

# GUIDING THE WAY

## A CHARITY'S PATH TO CRM SUCCESS

### CHALLENGE

Our client realized their CRM system was no longer up to the task. After a period of rapid growth, they had simply outgrown its capabilities. It was evident that the current system couldn't keep pace with their evolving needs and was unlikely to support their ambitious plans for further expansion.

They had a couple of false starts trying to kick off this project but struggled to gain traction. As a charitable organization, they were keen to avoid any mistakes that could waste their precious funds.

### PROVEN PERFORMANCE

75+ SUCCESSFUL PROJECTS

15+ CLIENT ACCOUNTS

40+ YEARS EXPERIENCE

### PROCESS

We began with bite-sized consultancy to determine the best framework for their project, considering their size, complexity, and growth plans. We delivered a structured analysis approach, helping define a clear scope statement and co-delivering a detailed scope document. This ensured everyone was aligned on the project's goals.

A thorough stakeholder analysis identified and assessed all parties affected by the change, ensuring comprehensive requirements gathering and providing essential information for training and testing during implementation. This set the stage for a smooth transition and successful outcome.

We integrated the analysis approach with their emerging procurement strategy, guiding them on essential elements for technology procurement. Our tailored approach provided a bespoke process, including RFI, due diligence, and RFP templates, a custom scoring system, and a tool to generate scores.

To support the analysis and procurement, we brought in a skilled business analyst from our embedded resource solutions. She quickly identified relevant business processes, documented them in a process hierarchy, and worked with stakeholders to understand the 'as-is' state, identify pain points, and develop their ideal 'to-be' state.

She facilitated workshops and one-on-one conversations to document and validate high-level requirements, which later evolved into detailed user stories for implementation and testing.

These requirements were crucial for the procurement process, enabling each vendor and solution to be measured against specific needs. We supported the entire selection process, providing content for vendors, identifying due diligence questions, liaising with vendors, facilitating scoring sessions, and supporting conversations around the results.

### OUTCOME

The benefits were clear: our client could select a new CRM based on their unique needs. They made the decision with confidence, knowing that all user groups' needs were understood and considered. Our approach provided them with a robust, evidence-based decision-making process and an impartial, knowledge-based selection, ensuring they were investing their funds wisely.

The entire process was meticulously documented, with clear evidence and decision points. This was crucial for this charitable organization, ensuring audit and accountability requirements were met.

### BENEFITS

- Confidence in selecting a CRM based on actual needs
- Assurance that all user groups' needs were understood and considered
- Robust, evidence-based decision-making process
- Impartial, knowledge-based selection
- Wise investment of funds
- Thorough documentation for audit and accountability purposes