

# **Ready, Fire, Aim**

January 28, 2014

Tracy Kronzak  
Robert Weiner



# Where We're Going

- Us (5 minutes)
- You (goals for the session) (10 minutes)
- Selection dos and don'ts (35 minutes)
- Surviving implementation (20 minutes)
- Q&A (20 minutes)



Image: [Marcelo Nava](#)

# Ready, Fire, Aim: Tales of 6 Nonprofits

- Nonprofit A bought their database because it's cloud-based.



Image: [Georgie Sharp](#)

# Ready, Fire, Aim: Tales of 6 Nonprofits

- Nonprofit B bought their database because it's NOT cloud-based.



# Ready, Fire, Aim: Tales of 6 Nonprofits

- Nonprofit C bought their database because the (really, really charming) sales person gave them a great deal.



# Ready, Fire, Aim: Tales of 6 Nonprofits

- Nonprofit D bought their database because everyone knows it's "the best."





# Ready, Fire, Aim: Tales of 6 Nonprofits

- Nonprofit E bought their database because an international charity (which is 1000 times the size of Nonprofit E) uses it.



Image: [Automania](#)

# Ready, Fire, Aim: Tales of 6 Nonprofits

- Nonprofit F bought their database because the board chair read about it in an in-flight magazine.



Image: [Hyougushi](#)



# So why is this so F\*#@!g Complicated?!



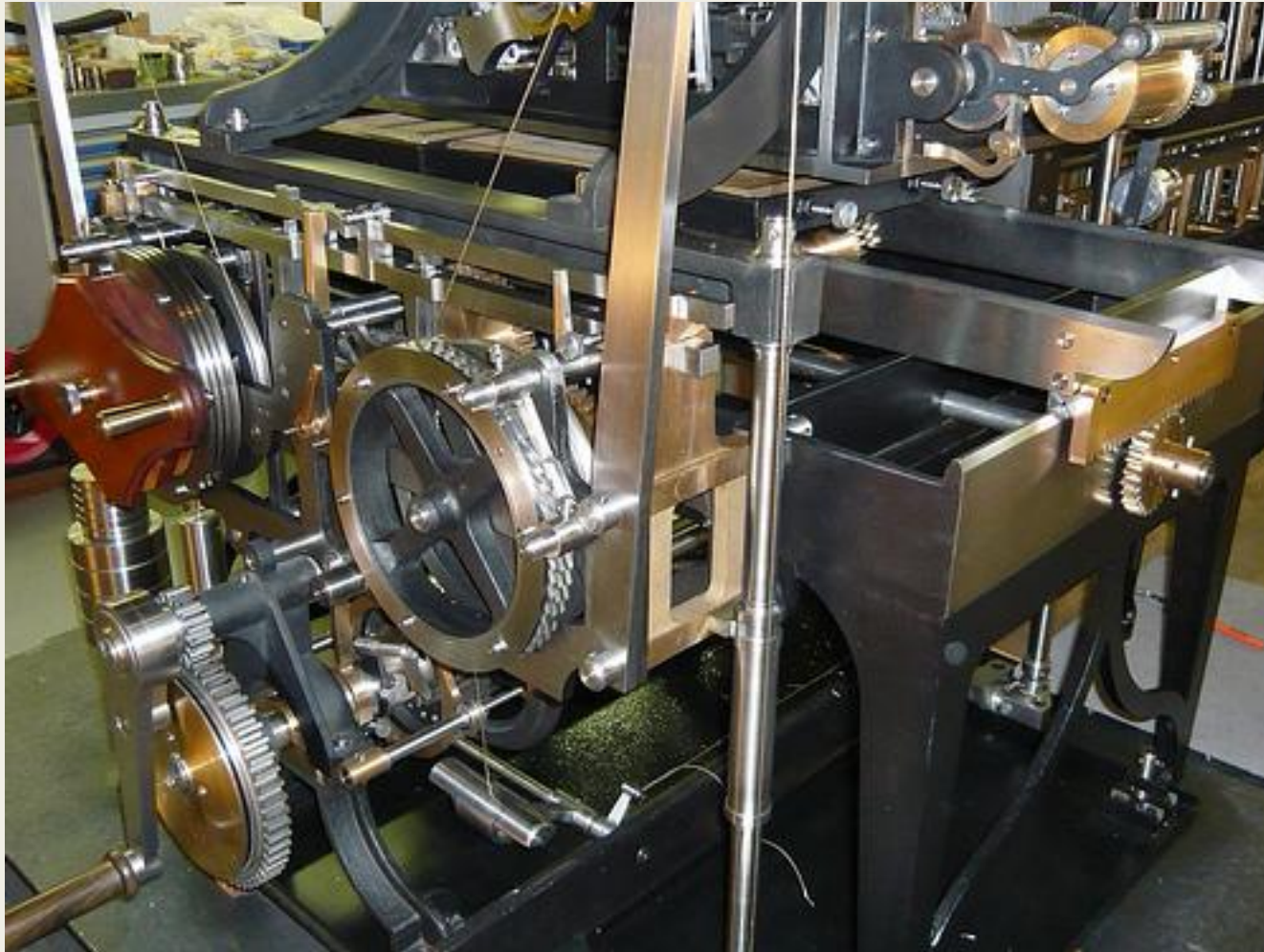
Image: [Marc Brakels](#)

