

Ready, Fire, Aim

#12ntcfire



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?!



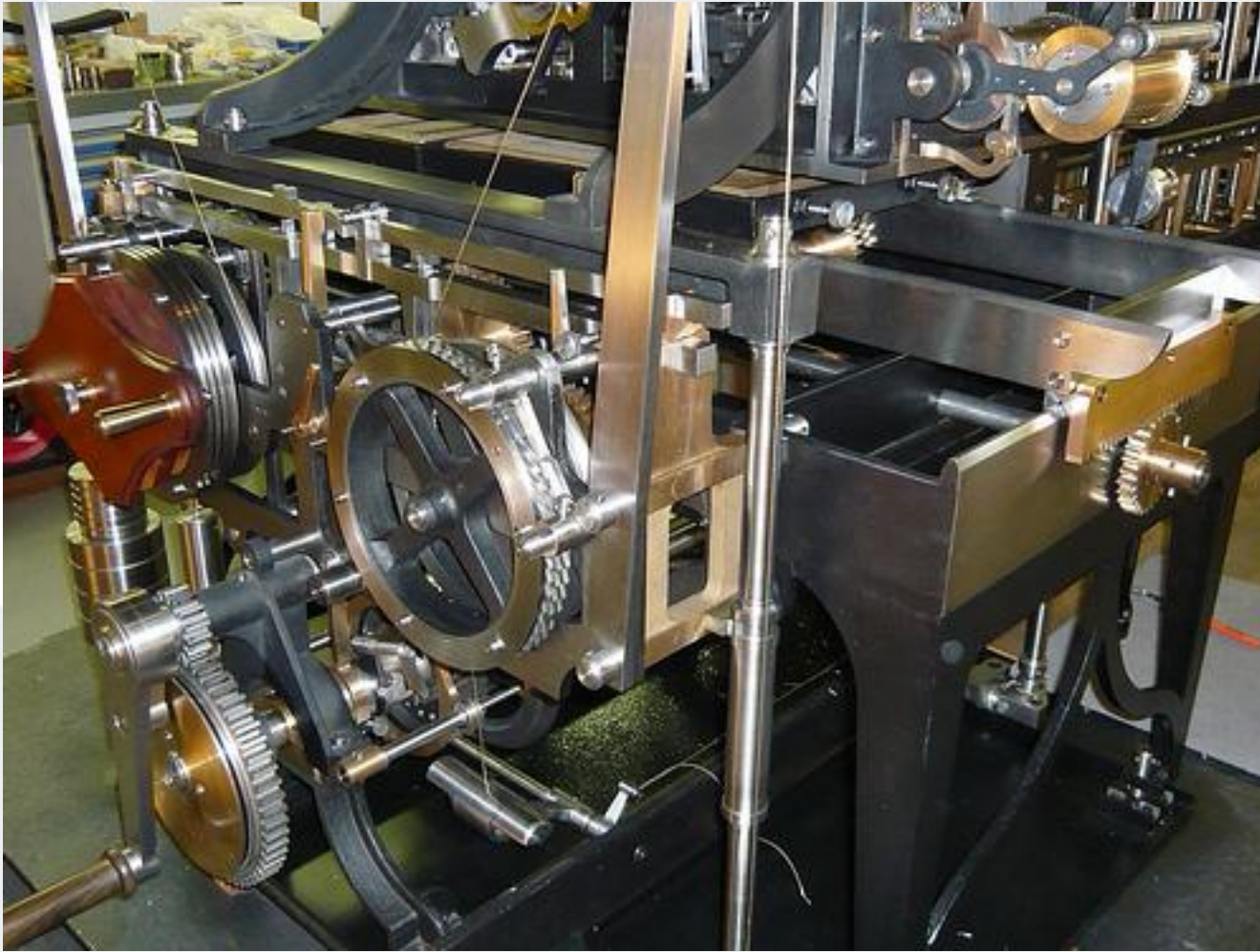
Image: [Marc Brakels](#)

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: <http://awwwpuppyawww.com>

People: Who's Got Your Back?



