



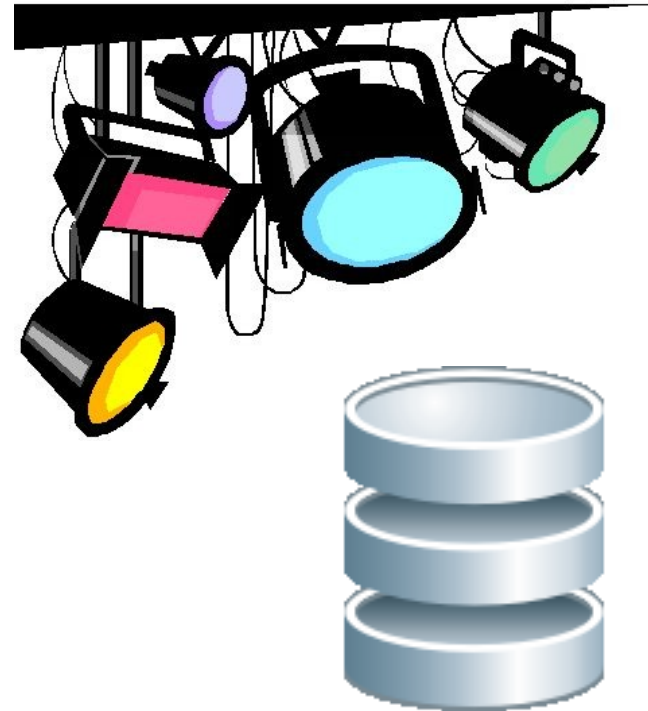
MemberWise



Promoting value and good business practice

The Perfect Database:

Does it really exist?





Background - Richard Gott

- British Energy Plc
- British Dental Association (BDA)
- College of Optometrists (COO)
- Qualifications & Curriculum Development Agency (QCDA)
- National Assessment Agency (NAA)
- Chartered Institute of Educational Assessors (CIEA)
- Ex-Professional Associations Research Network (PARN) Steering Group Member
- UK Inter-Professional Group CPD Forum Member
- CPD Institute Affiliate Member
- Founder of MemberWise
- Not a salesman, consultant, trainer – Just want to see things improve!



PROMOTING BEST PRACTICE
IN CHARITY FINANCE

Background – Michael Dykes

- Head of Membership & Information at Charity Finance Directors' Group (CFDG)
 - Membership scheme, services and benefits
 - CRM database, website/CMS, e-communications tools
- Software company for seven years supplying not-for-profit sector with CRM systems
 - Customer-facing, not a techie!
 - Implementations and project management
 - Very wide customer base
- Finance management and company secretary role in a service-providing housing rights charity



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Promoting value and good business practice

Seminar Objectives

- A Quick Overview - MemberWise
- A potted history of CRM...
- Results from a Membership Think-Tank :You and your CRM...
- What you might want...
- Is full integration the way forward?
- In the box (new developments) & out of the box (future developments)
- Procuring a new CRM system + MemberWise Top Tips
- Questions & Answers



MemberWise



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What is MemberWise?

A FREE network of professional membership organisations and association representatives.

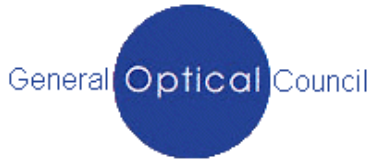
Dedicated to:

- Spreading good practice –Through advice, seminars and networking
- Improving value – By negotiating discounts & preferential service from suppliers
- Free resource – website, professional networking groups, e-update

Check out the leaflet on your chair or in your delegate pack!

So who do we represent?

1,000 Subscribers!





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How many suppliers are on-board? 90!



SKIPTON FINANCIAL SERVICES



Discounts range from 10% to 50% so please do take a look at the site when you are thinking about making a purchase – We can save you time and money!