# It's Therapy



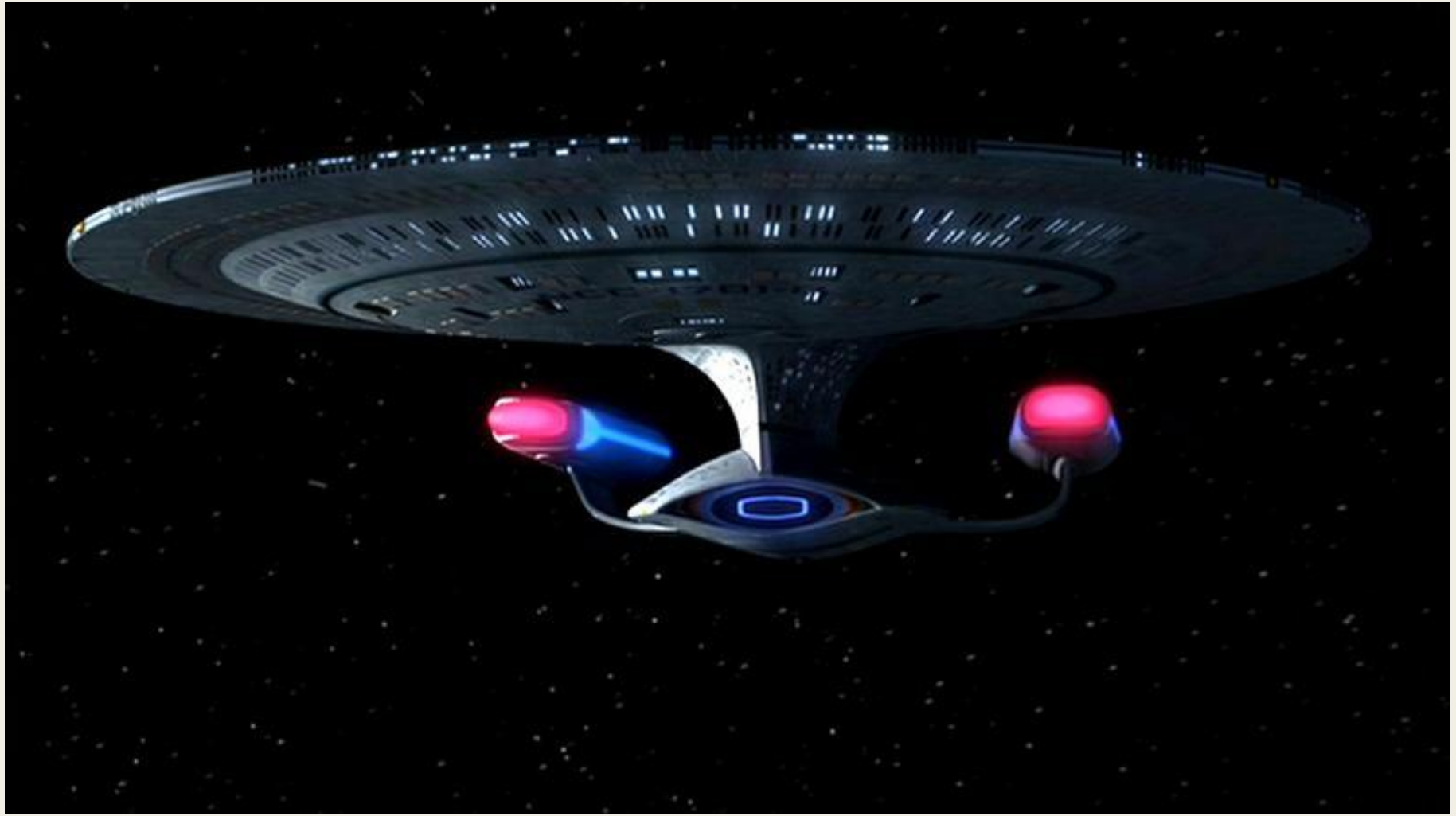
Copyright Charles Schultz

# There are lots of moving parts



Babbage Difference Engine - Image: [Marcin Wichary](#)

# What You Want



Copyright Paramount Pictures



# What You're Getting



Image: [gilhooly\\_studio](https://www.gilhoolystudio.com/)