Copyright 20th Century Fox

Don't Go It Alone!



Copyright 20th Century Fox

Unexpected Allies



Copyright 20th Century Fox

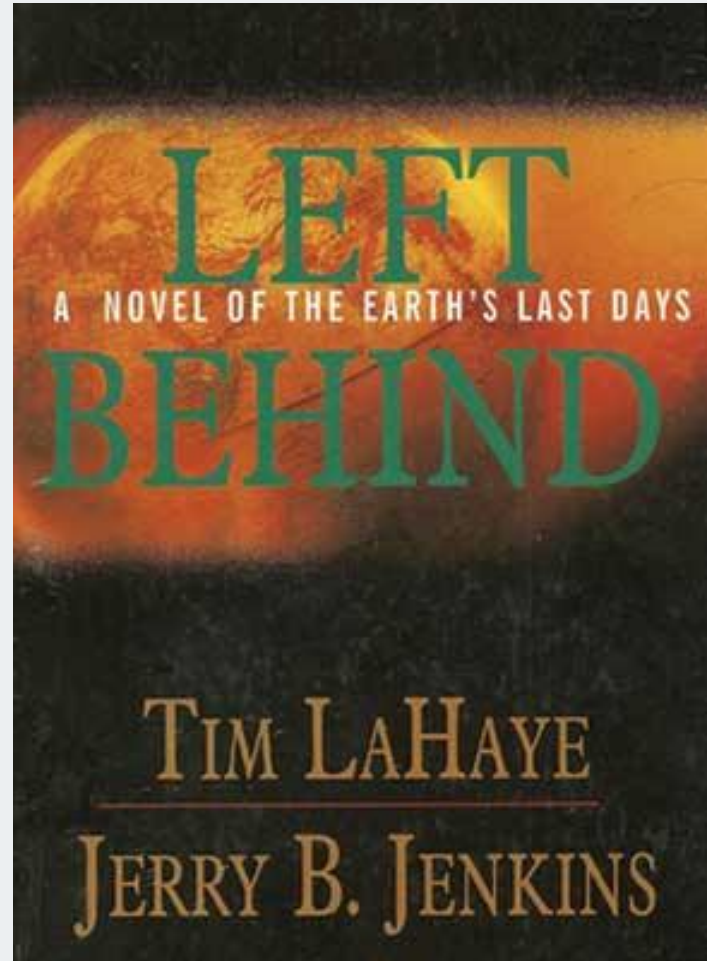
Not Everyone's Alike



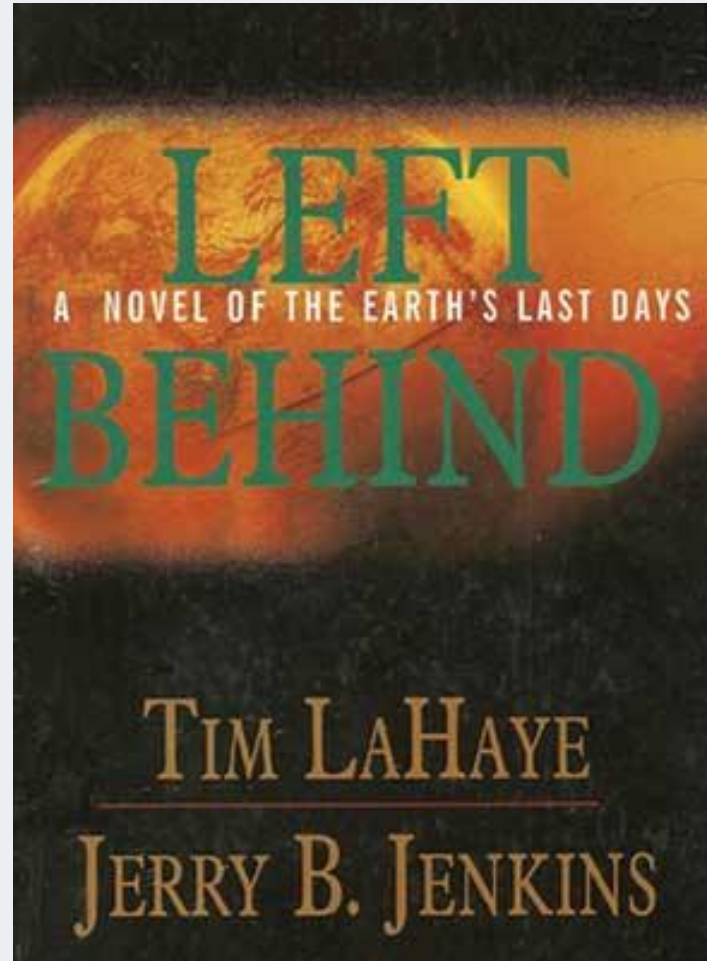
Copyright Paramount Pictures

Otherwise...

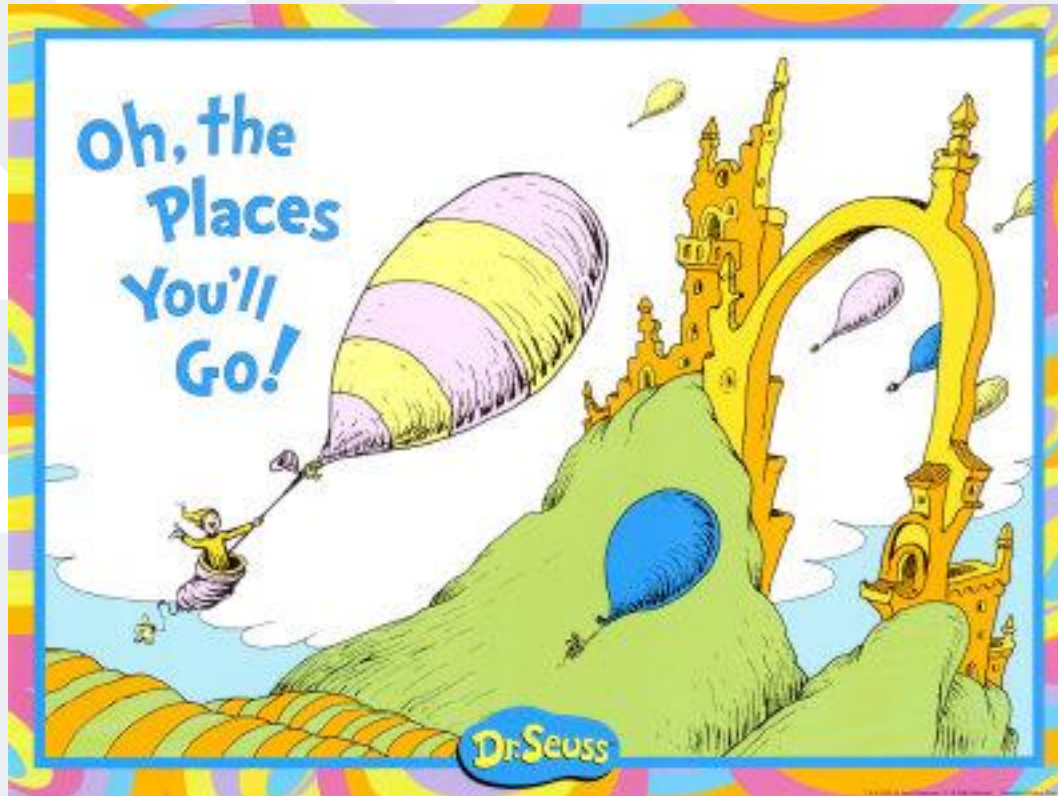
- No buy-in from key management partners
- Process abandoned by stakeholders
- Poor user adoption
- Lots of time wasted
- Loss of funding for new database/CRM
- Partial implementation
- People and processes left behind



Have you been Left Behind?



The Process: How to Choose?



How to Choose?