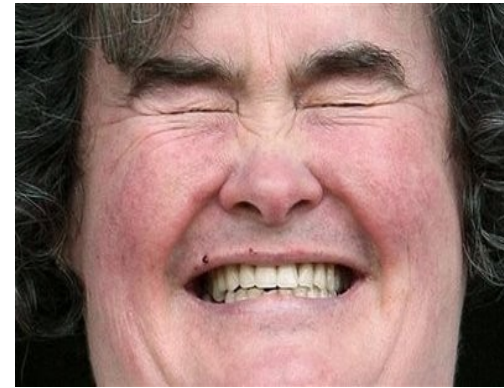


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How many times have you felt like this when you have realised that your database cannot deliver?...





PROMOTING BEST PRACTICE
IN CHARITY FINANCE

Case Study: Charity Finance Directors' Group

CFDG:

- 1,800 members

- Established 1987

- Represents whole gamut of the not-for-profit sector

- Policy & campaigning, events/networking, best practice pubs/surveys/reports

Key areas of activity requiring a CRM system:

- Membership scheme (including all of its peculiarities!)

- Event management

- Contact management

- Website integration

- E-communications

CRM - A potted history...

- 30 years ago: Paper records, big old filing cabinets, status-driven benefits and physical products/services and events.
- 20 years ago: Basic DOS/Unix databases, hardcopy records stored. A move to service-led and support orientated products and services. International market opening up.
- 10 years ago: More powerful back office databases for Windows and separate basic websites. More emphasis on support and input-driven CPD. International offerings increase. Millennium issues push organisations to upgrade/replace.
- 8 years ago: More back offices + websites start talking to each other. Online joining, members able to update their records, pay for products and services online. Some membership orgs go 'international'
- 5 years ago: More advanced integration, virtual services, outsourcing, competency-based CPD opportunities. Many membership orgs now 'global'.
- Over the past year or so: A move towards mobile apps & mobile web enabled functionality. Cloud hosting



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IN CHARITY FINANCE

Case Study: Charity Finance Directors' Group

Overview of the organisation's CRM history

- First CRM system implemented from 2002 to 2004...
- Relatively advanced regarding website integration
- Need for change:
 - Glorified address book!
 - Gear shift for website integration
 - Supplier failure to deliver 2005 to 2007
 - Ongoing customer/supplier relationship
- New CRM system implemented and gone live by October 2008



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And our survey said....

- A Membership Think-Tank Session in July 2009
- 50 membership organisations & associations
- >80 Membership/Marketing Coordinators/Managers/Directors & CEOs
- A 'safe' environment to openly discuss – No suppliers were permitted





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So what is your relationship like with your CRM?



Very Happy



Whatever



Very Unhappy



Happy



Unhappy



Thinking about
changing



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And our survey said....

- 75% happy/25% unhappy
- Most important factor when considering CRM purchase – Functionality
- Reputation is a given throughout the tender process
- Important to hear what other membership organisations had to say
- Top wants – Online joining and functionality for members to update details



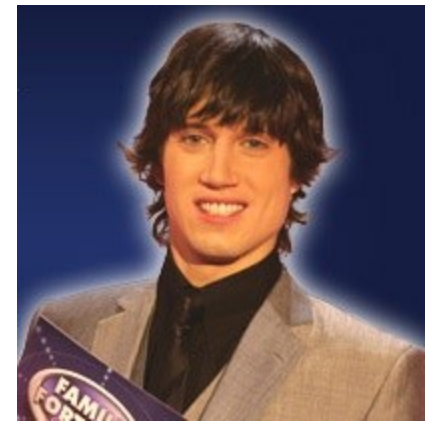
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Relationship with CRM system provider...

- What is your relationship with your CRM system? Mostly good but want more functionality!
- What is your relationship like with your provider? OK
- How do you use your CRM? Differed between smaller and larger organisations
- How many members of staff use it? Depended on size
- Can you depend on it? Mostly yes, but some sniggers!





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IN CHARITY FINANCE

Case Study: Charity Finance Directors' Group

Relationship with CRM Provider

A key element in the successful implementation of a CRM system and critical to the ongoing maximisation of ROI

- Communication
 - Formal and regular
 - Informal – open and honest
 - Early warning
 - Responsive (ideally pro-active)
- Resources – targeted and technical
- Support
 - Accessible and responsive
 - Does not cost the earth!
- Forward-looking
 - Growth of your business
 - Clear development path/schedule



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IN CHARITY FINANCE

Case Study: Charity Finance Directors' Group

Relationship with CRM Provider continued

Indicators of a “good” supplier might include:

:

- A harmonious balance of power between its sales people and its technicians – sales pitch versus technical capacity and attitude to charging for development
- A cultural fit with your organisation – ethos, size, aspirations, personnel



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What is important to you?

