

Manage Your Constituent Information with Ease

NTEN Webinars 2008

Facilitated by: Eric Leland, FivePaths

Introductions



Eric Leland
FivePaths
fivepaths.com

Me!

Our Focus Today

1. CRM Defined
2. Why CRM?
3. Example Systems
4. How to Choose
5. Resources

CRM Defined

CRM:

- Constituent / Customer / Contact
- Relationship Management

A STRATEGY for organizing information about people.



CRM Software

Helps to organize:

- Contact information
- Relationships between People
- Participation in Activities

One UNIFIED VIEW of most people information across your organization



Do I Already Have A CRM?

Maybe. Is it one, unified system used..

- ...by all staff consumers and producers of people information?
- ...to track all roles and activities people have with your organization?
- ...to message groups of people by role and activities?

Plans before tools

Planning – explain yourself!

- clearly articulate mission and goals
- explain strategies for achieving goals
- define success and its measurements



Plan for Sustainability

How much technology can you afford?

- Budget for technology
- Technology staffing and support
- One time and ongoing costs
- Obsolescence



What Data Do You Need?

Define Information to Collect and Report

- Track only what you will use
- Track only what you can collect
- Describe how you need to see the data
- Talk to all future users of the system



Exploring CRM tools

CRMs come with many facets

- Install: local/hosted/service
- License: proprietary vs open source
- Build: finished, framework, custom
- Specialty: donor, events, payments, etc
- Costing: free, contract, license
- Support: none, community, paid



Integrated CRM Tools

Donation Account Event Reports **Communication** Store Time Sheet System My Account Document Fundraise Welcome Eric Leland

Email Audiences :: Campaign Emails :: Mail Merges :: Email Status Monitoring :: Email Statistics :: Material Tracking :: Activity :: Survey

Database Search
 Search name, ID or email:

[Advanced Search](#) [Full Search](#)

Recent Activities
 [08/22 - Donation Update for Eric Leland](#)
 [08/22 - Donation Creation for Eric Leland](#)
 [08/22 - Donation Creation for Eric Leland](#)
[More...](#)

Web Links
[Forum](#)
[SFBC](#)

Live Support
 >>>> OFFLINE
 LEAVE A MESSAGE!

Tip of the day: Create discounts for your members for events and in the store. ✕

Communication: Home

▼ **Mail-Merge Reminder** Filter by Email Type:

No Mail Merges needed

▼ **Recent Email Campaigns**

Action	Template	Status	Target Broadcast Date	Complete Date	Total Emails Sent
View Results	116	Succeed	04/23/2008	04/23/2008	21


▼ **Email Audience List †**

Action	Name	Creation Date	Active #	Errored #	Unsubscribed #
Edit Delete	All Emails	11/13/2005	203	0	0
Edit Delete	test2010	08/03/2006	1	0	0
Edit Delete	test	05/10/2006	1	0	0
Edit Delete	Test2	11/13/2005	7	13	0
Edit Delete	ats event registrants	06/30/2006	0	0	0
Edit Delete	Selen ATS	06/29/2006	20	0	0
Edit Delete	tst	06/29/2006	20	0	0
Edit Delete	ttr	05/15/2006	3	0	0
Edit Delete	people in IL	11/14/2005	13	0	0
Edit Delete	Betsy list	04/01/2006	0	0	0

† The total count of Active, Errored and Unsubscribed emails was captured when the email audience was last accessed.

[Home](#) | [Accounts](#) | [Donations](#) | [Events](#) | [Calendar](#) | [Reports](#) | [Communication](#)

Generic CRM



Strategy • architecture • standards • optimization • metrics

Welcome, Eric [[Logout](#)] | [My Account](#) | [Employees](#) | [Admin](#) | [Training](#) | [About](#)

Sitemap |

[Home](#) | [Dashboard](#) | [Calendar](#) | [Activities](#) | [Contacts](#) | [Accounts](#) | [Campaigns](#) | [Leads](#) | [Opportunities](#) | [Projects](#) | [Cases](#) | [Bug Tracker](#) | >>

Last Viewed: [Set up base Drupal](#) | [AFTA.org](#) | [afta.org CMS](#) | [CMS Overhaul](#) | [Asian Pacific Fund](#) | [capsonoma.org CMS](#) | [Youth Together](#) | [Nicole Branch](#)

Shortcuts

- Create Contact
- Enter Business Card
- Create Account
- Create Lead
- Create Opportunity
- Create Case
- Report Bug
- Schedule Meeting
- Schedule Call
- Create Task

New Contact

First Name:

Last Name: *

Office Phone:

Email:

Assigned to: *

[? Help](#)

My Calls ↻ ↺ ✕

(1 - 1 of 1)

Close	Subject	Duration	Start Date	Accept?
✕	Initial Prospect Call	1h00m	11/13/2008 10:00	Accepted ↻ ↺ ✕