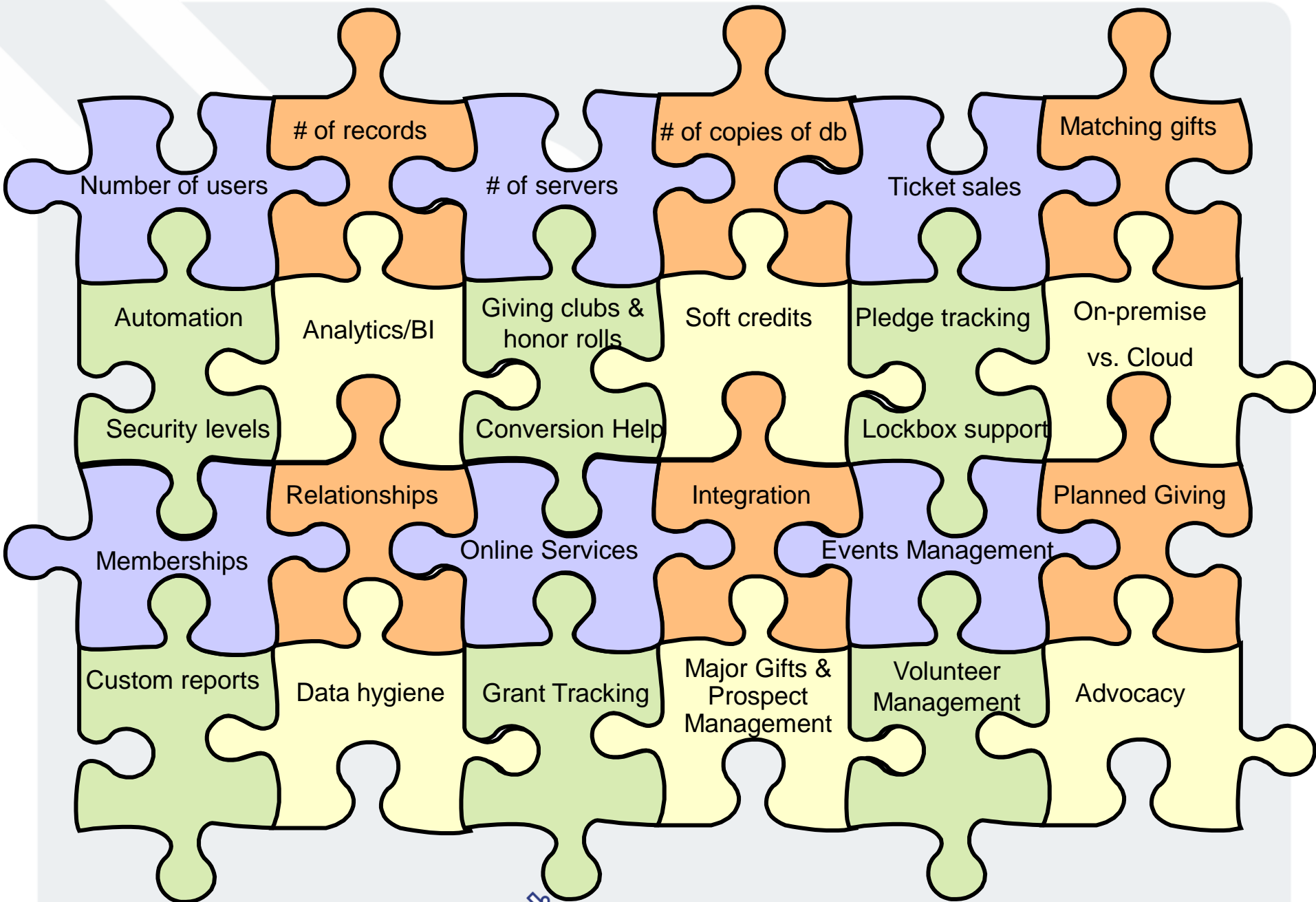


Image: [emilio labrador](#)

Document Your Requirements



Copyright Warner Brothers



You Need to Compare Apples to Apples



Image: [Castaway in Scotland](#)

Vs.



Image: [Brooks Elliott](#)

Try to Plan Ahead At Least 3 – 5 Years



Image: xcunhax.fotografia

Future-Proof, But Avoid the Lure of Shiny Objects



Image: [kurairo](#)

Otherwise...