- Functionality - MOST IMPORTANT
- Value for money – VERY IMPORTANT
- Ease of use – IMPORTANT
- Integration with other systems – IMPORTANT
- After-care service/support – IMPORTANT
- Reputation of provider - ONLY SEE REPUTABLE PROVIDERS





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IN CHARITY FINANCE

Case Study: Charity Finance Directors' Group

What CFDG wants and why it selected its CRM system

- Supplier “fit” and potential for a positive ongoing relationship
- Due diligence
 - Financial position
 - Existing customer base (CFDG member charities)
- Cost
- Ability to integrate with the website
- Membership functionality
- General functionality – usable “out of the box”



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What you and your organisation might want...

- Online joining, renewals & recommend a colleague
- Online credit/debit card payments (joining & shop)
- Online (paperless) direct debit set-up functionality (back-office and web)
- Ability for members to update their own membership record
- Online exams with results integration
- Input & output/outcome-based online CPD schemes + hosting
- Integrated online surveys/questionnaires
- Online forums with intuitive product/service recommendations
- Less hardcopy membership applications
- Some kind of social networking integration
- Mobile applications



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Full Integration – This way forward?





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Back Office Database



**CPD, Events, Exams,
Financial Packages,
Fundraising, Marketing,
Online Surveys, Online
Newsletters, Shop,
Training, Website**





Full Integration – The way forward?

- a) Should we strive for total integration? NO
- b) Should we strive for integration of key areas? YES
- c) What is the main risk relating to 'full' integration? COMPLETE RELIANCE
- d) What is the most important functionality to integrate? ONLINE JOINING
- e) What would you never integrate? CONFIDENTIAL INFORMATION





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IN CHARITY FINANCE

Case Study: Charity Finance Directors' Group

Is full integration desirable for this organisation?

No! The website is integrated to a high degree but:

- Technically challenging
- Tensions between the CMS and the CRM – which drives what?

Would like to integrate e-communications but...

Do not wish to integrate the accounting software package



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Desirable future functionality for your organisation...

IN THE BOX...New or improved functionality



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- Less 'clunky' online joining/renewals and related integration
- Repeated periodic credit card payments via third party plug-ins
- 'Paperless' Direct Debit functionality – Great for renewals!
- Fully integrated events booking with automatic delegate management and e-ticketing functionality
- Web content generation linked to interest area or geographic location



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Desired future functionality for your organisation...

OUT OF THE BOX...Just out...



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Web-enabled mobile technology:

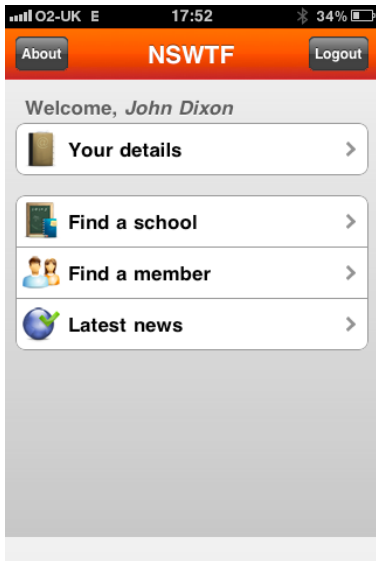
- Chartered Institute of Securities & Investments (CISI) CPD Application
- New South Wales Teaching Federation (AUS) – Web enabled content enables representatives to check membership status on-the-road



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Letter	Name	ID
C	Black, Leonie	8661609
C	Cogger, John	8450027
C	Cox, Michelle	48745
C	Culligan, Margaret	8861560
D	De Muth, Jillian	3020029
D	Dean, Gayle	1035226
D	Dewar, Claire	3039291
H	Hammond, Marya...	7062620
H	Hodgson, Louise	3037962



- New South Wales Teaching Federation
- 67,000 members
- Web enabled content for Federation Representatives
- Enables quick identification of 'Financial' or 'Non-Financial'





We have had:

- In the BOX...
- Out of the BOX...