# People: Who's Got Your Back?



Copyright 20<sup>th</sup> Century Fox



# Principles Over Personalities



Copyright Marvel

# Don't Go It Alone!



Copyright 20<sup>th</sup> Century Fox



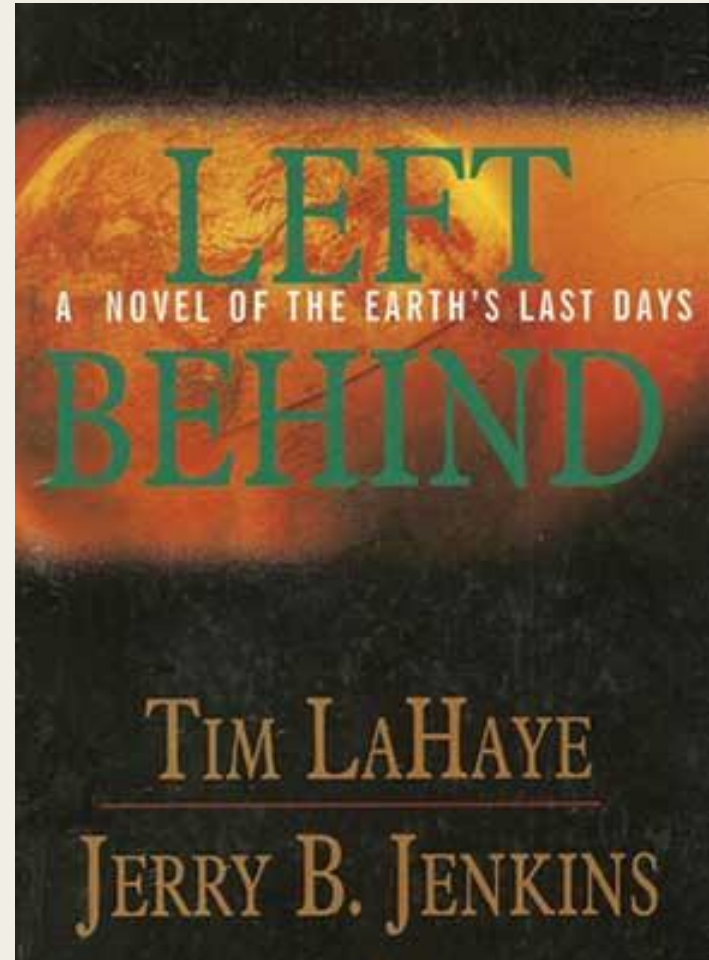
# Not Everyone's Alike



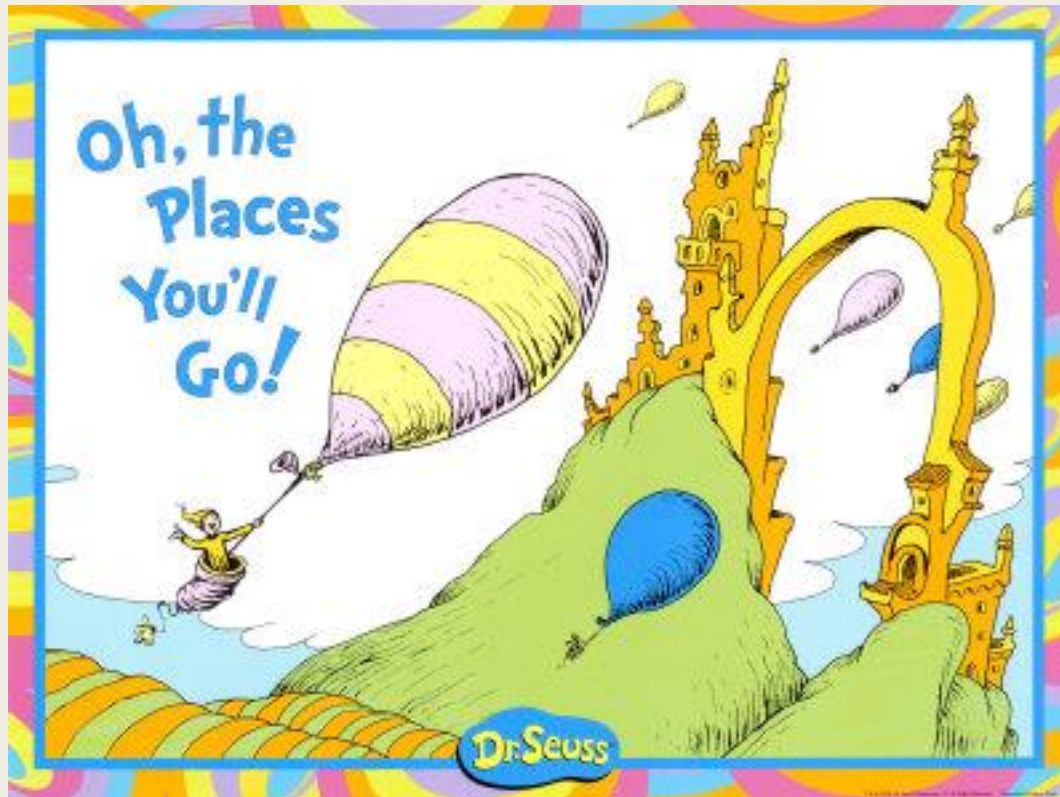
Copyright Paramount Pictures

# Otherwise...

- No buy-in from key management partners
- Process abandoned by stakeholders
- Poor user adoption
- Lots of time wasted
- Loss of funding for new database/CRM
- Partial implementation
- People and processes left behind



# The Process: How to Choose?





# A Few Definitions...

CRMs and Databases – What are they? Why is this important?



Images from [teknoskills.com](http://teknoskills.com) and [iconhot.com](http://iconhot.com)