My Meetings ↻ ↺ ✕

(1 - 1 of 1)

Close	Subject	Duration	Start Date	Accept?
✕	Scoping	1h00m	11/14/2008 13:30	Accepted ↻ ↺ ✕

My Leads ↻ ↺ ✕

(1 - 1 of 1)

Name	Office Phone	Date Created
Patrick Donohew	415-310-2050	11/19/2008 09:23 ↻ ↺ ✕

My Accounts ↻ ↺ ✕

(1 - 5 of 9)

Account Name	Phone	Date Entered
Madera Group	510-883-9998	11/13/2008 09:34 ↻ ↺ ✕
University of California Berkeley	510-642-3947	11/13/2008 09:52 ↻ ↺ ✕
Asian Pacific Fund	(415) 433-6859	11/13/2008 10:04 ↻ ↺ ✕
American Family Therapy Academy	510-549-0598	11/13/2008 11:37 ↻ ↺ ✕
Valley Vision	916-325-1630 x221	11/13/2008 12:08 ↻ ↺ ✕

My Open Cases ↻ ↺ ✕

(0 - 0 of 0)

Number	Subject	Priority	Status
--------	---------	----------	--------

My Top Open Opportunities ↻ ↺ ✕

(1 - 5 of 8)

Opportunity Name	Amount	Expected Close Date
Web Video Archive: CMC	\$20,000.00	12/31/2008 ↻ ↺ ✕
Web Citation Database	\$40,000.00	12/31/2008 ↻ ↺ ✕
CMS Overhaul	\$11,000.00	12/31/2008 ↻ ↺ ✕
capsonoma.org CMS	\$35,000.00	12/31/2008 ↻ ↺ ✕
Donor DB Report	\$8,000.00	12/31/2008 ↻ ↺ ✕

JotPad ↻ ↺ ✕

Double click below to Edit.

Welcome to Sugar 5.1!

Click the **My Account** to set your preferences.
Click the **Question Mark** icon to access the Help page for each module.

For assistance with getting started, click the **Training** link to find out about training offered through **Sugar University**.

CRM Terminology

FivePaths
strategy • architecture • standards • optimization • metrics

Welcome, Eric [Logout] | My Account | Employees | Admin | Training | About

Sitemap | Search

Home | Dashboard | Calendar | Activities | Contacts | Accounts | Campaigns | Leads | **Opportunities** | Projects | Cases | Bug Tracker | >>

Last Viewed: Set up base Drupal | AFTA.org | afta.org CMS | CMS Overhaul | Asian Pacific Fund | capsonoma.org CMS | Youth Together | Nicole Branch

Shortcuts

- Create Opportunity
- Opportunities
- Import

Create Opportunity

Opportunity Name: *

Account Name: *

Expected Close Date: *

Sales Stage: *

Probability (%):

Amount: *

Assigned to: *

Save

Opportunities: Home [Print](#) [Help](#)

Basic Search | **Advanced Search**

Opportunity Name Amount Expected Close Date

Probability (%) Next Step Lead Source

Sales Stage Assigned to Account Name

Prospecting
Needs Analysis
Value Proposition
Proposal/Price Quote
Negotiation/Review
Closed Won

admin
eleland
jpsalter

External Website
FivePaths Website
Existing Customer
Word of Mouth
Conference

✓ Saved Search & Layout

Search | Saved Searches --None--

Opportunity List

Select Selected: 0 (1 - 3 of 3)

Name	Account Name	Sales Stage	Amount	Close	User
<input type="checkbox"/> CMS Overhaul	Asian Pacific Fund	Negotiation/Review	\$11,000.00	12/31/2008	eleland
<input type="checkbox"/> Donor DB Report	Idealware	Negotiation/Review	\$8,000.00	12/31/2008	eleland
<input type="checkbox"/> Web Citation Database	University of California Berkeley	Negotiation/Review	\$40,000.00	12/31/2008	eleland

Select Selected: 0 (1 - 3 of 3)

Segmentation

The screenshot displays the Five Paths CRM interface. At the top, there is a navigation menu with options like Home, Dashboard, Calendar, Activities, Contacts, Accounts, Campaigns (selected), Leads, Opportunities, Projects, Cases, and Bug Tracker. A search bar is located in the top right corner.

The main content area is titled "Campaigns: Home" and features an "Advanced Search" section. This section includes input fields for Name, Start Date, End Date, Status (with a dropdown menu showing options like Planning, Active, Inactive, Complete, In Queue), Type (with a dropdown menu showing options like Telesales, Mail, Email, Print, Web), and Assigned to (with a dropdown menu showing users like admin, eleland, jpsalter).

Below the search section is a "Campaign List" table. The table has columns for Campaign, Status, Type, End Date, and User. There are buttons for "Select", "Delete", and "Export" above the table, and a "Selected: 0" indicator.

At the bottom, there is a "Mass Update" section with an "Update" button and input fields for Assigned to, End Date, Type, Start Date, Status, and Frequency.

