It's More Than Just Software:

Defining the Meaning of CRM Implementation Success

Or where am I going? How will I know when I get there? Who's driving?

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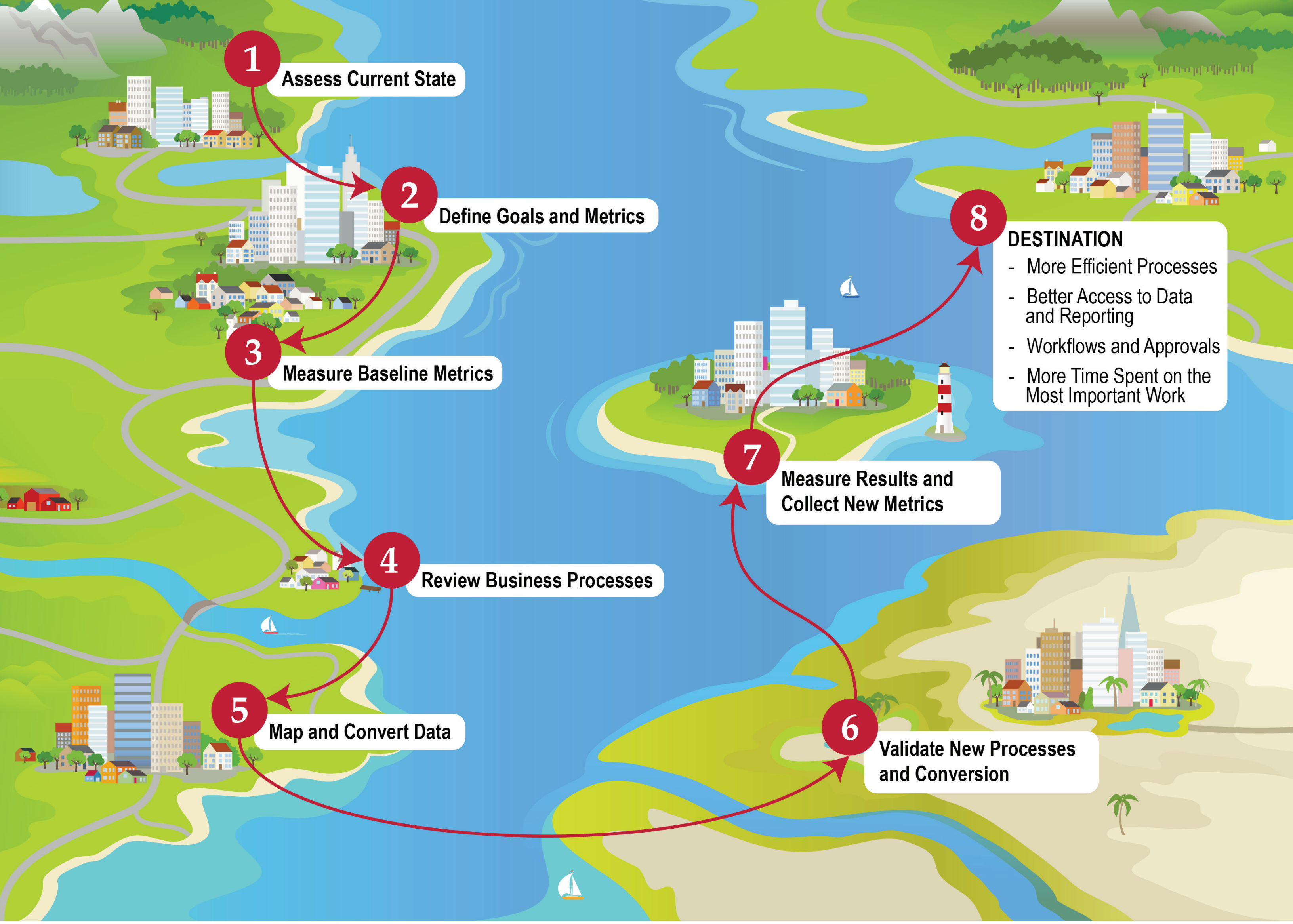
Whether your institution is just beginning to consider transitioning systems or embarking on the final phase of its implementation, defining what qualifies as success will be critical to driving the project and ensuring the new CRM meets institutional expectations and requirements. In a way, implementing a new CRM database holds many similarities to planning a trip, and with the time, effort, and money spent on an implementation project, institutions cannot afford to find themselves traveling towards an unforeseen end goal. So how does an institution strategically define and measure the success of an implementation to ensure not just an on-time and on-budget cutover but also that the system implemented will meet the current needs of fundraising initiatives and provide the foundation needed to grow and expand philanthropic priorities in years to come?

A good way to begin is to ask why this journey or project is necessary. Identify the reasons, figure out what the destination looks like, and define how to know you've arrived. It's like drawing a map—a map to specific areas of improvement. These areas are places that will define the route and help determine the destination.

