details to help you assign roles and responsibilities according to availability. You may also have a date for your go-live in mind. Work closely with your counterpart on the vendor side to assess how much work is needed to get there and take note.

At this stage, you should begin documenting key items and risks to note that might affect the dates you agree when constructing the project plan with your vendor. For example:

- **Have you factored in times when resources might not be available**
  IT support, facilities such as meeting rooms or network availability?
- **Are there any organisation events that might impact on that timeline**
  Building work, office moves, other system implementations?
- **What is team availability like**
  Have all holidays been requested and logged? Have national holidays, term or peak dates been factored into the plan?
- **Have you accounted for risk**
  Staff attrition or sickness?

Your project implementation should adhere to a methodology (such as Agile, Waterfall etc.) and your solution partner will work with you to explain what that means and translate that into a sensible and easy to understand plan, accessible to everyone involved in the project. Broadly speaking, the project should run an iterative approach, grouped under four main areas:

1. **Planning and Kick off**
2. **Design and Map**
3. **Build and Test**
4. **Deliver and Support**

TOP TIP

Be realistic about the go live date. Remember the majority, if not all staff involved in this implementation also have their day jobs. Business as usual needs to run alongside this implementation, so be aware of time required balanced against resource availability when fixing the end date in the plan.

Stage	What to Expect	What to Prepare	Who is Involved?
Planning and Kick off	• A welcome or introduction call from your vendor project lead • Invitation for a project kick off meeting • Instructions on how to access any systems or training you need before the project starts • A detailed list of how to prepare for the kick off • Requests for availability and resource information	• Your resource availability information • A list of 'blackout' dates • Read through all contract documentation and have these to hand during calls and meetings • Access to a copy of your source data	• Project Lead • Executive Sponsor • Project Sponsor • Internal Support teams
Design and Map	• Sessions to work through how to set up the system and your business processes according to best practices • Mapping your source system data into the new system • Discussions on your specific process/data requirements • Written documentation or notes for review from vendor • Active participation in the sessions • Internal notes and documentation to be taken during sessions	• Current business processes – 'as is' documentation • Solution requirements • Reporting requirements • Current data structure • Solution training • Resource availability – schedule in everyone's diaries time to attend sessions • Organise Internal debrief and collation of notes following sessions	• Project Lead • Data Owner • Subject Matter Experts (SMEs)
Build and Test	• Solution partner project team to create iterations of your test database (between 1 and 3) • Iterations to be built in accordance with the agreed data map • Changes or issues to be logged after each iteration run and accounted for in the next • Receive each test database and clearly defined guidelines from your partner on what to test and how long the testing period is for	• Technical set up and access required for all users involved in testing • Project process documentation and logs for this element • Getting any new participants up to speed • Advanced solution training • Resource availability – schedule in everyone's diaries time for testing	• Project Lead • Data Owner • Subject Matter Experts (SMEs) • System Users
Deliver and Support	• Final iteration of your database • Advice and guidance on downtime and cutover planning • Go live sessions with your vendor project team • Introduction to ongoing relationship team • A full handover of all support resources	• Downtime. During final run, your source database should be 'switched off' and no new data entered . Alternatively, the database could still be switched on but in read-only mode during the cutover. • Cutover planning – how to store and log incoming data changes/ additions • Resource availability – schedule in everyone's diaries time to attend go live sessions • Roll out of the new solution across the wider team, then the organisation • Project debrief – internal • 'Lessons Learned' with project team from vendor	• All Project Team

SECTION 4:
PREPARING FOR GO-LIVE

You're almost at the finish line – go-live is on the horizon and the end is in sight. At this stage, it is key to maintain momentum to draw the project to a successful conclusion. Communication is critical at this point – ensure everyone involved in the project and all other stakeholders are kept aware of the impending go-live and crucially, what it means for them.