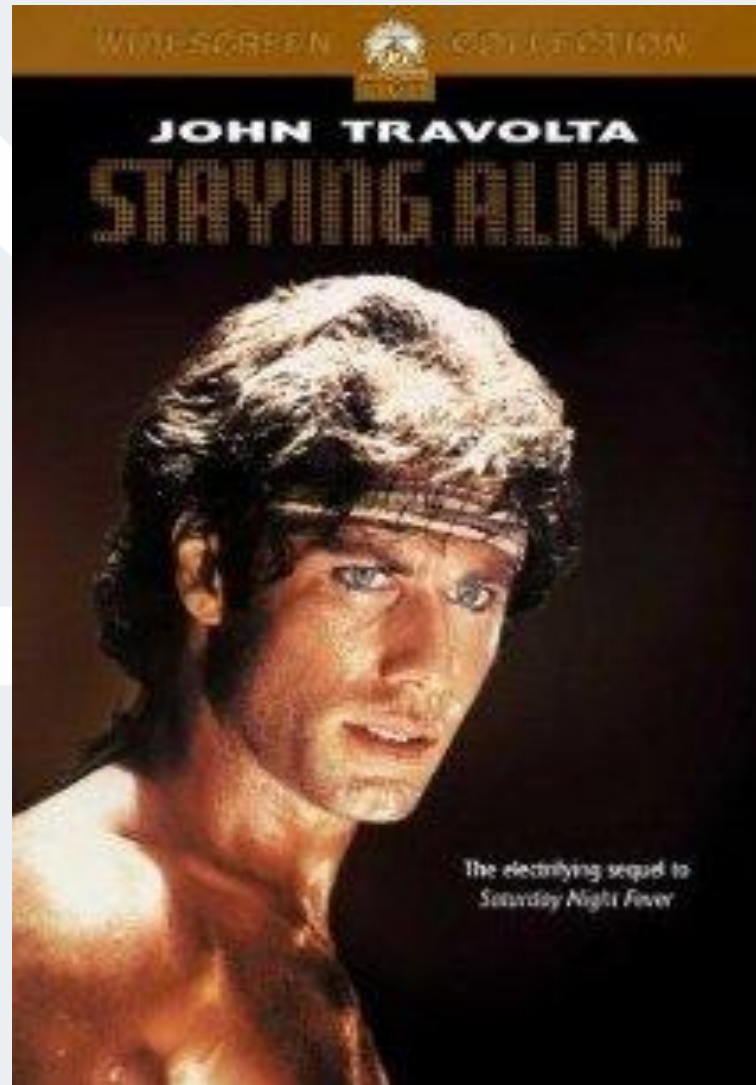
- Unable to understand key needs
- Lured in by unnecessary features while missing necessary ones
- Poor prioritization leads to poor selection
- A “best salesperson” selection instead of a best database/CRM selection
- Selection process derailed
- Need to do it again in a year or two



All Aboard the Crazy Train...



Surviving the Conversion



What Does Success Look Like?



Image: [Jeff Hester](#)

Kronzak/Weiner: Ready, Fire, Aim

How Much Help Will You Need?