# How to Choose?

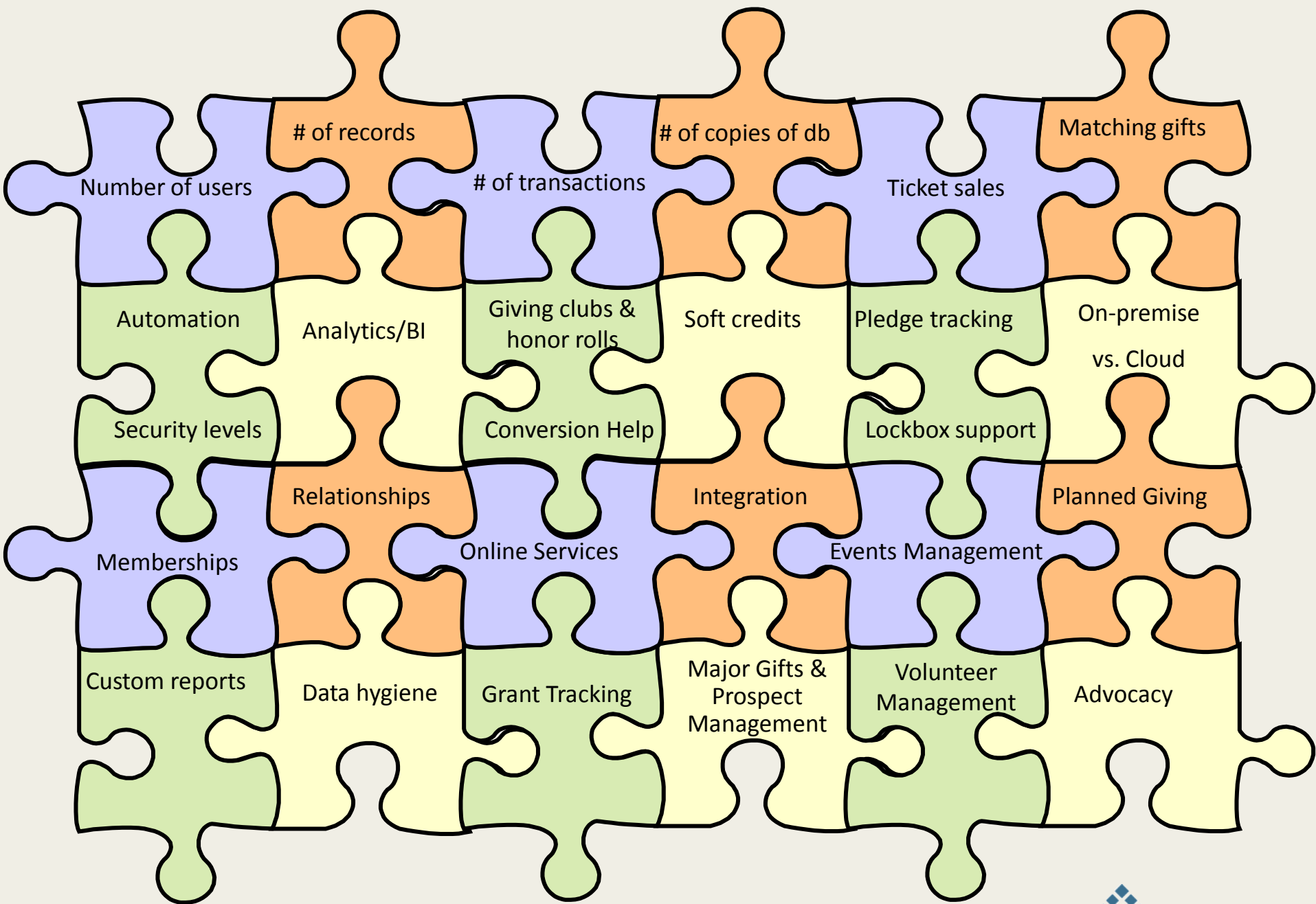


Image: [emilio labrador](#)

# Document Your Requirements



Copyright Warner Brothers





# You Need to Compare Apples to Apples



Image: [Castaway in Scotland](#)

**Vs.**



Image: [Brooks Elliott](#)

# Software Demonstrations

## Sample of a Demo Script:

Add a record for Barney Rubble, with a \$25 gift.



Copyright Hannah-Barbera

Add a record for Elizabeth McBricker, with a \$10,000 multi-year pledge through her family foundation. Give Elizabeth soft credit.



Copyright Hannah-Barbera



Marry the two records, change Elizabeth's last name to Rubble, add a salutation for "Betty", and show joint giving.



Image: Wedding Collectibles

They divorce. Show the database process. Are both of them still major donors?



Image: [DrJohnBullas](#)

# Try to Plan Ahead At Least 3 – 5 Years



Image: [xcunhax.fotografia](http://xcunhax.fotografia)

# Future-Proof, But Avoid the Lure of Shiny Objects



Image: [kurairo](#)