There is no question there are risks inherent in planning a project of this size and scope—whether you are implementing a multi-million-dollar enterprise solution or a smaller targeted advancement CRM. The following are critical milestones to hit as your institution prepares in order to ensure that you get to where you intend to go.



Where is "There" and Why Are We Going on this Journey?

Assessment of Business Processes and Systems

This can be a combination of internal items and those that affect your external audience, your donors, prospects, alumni, and other constituents.

Why We're Going

Here are some examples of concerns and areas of opportunity that might drive an institution toward a new system implementation.

- We need better functionality: our current system no longer meets our business needs, it is difficult to integrate with other systems, we are continually building workarounds to accommodate high-priority needs.
- We want better access and use by internal and/or external users.
- We want ease of use, configuration, and extensibility.
- We want better communication with our audience.
- We need better pictures of what we've done and what we have (reporting challenges).
- We need to forecast and plan for the future.

What Does "There" Look Like?

Strategic Planning and Identification of Goals

Take the needs and wants from above and make them goals. There can be "aspirational" or "pie in the sky" goals as well. Users have weighed in on what they need and want, so now determine how to turn the various requirements into achievable goals.

- The new system will have greater functionality that meets our business needs; it will integrate with our other systems, and our high-priority work will be easier to accomplish.
- The new system will provide ease of access and use by our internal and external users.
- The new system will be flexible and allow us to grow and adapt.
- The new system will allow us to engage with our audience in meaningful, strategic ways.
- The new system will provide access to data and information in a relevant, timely manner.
- The new system will allow us to more easily share data and information within the institution.
- The new system will provide new functionality where needed.

How Do We Know When We've Arrived?

Measuring Reality Against Expectations

Going live is not just about firing up the system. It's about knowing you have reached the place you set out to achieve. This is where you need to be able to measure where you came from and where you are.

Are Most Processes Faster or Easier?

- You should conduct pre-implementation benchmarking so you can truly compare. A process that took two weeks using the legacy ystem and related business processes now only takes one, for example. (But if you didn't know that it was taking two weeks before, it is going to be hard to tell or prove that now it's better.)
- There can also be a subjective component to this measure. How do users feel about their work in the new system? Pre- and post-implementation surveys can tell you this.

Have Barriers to Providing Information to Users or Service to Customers Been Removed?

- What does user adoption look like? How many internal and external users are getting into the new system? What parts of the system are being accessed? Is information being updated? Are users using the system as imagined or intended?
- Have desired new features and functionality been realized?

There are also really obvious questions to ask, and they are taken for granted, but the are critical. These are the equivalent of, ***"Does the Car Run?"***

- Can I conduct my basic business processes (can I enter gifts, can I enter a contact report, can I record event attendees)?
- Can I run reports and get accurate results?
- Can users enter and access the relevant information they need to do their jobs?
- Did my data convert accurately (right locations, usability is accurate)?
- Are required integrations working accurately?
- Is security set up to enable users to do their jobs or prevent them from accessing data or processes they should not?

How Can I Stay at My Destination Once I've Arrived?

Ongoing System Support and Maintenance

Now that you've arrived, how can you sustain your satisfaction with your system and business processes? These items focus on strategic growth and continued success.

- Do I have a process in place for evaluating when/whether new tools are needed?
- Do I have a way to integrate with more systems, should I need to (do I have the in-house talent, do I have a plan to partner with someone to manage this)?
- Do I have a budget for data maintenance or to supply future enhancements?
- Do I have data maintenance strategies in place?
- Do I have a way to keep an eye on changing or new user needs, such as an internal user group or system administration committee?

The ultimate goals of all of this planning and effort are better donor relationships and donor trust in your institution's ability to carry out its mission and steward contributions. A CRM implementation project takes time, effort, and money. It only makes sense to understand and define specifically the goals of the project and how to measure them. Institutions often become so focused on getting to go-live that we miss the core reasons why we initially embarked on this journey. While successfully making it to that target date and launch is certainly critical, a CRM implementation project won't achieve the benefits that were used to justify the investment until the users have adopted the new system and are running their processes with success. Internal and external stakeholders have critical input into the true value of the new system: are our processes better, can we accomplish more things, have our new systems and processes allowed us to concentrate on the work that is most important?

To learn more about ensuring your institution is ready for implementation and defining what success means to you, join Katrina Klaproth, BWF COO and President of Philanthropic Services, on August 15, 2019, at 12:00 noon Central, for BWF's Facebook LIVE show as she interviews two institutions who have faced this journey and came out on the other side.

BWF is a full-service philanthropic consulting firm serving clients across the country and globally. For more information on developing specific strategies for your organization's upcoming or current system implementation, contact Wendy Jaccard, BWF senior associate, at wjaccard@bwf.com.