From the vendor, consultants, staff

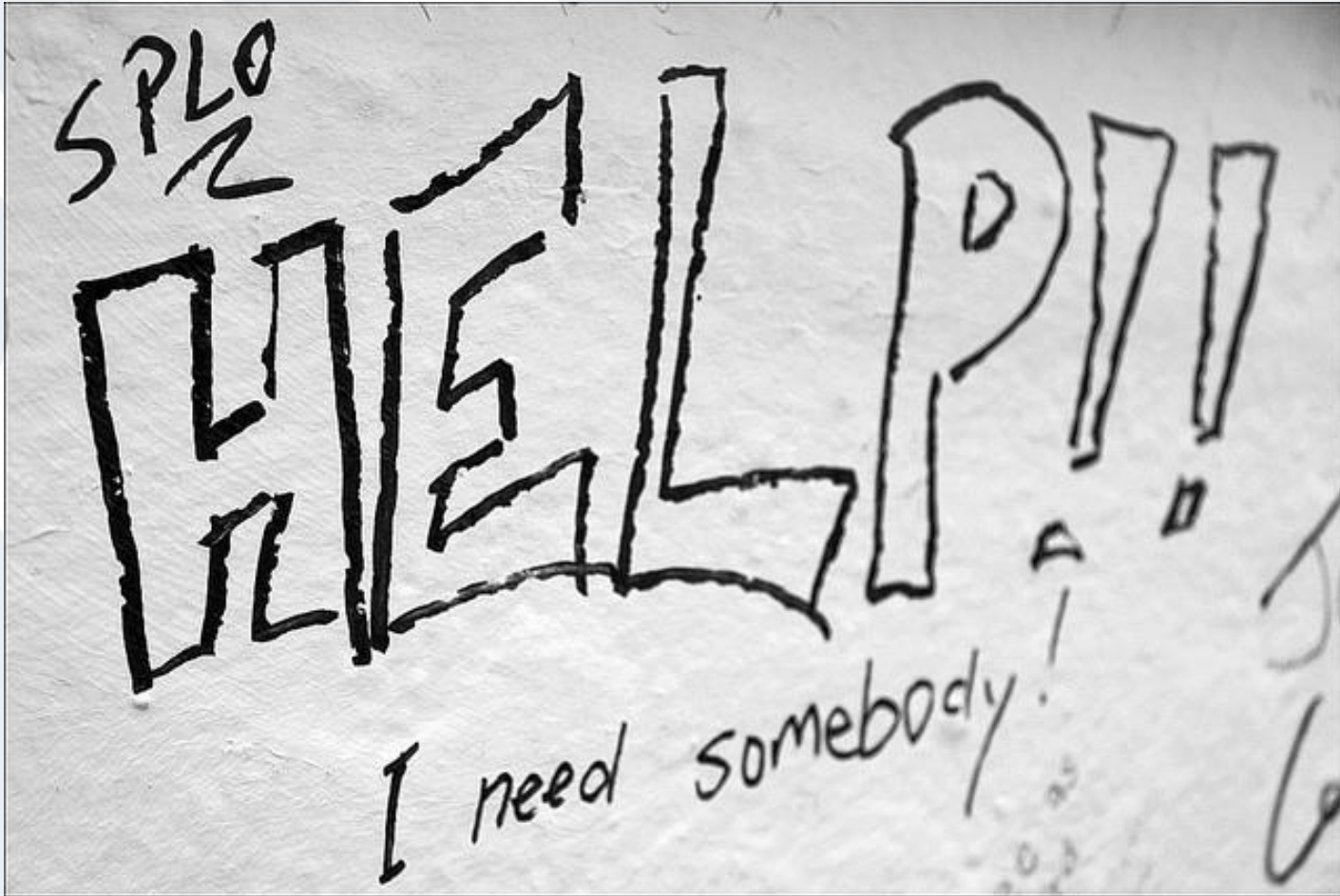


Image: [loop_oh](#)

Plan for Data Migration and Outputs



Copyright Warner Brothers

Timelines Need to Be Realistic



YOU WANT IT WHEN?!

Pick Two



Image: [inju](#)

Project = (Time + Money + People)

Less



Requires

More



&/or More



Images by [ToniVC](#), [Images_of_Money](#), [minifig](#)

Anticipate “Unknown Unknowns”

