



# The Secrets to Delivering a Successful CRM Project in NFP and Membership

Tried and tested tips for CRM success

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# Getting started

**Set your vision  
in terms of  
goals, not  
technology**

**Set realistic  
expectations  
early: think  
timeframes, costs  
and resource**

**Divide your  
project into  
manageable  
phases with  
clear objectives**

**Bring in  
external  
help if  
needed**

## **5 key roles to build your perfect CRM team**

- ▶ Project Sponsor
- ▶ Project Manager
- ▶ IT Manager
- ▶ Subject Matter Experts
- ▶ Solution Architect
- ▶ CRM Manager/Consultant

# Preparing a Business Case

**Gather a clear understanding of project costs and total cost of system ownership**

**Start with quick wins to achieve buy in for wider project**

**Tackle the question of ROI**

***“With Discovery behind us, we have collectively turned what felt like a mammoth and rather unwieldy project, into one that now has manageable phases and realistic timescales and estimates.”***

Dan Lockeretz, Head of CRM System, UnLtd



# Making sense of your data



# Preparing for Change

Set your vision from the very top

Create a mechanism for users to feed back ideas, suggestions and improvements

Take your users on a journey by communicating changes effectively

Think outside the box: use the opportunity to question the way you've always done things

***"Once new teams start to get their hands-on new technology, excitement can spread and other teams will start to ask for similar tools. It's crucial to celebrate this excitement while remaining firm in your project plan, communicating what they will receive and when."***

Andy Shilton, Director of Information Services,  
Chartered Insurance Institute



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# Project Approach

Recognise the importance a strong Project Manager to keep to project on track

Don't underestimate the demand for your time, even if you're working alongside a partner

Give the project team the authority to make decisions, particularly for Agile projects

If something isn't working, change it!

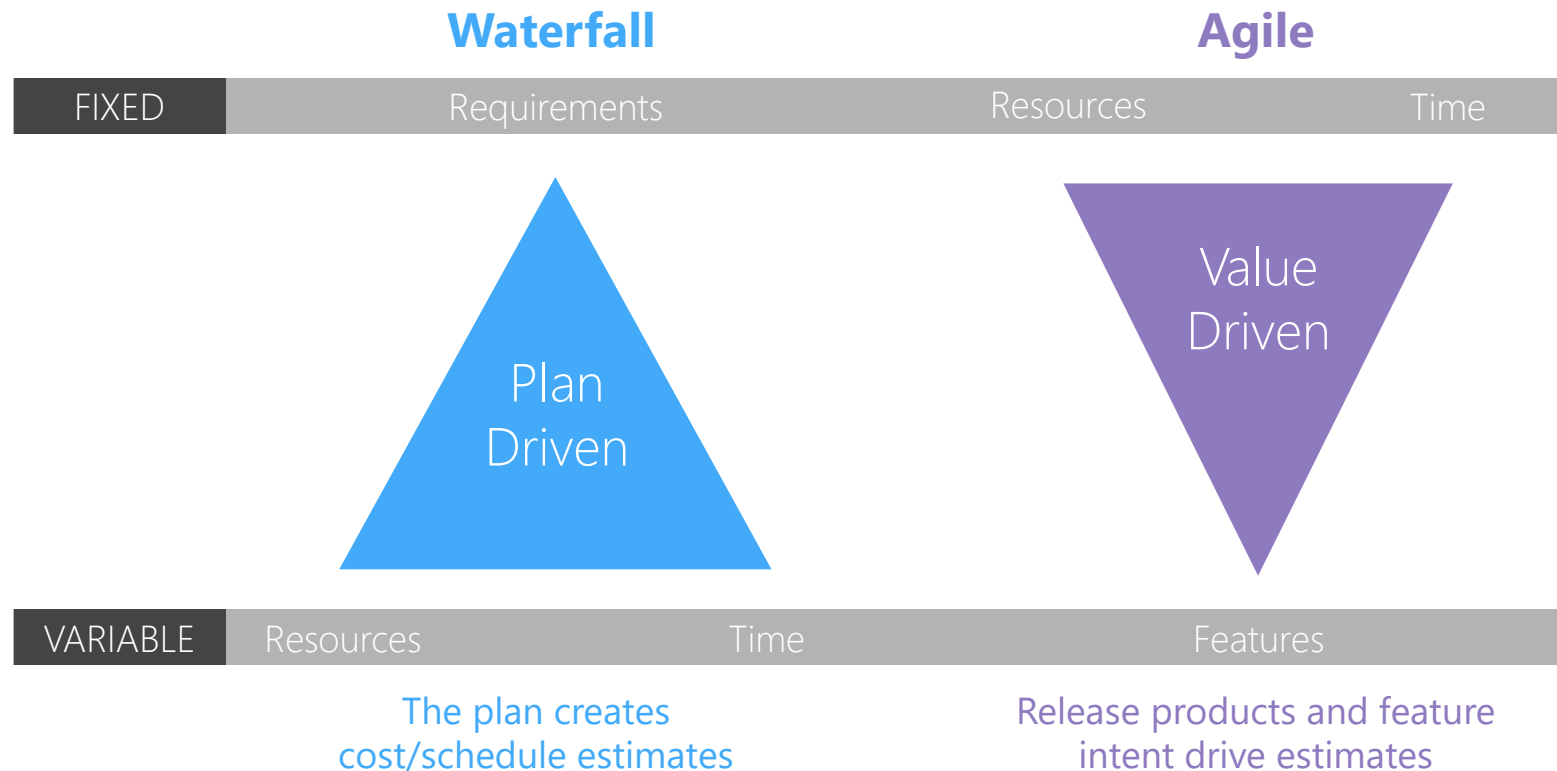
***"Moving to an agile approach really suited us. Most of us aren't technical, so this way of working enables us to see what is being built and check that what we are asking for is exactly what we need"***

Marie Casey, CEO  
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# Agile vs. Waterfall

Choose an appropriate project methodology, and ensure you understand the benefits and constraints of whichever approach you take.





# Go Live

**Ensure adequate training and support for new users is in place**

**Assign a team of CRM champions to represent their team's interests at regular steering groups**

**Create excitement leading up to go-live. Make sure users appreciate what's in it for them**

**Create data stewards to ensure your data stays up to date and in line with policies**



# Business as usual

**Create and follow a change management process**

**Take the time to fully understand the impact of any changes you make**

**Be aware of the changing technology landscape, and prepare for the release of new functionality and features**

**Invest in a Support Partner to be whenever you need them**

# Creating a successful CRM Project

# White Paper



Visit our stand to pick up your copy of our brand new NFP White Paper.

A collection of insights from UK charities and membership organisations about how to improve the success of your digital projects.



Questions?



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