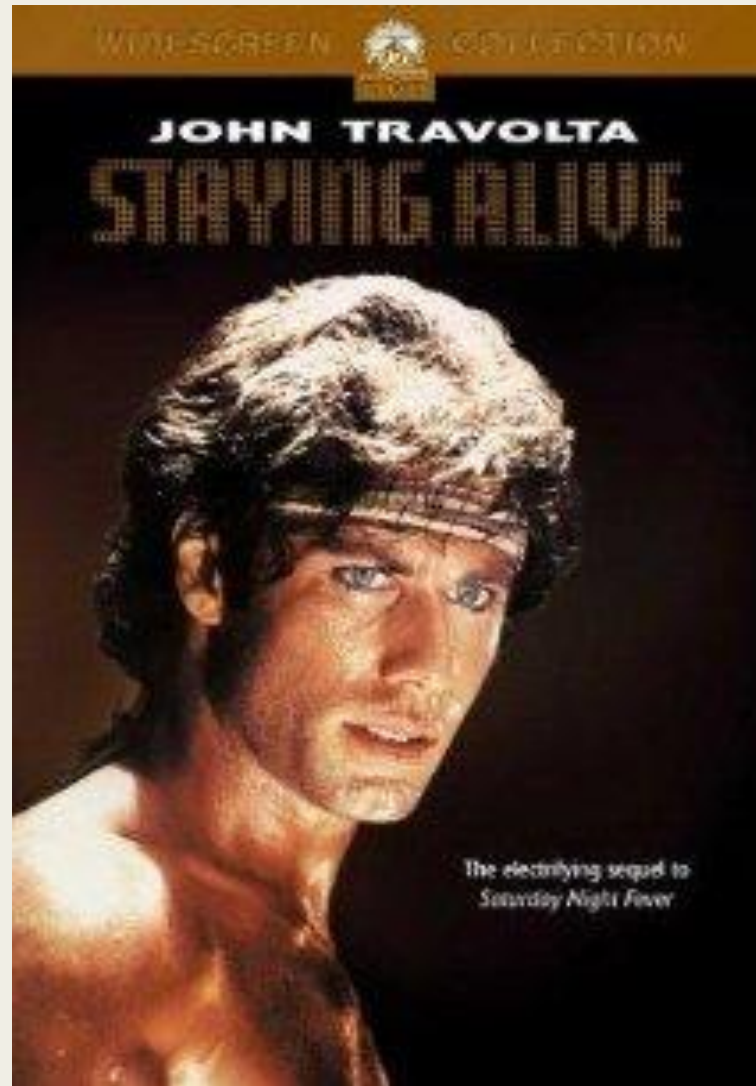
# Otherwise...

- Unable to understand key needs
- Lured in by unnecessary features while missing necessary ones
- Poor prioritization leads to poor selection
- A “best salesperson” selection instead of a best database/CRM selection
- Selection process derailed
- Need to do it again in a year or two