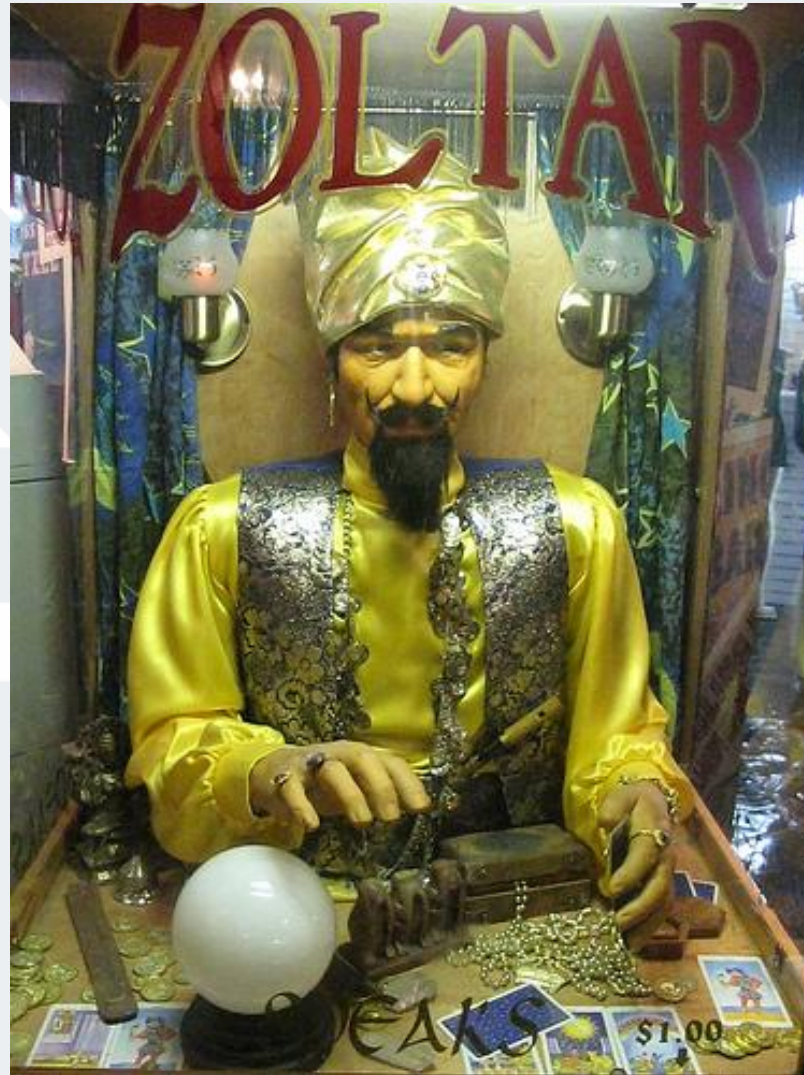


Image: [nellyfus](#)

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



Other “Unknown Unknowns”?



Planning for the (Post-Conversion) Future



Copyright Universal Pictures/Amblin Entertainment

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

Other Considerations

“The Cloud”



Resources

- Association of Advancement Services Professionals (AASP): advserv.org
- FUNDSVCS listserve: fundsvcs.org
- Idealware: www.idealware.org
- Information Systems Forum:
tech.groups.yahoo.com/group/Information_Systems_Forum/
- NTEN lists & Communities of Practice
- Progressive Exchange: www.progressiveexchange.org
- TechSoup's Technology for Fundraising forum:
forums.techsoup.org/cs/community/f/18.aspx
- Database user groups
- Database conferences with nonprofit tracks

Resources

Heller, Keith: *Do You Need New Donor Management Software?*

www.idealware.org/articles/new_dm_software.php

Murrain, Michelle: *The True Costs of Free and Low-Cost Software*

www.idealware.org/articles/true-costs-free-and-low-cost-software

Weiner, Robert : *Finding the Perfect Fundraising Database in an Imperfect World*

www.rlweiner.com/grf/grf_finding_perfect_database.pdf

Weiner, Robert: *Ten Common Mistakes in Selecting Donor Databases*

idealware.org/articles/ten_common_mistakes_in_selecting_donor_databases.php

Wild Apricot: *Membership Database Selection* (part 1 of 3)

www.wildapricot.com/blogs/newsblog/archive/2011/03/16/membership-database-selection-part-1-2D00-Defining-Your-Needs.aspx

More resources are posted at www.rlweiner.com/resources.html and

www.teamheller.com/resources

Q&A



Copyright Warner Brothers

Evaluate This Session!

Each entry is a chance to win an NTEN engraved iPad!



or Online using 12ntcfire at www.nten.org/ntc/eval