All good!

But, now for some MemberWise Advice:

‘Avoid sh*t Boxes...’



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Introducing the Sh*t Box... No really!



£14.99 from Firebox.com
(No MemberWise Discount!)

'FAD' functionality.... Great for a short time (e.g. at a festival), but you probably wouldn't want to keep it or take it home with you!

Don't waste your money!



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Examples of possible fads:

- Linking back office with online social networking content
- Full e-newsletter and online survey integration
- Having a module simply because it is there

'We have bought the CPD Module so lets bloody well use it!'
(CEO of a well-known professional institute)





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Replacing or Procuring a new CRM System....

Options...

In-house



Combination of in-house and third party. E.g. hosted externally

Just don't bother – Excel!



Outsource. E.g. Assoc Mgt Company



- Procure your new CRM/database with due diligence and care
- Remember – They will only know what you tell them!
- Ethical suppliers will carry out a detailed assessment of your requirements. If they cannot meet these they will not sell their product to you.
- Less ethical suppliers will sell to you regardless – So be warned!

Let me throw you a rope...



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- Fail to plan - Plan to fail!
- Take an inclusive approach – Involve colleagues
- Document everything & ensure contracts/SLAs are in place are legally binding!





Preparation

- Assign a project manager or employ a professional database consultant
- Assess your needs carefully - Get colleagues involved and document
- Map your processes out clearly and place them at the forefront!
- Compile a detailed requirements brief in co-operation with your colleagues and finally in collaboration with your chosen supplier
- Consider adopting a robust and accountable project management approach. E.g. PRINCE2





Your requirement brief may include:

- Basic contact details – Name, address, tel, email, post-nominals
- Membership type – Grade, voting-status
- Financial & membership reporting requirements – Membership reports
- Event Management – Back office & online registration
- Member profile - Qualifications, experience, region
- CPD logging – input, output or outcome based?
- General Admin/Audit log. E.g. Sent magazine 02/03/2011
- Website integration – Member login, password change, online joining/renewal
- Payment administration – Credit card, paperless DD
- Third party plug-ins – E.g. Bank, postcode, credit card, accounting package
- Ability for members to update their own details
- Online Shop – Product and service purchasing
- Equal opportunities, specific T&Cs, feedback tracking

Tip: Compile a pro-forma response sheet - Request a formal response to each requirement with the options 'Standard, Not available, or Custom'. Ask that any 'Custom' be fully costed.



PROMOTING BEST PRACTICE
IN CHARITY FINANCE

Case Study: Charity Finance Directors' Group

How this organisation prepared to select a supplier

- Informal software demonstrations from the “major players” three months ahead
- Internal requirements gathering involving all teams
- Small project team of four
- Formal tender process – an ITT but no detailed (i.e. field-by-field) functional specification at this stage
- Thorough short-listing process and two rounds of demonstrations with all teams in the audience for the second round
- Negotiated contracts in parallel with two suppliers
 - References (especially from CFDG member charities)
 - Practical demonstration of functioning website integration

Fortunate to have in-house experience but did undertake regular “sanity checks” with an external consultant.



Procurement

- Go out to formal tender
- Use your requirement brief
- Provide an overview of your organisation
- Set a sensible time-frame

So how do I find reputable CRM providers?

Note: They are not hiding!





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Supplier Search

Circulate a clear and detailed requirement brief to all suppliers:

Where can I find suppliers?

- On the MemberWise site – www.MemberWise.org.uk
- Online search (e.g. Google, Bing, Yahoo! etc)
- Trade Exhibitions. E.g. NFP Technology Exhibition 2011
- Trade media
- Word of mouth (Join the MemberWise Professional Networking Group!)
- Consultants (Discounts from 10% on the MemberWise website)





PROMOTING BEST PRACTICE
IN CHARITY FINANCE

Case Study: Charity Finance Directors' Group

Having selected its CRM provider, how CFDG prepared for success in implementation

- ITT stage – attitude to “out of the box” and internal agreement on where you are prepared to compromise and change business processes.
- Internal politics – sort it out beforehand! CFDG relatively small and agile but strong leadership from the top really helps.
- Know your existing data and system – critical to successful data transfer and correct set-up of the new system.
- Dedicated resource – clear the decks.
- Internal project team – clear lines of authority and areas of responsibility. Have a good communicator leading the project day-to-day.
- Identify business-critical drivers and set realistic timescales accordingly.
- Have some slack in the budget!



