

“Free” as in “Kittens”: CiviCRM and Salesforce



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Our Intention Today



Strengthen your confidence in:

- 1) Knowing what you want when looking for a “free” CRM solution
- 2) Knowing what you don't want
- 3) Planning and taking steps via a few “standard approaches” using Salesforce and CiviCRM

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Key Terms



- SaaS: Renting the investment
- CRM: One of the main information systems
- VPS: Rent an imaginary server
- CMS: One way of communicating, scaffolding
- Drupal: Open Source CMS
- Free: Nothing
- Cloud: A way of computing, via the internet, that broadly shares computer resources instead of having local servers

- Open Source: “free as in speech”

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Sample Situations



- “I have all these systems but they don't play well together, there is a lot of manual work.”
- “We've got some \$ for some systems but we don't know what first or second steps to take.”
- “We've heard that solution 'x' is great but we're not sure why.”
- “We know what problem we are trying to solve, we researched the options, and made an informed decision.”



Introduction to CiviCRM



- What is CiviCRM?
 - Open Source
 - PHP
 - Web-based with CMS or Standalone
- What features does it have?
 - Donations, Events
 - Mail, Members
 - Cases, etc...
- What does “free” mean for CiviCRM?
 - Download to VPS, install, configure, no purchase

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Demo of CiviCRM



- Publicly available online demo at:
 - <http://drupal.demo.civcr.org>
- Module Review
- Administration Console
- Orgs vs Contacts
- Relationships & Activity
- Search
- Online Reg (with or without payment processing)
- Email Send
- Reports

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Extending CiviCRM



- Web enabling your data
 - Drupal or Joomla only
- E-commerce integration
 - Drupal Ubercart (shopping cart)
- Accounting Software
 - Quickbooks (in development)
- Extending = Modules & Custom Development

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Introduction to Salesforce



- What is Salesforce?
 - Commercial SaaS CRM
 - 4 levels: Unlimited, Enterprise, Pro, Group
 - Application Exchange, platform & ecosystem
- What features does it have?
 - Robust cloud based CRM
 - AppExchange (paid and free services)
 - Force.com
- What does “free” mean for Salesforce?
 - Setup trial, apply for grant, configure, migrate.

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Demo of Salesforce



- Trial (30 day) available, no demo
- Various versions (Standard, NPSP, etc.)
- Home Page
- Search
- Orgs, Contacts, Households
- Relationships & Activities
- Campaigns
- Donations
- Email Send & VR/CC integration
- Reports
- Demand Tools & APEX Data Loader

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Extending Salesforce



- Web enabling your data: Plone, Drupal or Joomla
- eCommerce: Drupal+Ubercart, numerous others
- Cloud-based data sync: Pervasive, Informatica, Boomi, Cast Iron
- Google Apps (email integration)
- Mass Email (in addition to native send capacity)
- Extending = Apps & Custom Development

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Salesforce vs. CiviCRM



- SaaS vs. Self-Managed
- Modified for Nonprofits as opposed to built for Nonprofits
- Company vs. Open Source Project
- Both work in open API space

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Salesforce vs. CiviCRM



- Customization options quite different
- Salesforce Applications (AppEx)
- Salesforce as development platform (APEX, Visual Force, force.com)

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Advantages and Disadvantages

Issue	Salesforce	CiviCRM
Is it Free?	Yes (first 10 seats)	Yes
Is it Open Source?	No	Yes
Does it offer an open API?	Yes	Yes (not as well developed)
Is your data yours?	Yes	Yes
Is your data private?	Yes (sort of)	Yes Yes (sort of)
System was designed for Nonprofit people?	No	Yes
Are there development platforms out there?	Yes (force.com)	Yes (PHP)
Is this a SaaS service?	Yes	No (sort of)
Integration with CMS?	Yes (Salesforce, Sites, Drupal, Joomla, Plone)	Yes (Drupal, Joomla)
Ease of customization?	Yes (very customizable)	Yes (not as flexible in reporting)
Online Help?	Yes	Yes
Online User Community?	Yes	Yes
Phone and email support?	Yes	No
Consulting Ecosystem	Yes (not as many with NP experience)	Yes (small)

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Support Layers

Support Layer Details			
Level	Name	Description	Details on Coverage
1	Triage	Client Interface, Initial Assessment, Routing & Tracking	First response, initial diagnosis, possible quick close, minimal troubleshooting, documentation of issue in ticketing and handoff to Sales or Ops.
2	Counseling	Problem troubleshooting, training, and content assistance.	Decision Support, Development, Change Management & Implementation, Development and Design assistance on content and system functionality.
3	Application	Drupal, Joomla, CiviCRM, Salesforce, Common Ground, UberCart,	Support on the following: <ul style="list-style-type: none"> - LAMP stack troubleshooting - CMS-related updates/troubleshooting* - CRM-related updates/troubleshooting* (* for both core and modules)
4	System	OS, Security	Support on the following: <ul style="list-style-type: none"> - Server admin of operating system - LINUX updates - Security Updates - Uptime monitoring via Nagios and CloudKick - Push notification
5	Backup	Backups	Setup and monitoring of recurring backups Quarterly backup testing
6	VPS	Hosting	VPS Service Liaison regarding: <ul style="list-style-type: none"> - Maintenance of VPS Account - Network and DNS Troubleshooting - Outage Management



Implementation



- Yes, you can implement both of these tools without purchasing any licenses.
- Implementing either of these tools requires a high level of data, system and software expertise.
- Trying yourself and making mistakes costs time.

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Expectations for Implementation

- Projects take 2-4 months and includes: data source discovery, functionality planning, customization, migration, training
- Cost is \$5k and upwards
- Implementation = Migration = Cleaning = Consolidation
- CiviCRM: Budget \$5 k/year for maint of CiviCRM and CMS
- Salesforce: Budget \$1-3 k/year for support & data support

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Suggestions for Implementation



- Both:
 - Have clear goals, especially around process
 - Allocate a transition manager
 - Take note of new dependencies
 - Find and become part of the ecosystem
 - Multi departmental perspective is critical to adoption.
- For Salesforce:
 - Consider linking Google Apps
 - Consider a relationship with a good data consultant
- For CiviCRM:
 - Use a VPS
 - Consider a relationship with a good Drupal/Joomla consultant

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People we know



CiviCRM Resources:

- CiviCRM.org (CiviCRM)
- DharmaTech.org (CiviCRM Development)

Salesforce Resources:

- Salesforcefoundation.org
- Groundwire.org (Plone/Salesforce)
- PicNet.net (Joomla/Salesforce)
- Jazkarta.com(Plone/Salesforce)

Other Resources:

- Aspirationtech.org (all software)
- Idealware.org (software reviews)

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Questions and Answers



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Thanks!



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