

Benefits map for CRM Programme

Enablers

Improved systems integration
 Identify where we generate most "value" from integration - what needs fixing
 Enable systems to talk to each other (e.g. actions in dotmailer written back to CRM)
 Marketing analysis, and automation tools enabled
 CS database is able to link into this data base
 Replace fast stats - one system for all purposes
 Understand various touchpoints of new and existing systems

Simplified processes and best practice
 Letter generation and other outputs sent to supporters
 Document (as lightly as possible) current processes so they can be improved.
 Supporting the business process re-design
 Need to ensure correct financial coding at start of process
 Cross-organisational process to manage each supporter holistically (tailored/personalised journey)
 Ability to change status of journey without overwriting historical engagement
 Ability to append and select from behavioural data to drive journeys
 Identify best solution for paper based data eg DD and Gift Aid and linking to an individual
 Be prepared to change processes
 All teams agree on and collaborate on management of the relationship

Improved efficiency and effectiveness of services
 Change management process
 Staff training on automated data entry and initial set up
 Expanded skillset and emphasis on digital marketing
 Right people in right roles
 Staff training on going support
 JDs changed to reflect new system and processes

Improved data analysis, insight and reporting
 Consistency in data appending/segmentation
 Easy to build queries and reporting so teams can build reports
 Data visualisation and reporting tools
 Report templates prepared and available for majority use
 Ability to design reporting tools giving view of performance in real time
 Collaboration with users to gauge what info is useful for reporting
 Training on how to use the data and how to write reports

Improved data governance
 Universal data spec - single way of mapping data segmentation
 Governance around contact type and frequency
 Simplified campaign source codes and attribution
 Agreed inclusions in profile
 Clear, documented decisions
 Agreed data definitions

Provider and support contract management
 Provider or IT dept able to set up new services quickly/cheaply
 Appropriate technical support
 Support/maintenance and change processes defined early on
 Industry recognised tech stack

Better data capture, data management and improved data quality
 Systems that enable us to update data regularly and easily - de-duping
 Reduce no. stakeholders needed to append attribution coding to records
 Improving data management skills
 Resource to ensure all historical data can be uploaded onto the system

Data protection, privacy and security
 Data Protection by Default as a key approach in the project
 Introduce multi-factor authentication for all users
 Data 'rules' documentation of key DP approaches
 Head of Compliance and DPO key stakeholder in project

Engagement in development
 Will need backfill for staff expertise
 User testing vital
 Engagement/usage organisation wide
 Cost benefit a key process outcome
 Ensure scope creep is prevented

Modern, supported, future-proofed system
 Integration with existing Office tools e.g. Office365
 CRM is user friendly and info is easy to access
 CRM used by other orgs that will be updated
 Training and inductions consistent for all users
 Cost of named user licenses as opposed to one or two

Primary Outcomes

Simplified processes

Improved supporter experience

Improved productivity

Reduced risk

Improved value of data

Secondary Outcomes

Simplified processes, fewer handovers

Improved efficiency and effectiveness of services

Ability to automate "journeys" and link across systems

Complete enhanced contact profile

Complete view of communications and interactions

Improved ability to self-serve

Improved systems integration

Easier to use systems

Modern flexible future-proofed CRM and data warehouse

Reduced dependency on key individuals

Improved data protection, privacy and security

Improved data quality and consistency

Improved reporting and insight capability

Easier data entry, access, use and management

Improved data entry

Benefits

Improved income generation opportunities

Improved supporter experience

More agile in taking opportunities

More engaged audiences

Improved evidence / data-based decision making

Improved staff experience

Assured compliance

Strategic Alignment

Supporting humanitarian action
 Influencing for change
 Mobilising resources

Key:
 CRM Programme Outcome
 Process Change
 People Change
 Technology Change