# Surviving the Conversion





# How Much Help Will You Need?

From the vendor, consultants, staff

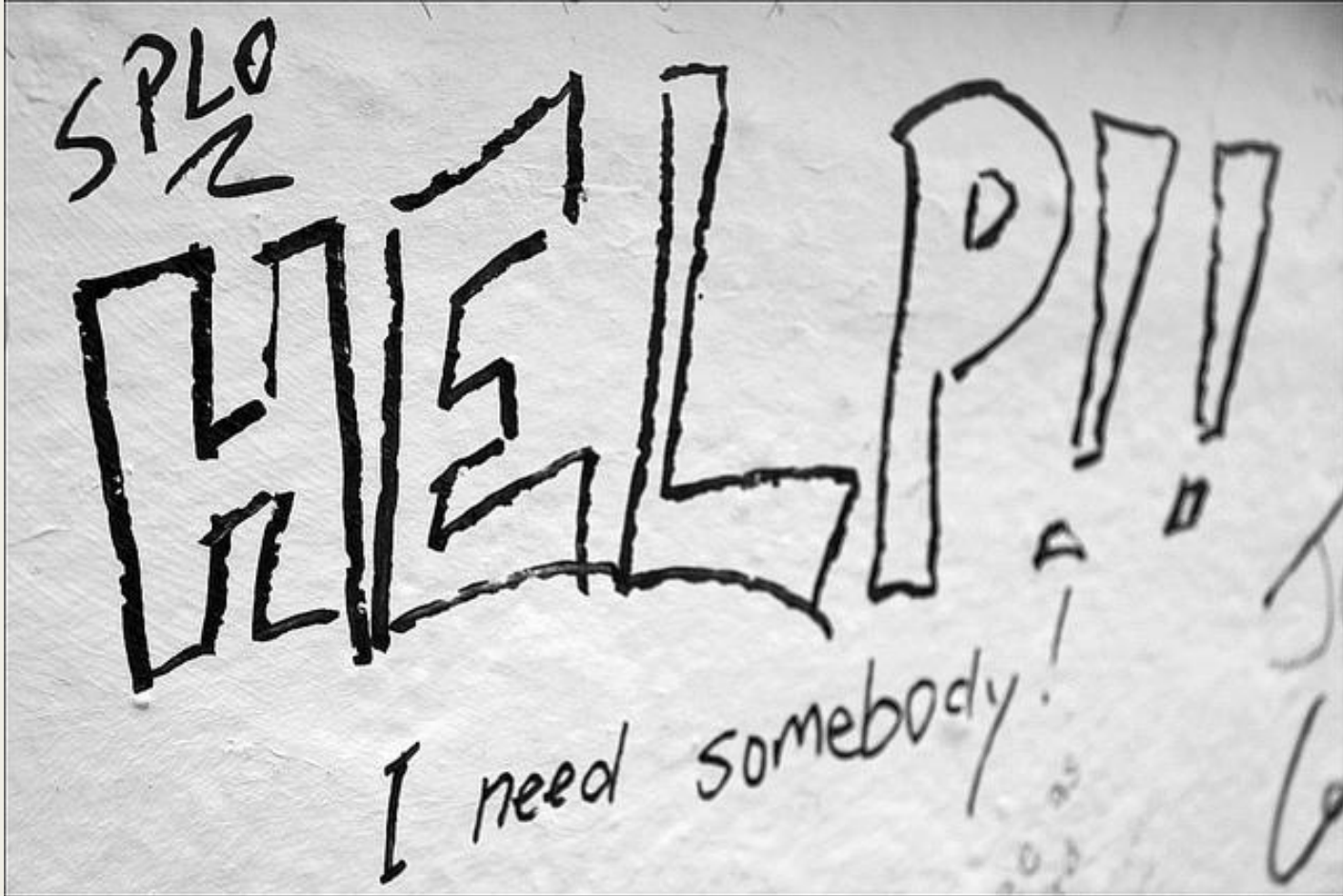


Image: [loop\\_oh](#)

# What Does Success Look Like?



Image: [Jeff Hester](#)

# Take baby steps



Image by [johnwilliamsphd](#)



# Plan for Data Migration and Outputs



Copyright Warner Brothers



# Timelines Need to Be Realistic



# Pick Two



Image: [inju](#)

Project = (Time + Money + People)

Less



Requires

More



&/or More



Images by [ToniVC](#), [Images\\_of\\_Money](#), [minifig](#)

# Anticipate “Unknown Unknowns”



Image: [nellyfus](#)



# Otherwise...

- Cost overruns because timelines are too short
- Not enough people to support transition
- Project runs out of money and is never finished
- Moving target of success means the project is never seen as complete
- Project collapses from scope creep