Some key questions to ask:

- CAN YOU MEET MY SPECIFIC REQUIREMENTS?
- Will you be their largest/smallest client?
- Are they financially stable (check out the Companies House website)
- What are their technical capabilities?
- Check out online security measures!
- What are your impressions of their staff so far? In person & on the phone
- Do they appear to be open and transparent?
- Companies House – Accounts
- An understanding of their current & future business plan
- Does their approach appear flexible?
- What is their approach to getting you up and running?
- How will they support you? Make sure your SLA is tight and explicit!
- Have you been to their offices?
- Speak to their clients – Not the one(s) they wheel out – You choose a couple!
- Accessibility!



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They should ask you:

- Detailed questions about each and every requirement
- Challenge your requirements and suggest fit-for-purpose developments/ alternatives
- Can we take a good look at your current CRM?
- Have they mentioned a confidentiality agreement – Trust & honesty





Accessibility

- Sydney Olympics
- Website not fully accessible for the blind
- Fined \$20,000
- Americanisation of legal claims
- If it happens to one it could happen to all
- Question your supplier on their compliance
- See W3C recommendations – www.w3.org
- Ask for an online accessibility statement and also query level of compliance





Proposal from CRM/Database Provider – It should include...

- Key contact
- Overview of organisation
- Objectives of proposal
- A detailed overview of their offering
- Detailed info linked to your specific requirements outlining their solution
- Training requirements
- Reporting requirements
- Details of how your account would be managed and by whom
- Client responsibilities
- Implementation plan – with delivery dates and contingency built in
- Full list of fees
- Terms & conditions
- Appendices

Implementation...

Before implementation the following should have taken place:

- Final contract issued and agreed in principal
- Knowledge transfer taken place
- Process maps drawn up and refined + Critical steps (inc in contract!)
- Final contract and service level agreement updated and signed
- Regular meetings during the implementation – ‘Action sheets’ a must!
- Risk Register

How long should the whole process take? – Depends on resource, migration of data etc.

Moving forward...

- Ongoing support
- Regular account meetings (quarterly) – To include issues and actions
- Annual/biennial meetings to discuss refinements, upgrades or new functionality



Back to the research - Who should lead the way when it comes to development of CRM systems...

- Us?
- Suppliers?
- A bit of both?

Agreement...

Both and together!



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Overview of CRM-related product and service providers on MemberWise:

Website features the following organisations offering discounts of between 10% and 40% off RRP:



Smart Alternatives for Selecting Software for your Enterprise



An organisation makes an 8-10 year commitment when they choose an enterprise-wide software solution.

You need to weigh a variety of factors like functionality, technology, ability to execute, support, pricing, and more.



Join us for a free seminar to learn how you can make sure you have the technology and flexibility to see your organisation through the next decade.

**Free seminar every first & third
Wednesday every month in London**

U.S.A. Canada Europe Asia-Pacific

IRIS NFP World 2011



- 8th June, BMA House, London
- Theme: “Embracing the online experience”
- Speakers include The King’s Fund, Association of Corporate Treasurers, Association for Science Education, Royal College of Pathologists, IndigoBlue, NetXtra and Communicator Corp
- Launch of IRIS Integra Next Generation
- Register at www.iris.co.uk/nfpworld



How to use MemberWise

1. Visit www.MemberWise.org.uk
2. Visit the IT – CRM/Database page
3. Browse providers & associated info & advice (including client lists)
4. Once you have found a suitable provider, visit their website and click 'Obtain Discount'
5. MemberWise will then issue you with a unique discount code and get ready to save!

If you have any questions or queries please do not hesitate to email:

crm@MemberWise.org.uk



MemberWise

Thank you for your time!

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