Brief the project team on:

- Source database downtime and cutover planning
- Recommended training courses to utilise the downtime period
- Tasks and activities involved in the cutover period – training and briefing system users on interim procedures
- Planning for any 'go-live' sessions with your vendor's project team
- Planning for the test and then roll out of the live system
- 90-day plan for the early days, whilst the system and new processes bed in

TOP TIP

Need advice on any of the above? Ask your implementation partner or solution partner who are there to support you now more than ever, as you approach go-live

SECTION 5:
YOU'RE LIVE! MAINTAINING, OPTIMISING AND EXTENDING USE OF YOUR NEW SOLUTION

You've reached the end of your implementation and you are now live on your new solution. This is a time of great excitement in your organisation, as you start to realise the return on the investment you made, both in budget and resource, in getting to this stage.

To fully maximise use of your new system, plan for the long term. If there is not an individual in the position already – appoint a Database Administrator or Manager. This person will be responsible for driving forward the optimal use of the new solution and ensuring the careful and thorough work that was undertaken in the implementation is maintained.

Also:

In addition:

1. Stay up to date: Attend user groups, sector and solution partner conferences, take advantage of peer networks, engage with the solution user communities
2. Access: Your vendor will have a wide array of both free and paid-for resources. Request full details of what is available once you go live
3. Relationship team: Once you are live on your new solution, there will be a team of people at the vendor dedicated to helping you get the most from your new system such as, Customer Success, Account Executive and Customer Support

APPENDICES

APPENDIX I - PROJECT CHECKLIST

Below is a list of key steps to get you thinking what you need to do before the implementation starts. Smaller team and smaller project? Not all steps will be applicable, but ensure you do the key pre-sale checks.

Action	Phase
Implementation or service delivery contract defined and agreed	Pre-Sale
Estimates provided	Pre-Sale
All internal parties have reviewed the service delivery contract	Pre-Sale
Initial project planning done internally	Pre-Sale
Date for project kick off agreed with implementation partner	Pre-Sale
Project team assembled and briefed; expectations made clear	Pre-Sale
Service delivery contract reviewed with implementation partner	Pre-Sale
Initial project plan reviewed with implementation partner	Post-Sale
Project planned out in detail with milestones and dates agreed	Post-Sale
Training planned and organised for all project team members	Post-Sale
Agendas for training and / or consulting sessions provided by implementation partner and agreed	Project Initiation
Risks and dependencies discussed and documented	Project Initiation
Internal RACI matrix agreed	Project Initiation
Dates for governance committee or check in meetings agreed	Project Initiation
Invitations for training and consulting sessions sent to all participants	Project Initiation
Regular update with implementation project manager agreed	Project Initiation
Facilities set up for training and consulting sessions	Project Initiation
Source / Legacy CRM data sent to implementation partner	Project Kick-off
Implementation kick off meeting with everyone	Project Kick-off

APPENDIX II – GLOSSARY

Agile A project management style, usually used in software development (not implementation) which takes an iterative approach, with the project progressing towards completion in small sections.

Waterfall An approach to project management where all planning is done upfront, with the project completed in distinct, linear phases.

Subject Matter Experts A person, or persons at an organisation that are experts in the area in which they work. They will usually contribute to specific elements of a project, participating and acting as a spokesperson on behalf of the processes undertaken by their team/department.

Downtime/Cutover The time between shutting down access to your legacy system and the go-live of your new system. You must plan carefully how to manage business as usual tasks for the period.

Solution Partner The vendor or solution seller you have chosen to provide your new technology solutions. You may also be working with the same partner for the implementation or partnering with a third-party organisation to deliver the implementation services.

Training The process of learning the new skills and knowledge required to use the functionality of your new CRM solution. This can involve training the project team at the start of the project in order to support implementation activities as well as training End Users before going live with the completed solution.

Consulting Expert advice delivered during the implementation, relating to your organisation's specific business requirements for using the CRM system.

RACI Matrix A way to assign responsibilities and roles in a project, so your team know who will be doing what. RACI stands for: Responsible, Accountable, Consulted and Interested.

Governance Establishing policies, processes and agreements – a governance group or committee will oversee and ensure adherence to what was agreed around system implementation.

Stakeholder Can be both internal and external, a stakeholder will have a vital interest in the implementation of a new system.

Contact us

If you have any questions on CRM solutions, would like to find out more about Blackbaud, or are at the beginning of the solution evaluation process and would simply find it useful to chat with a professional consultant, please contact us at solutions@blackbaud.co.uk

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