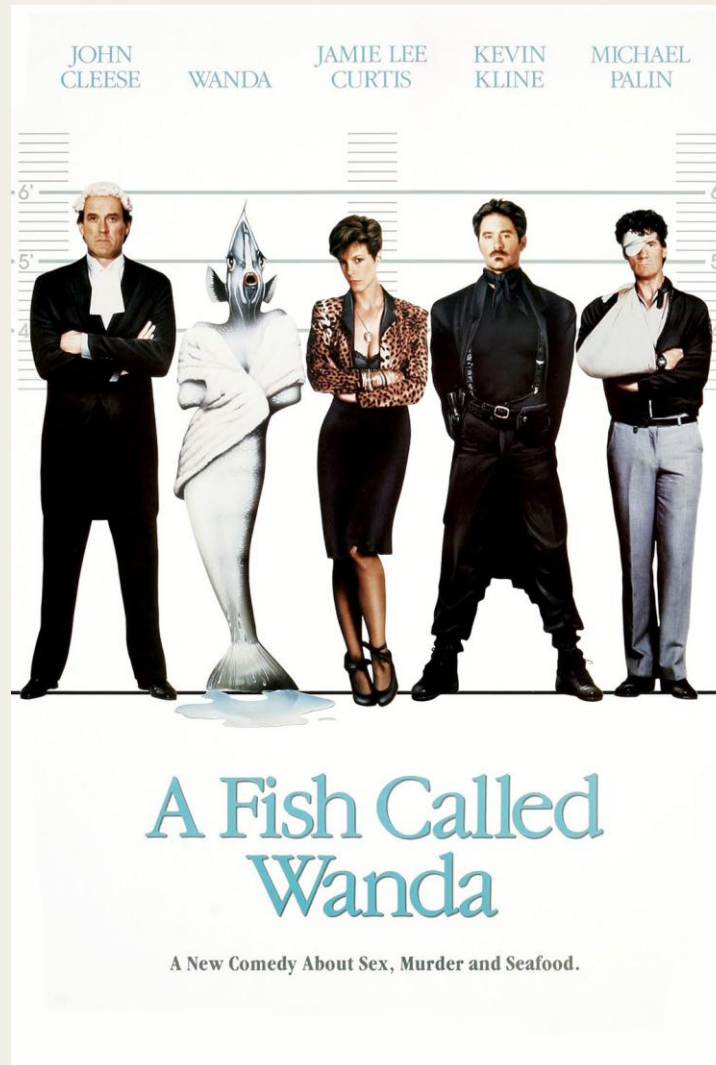


# Planning for the (Post-Conversion) Future



Copyright Universal Pictures/Amblin Entertainment

# Learn to Fish



Copyright MGM

# Best Practice, Best Use



Images from Star Trek Wiki, and iStockPhoto.com



# Pulling It All Together

- There is no perfect database. Need to understand the tradeoffs.
- Discovery, prioritization and buy-in are key
- Compare “apples to apples”
- Realistic timeline, staffing, and budget
- Plan for adoption time
- Plan for the future



Copyright Newline Cinema/Wingnut

# Other Considerations

“What’s this 360 View I keep hearing about?”



Copyright Newline Cinema

# Resources

FUNDsvcs listserve: [fundsvcs.org](http://fundsvcs.org)

Idealware: [www.idealware.org](http://www.idealware.org)

Information Systems Forum:

[tech.groups.yahoo.com/group/Information\\_Systems\\_Forum/](http://tech.groups.yahoo.com/group/Information_Systems_Forum/)

NTEN lists & Communities of Practice:

<http://www.nten.org/networking>

Progressive Exchange: [www.progressiveexchange.org](http://www.progressiveexchange.org)

TechSoup's Databases and Software forum:

<http://forums.techsoup.org/cs/community/f/20.aspx>

Database user groups

Database conferences with nonprofit tracks

# Resources

Melissa Barber: [\*An Accidental Techie #FAIL Story \(CRM project gone wrong\)\*](#)

Laura Bibbo: [\*7 Things to Think About Before You Implement a Fundraising System\*](#)

Cloud4Good: [\*Choosing the Right CRM Administrator\*](#)

Keith Heller: [\*Do You Need New Donor Management Software?\*](#)