Integrated CRM Tools

The screenshot displays the Salsa CRM dashboard with a navigation bar at the top containing tabs for dashboard, supporter management, email blasts, advocacy campaigns, donation management, surf web features, turf people/places, and reports & statistics. A search bar is present with the text "Cleaner, more intuitive navigation".

The main content area is titled "web FEATURES" and contains several widgets:

- surf's up:** A text box explaining how to help supporters with pages to inform, engage, recruit, and interact. It lists actions like creating sign-up pages, e-postcards, surveys, and thank-you pages.
- recent postcards:** A table listing postcard subjects and their keys.
- recent surveys:** A table listing survey keys, chapter keys, titles, and descriptions.
- quicktips! website:** A section with links to various tips and guides, including "Online Messaging", "Viral Marketing", "e-Postcards", "Sign-Up", "Surveys & Questionnaires", and "How to Use Directories".
- signup page traffic:** A table showing traffic data for various signup pages.

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Search name, ID or email:

Search

[Advanced Search](#) [Full Search](#)

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Edit Delete	ats event registrants	06/30/2006	0	0	0
Edit Delete	Selen ATS	06/29/2006	20	0	0
Edit Delete	tst	06/29/2006	20	0	0
Edit Delete	ttr	05/15/2006	3	0	0
Edit Delete	people in IL	11/14/2005	13	0	0
Edit Delete	Betsy list	04/01/2006	0	0	0

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Frameworks

The screenshot displays the CiviCRM 2.1 Demo Site interface. The top navigation bar includes the CiviCRM logo and the text "CiviCRM 2.1 Demo Site". Below this, a breadcrumb trail shows "Home > CiviCRM". The main content area is titled "CiviEvent" and features an "Event Summary" section with a help icon, a globe, RSS, calendar, and iCal icons, and buttons for "Manage Events" and "New Event".

The central part of the interface is a table listing events with columns for Event, ID, Type, Public, Date(s), and Participants. The table contains five rows of event data.

Event	ID	Type	Public	Date(s)	Participants
blabla	5	Workshop	No	December 10th, 2008 to December 11th, 2008	: 0 Registered/Attended/No-show/Cancelled/Pending: 0 (max 50)
Fall Fundraiser Dinner	1	Fundraiser	Yes	September 21st, 2008 to September 21st, 2008	: 0 Registered/Attended/No-show/Cancelled/Pending: 18 (max 100)
Summer Solstice Festival Day Concert	2	Performance	Yes	June 21st, 2008 to June 21st, 2008	: 0 Registered/Attended/No-show/Cancelled/Pending: 20 (max 50)
Rain-forest Cup Youth Soccer Tournament	3	Fundraiser	Yes	May 27th, 2008 to May 29th, 2008	: 0 Registered/Attended/No-show/Cancelled/Pending: 12 (max 500)
test	6	Conference	No	December 10th, 2008	: 0 Registered/Attended/No-show/Cancelled/Pending: 0 (max 20)

Below the event table is a "Recent Registrations" section with a table listing individual registrations:

Participant	Event	Fee Level	Fee Amount	Event Date(s)	Status	Role
Adams, Peter	Fall Fundraiser Dinner	Single		September 21st, 2008	Registered	Attendee
Grant, Melinda	Fall Fundraiser Dinner	Single		September 21st, 2008	Attended	Host

The left sidebar contains a "CiviCRM" menu with options like "CiviCRM Home", "Find Contacts", "Manage Groups", "Import", "CiviContribute", "CiviPledge", "CiviMail", "CiviMember", "CiviEvent" (with sub-options like "Find Participants", "Manage Events", "New Event", "Import Participants", "Manage Price Sets"), "CiviGrant", "Administer CiviCRM", and "Log out". There is also a "Contact Search" section with a search box and "Advanced Search" link, and a "CiviCRM Shortcuts" section.

More CRM Tools

Additional tools used by nonprofits

- Metrix
- SageCRM
- FreeCRM
- Salesforce.com
- GiftWorks
- Organizers Database



Explore Your Surroundings

Did someone else solve your problem?

- Learn from other similar organizations
- Ask staff if they have been through this
- Discuss your situation on techsoup.org
- Rediscover your existing system
- Tap your board for resources

Evaluate Several Options

Get clarity on what packages fit best

- Explore solutions clearly out of range
- Explore solutions too limiting
- Get a custom quotation
- Consider a consultant to narrow options



Can You Use It?

Making sure it works for your team

- Practice using demos
- Test the help resources
- Navigate the screens
- Time common activities
- Involve many future users



Who said users don't matter?

Strategies for success

- Plan
- Share what you learn with your peers
- Try before you buy
- Involve your users
- Avoid reinventing the wheel
- Start small, achieve success, then scale



Resources

- Idealware.org
- TechSoup.org
- NTEN.org

Questions?