Keith Heller: [\*What is CRM and what does it mean to nonprofits?\*](#)

Idealware: [\*10 Things To Consider in a CRM\*](#)

Tracy Kronzak: [\*So You've Hired a CRM Administrator...\*](#)

Tracy Kronzak: [\*Salesforce Administrators and Puppies\*](#)



# Resources

Bethany Lang: [\*Moving in to your new nonprofit CRM\*](#)

Michelle Murrain: [\*The True Costs of Free and Low-Cost Software\*](#)

NTEN Workbook: [\*Getting Started with Data-Driven Decision Making\*](#)

Mary Pustejovsky: [\*Top Qualities in a Great CRM Administrator\*](#)

Laura Quinn: [\*There Ain't No Such Thing As a Free Software Package\*](#)

Laura Quinn: [\*Is A Single Database Right for Your Org?\*](#)

Holly Ross: [\*Selecting a Nonprofit CRM System? Start with the Strategy!\*](#)

# Resources

Salesforce: [\*Achieving outstanding CRM administration\*](#)

Robert Weiner: [\*Finding the Perfect Fundraising Database in an Imperfect World\*](#)

Robert Weiner: [\*Back Away From That Spreadsheet: Why Excel Isn't a Donor Database\*](#)

Robert Weiner: [\*Ten Common Mistakes in Selecting Donor Databases \(And How to Avoid Them\)\*](#)

More resources are posted at  
[www.rlweiner.com/resources.html](http://www.rlweiner.com/resources.html)  
and [www.cloud4good.com/blog/](http://www.cloud4good.com/blog/)

# Q&A



Copyright  
Warner Brothers

# More Questions?

**Tracy Kronzak**  
**Cloud for Good**

[Tracy@cloud4good.com](mailto:Tracy@cloud4good.com)

**@TracyKayeOAK**

510.575.9591

**Robert Weiner**

**Robert L. Weiner Consulting**

[robert@rlweiner.com](mailto:robert@rlweiner.com)

**@Robert\_Weiner**

415.643.8955