

Client Relationship Management System: Tool Assessment



Situation:

A non-profit organization is uncertain if it needs to repair, re-install or replace its CRM system.

To decision whether-or-not to replace their existing CRM vendor application, a non-profit organization paid for a technology consultant to advise them on the most prudent course of action. The consultant advised that replacement of a CRM tool would be a major undertaking, larger than the budget or time the non-profit could afford, and most importantly, unnecessary to achieve the client's objectives. While other tools might offer incremental improvement in native functional capabilities, the consultant advised the non-profit to prioritize improvement of data quality, which was deemed to be the true shortcoming of their CRM capabilities.

Unconvinced that the tool was not the culprit, business units across the non-profit organization began offering their individual thoughts on alternate vendor platforms, ignoring the paid-for advice to focus on the data within the tool. In the absence of an institutionally recognized tool selection process, business units were competing to position their solution as the next best alternative, rather than working together to determine a path forward.

To objectively arbitrate across the varying opinions, and more importantly, to ensure the organization followed an objective, criteria-based review and selection process for the next generation CRM, the CEO hired Stanton Blackwell to program manage a tool review.

Stanton Blackwell's Role:

Conduct disciplined tool assessments against prioritized business requirements to support decisioning of the option to pursue.

We started by sharing a primer on what it would take to repair, reinstall, or replace the current CRM system, including the relative pros/cons of each. Level setting expectations was important for all in order to understand the level of commitment it would take to truly fix their problems, as many were still convinced fixes could be achieved in 3 months vs. the more realistic 18 months. The result was a decision to run a single cross-business tool assessment and to stop other competing efforts. This up-front agreement was a critical table setting to ensure the discipline of tool assessment and implementation would not be short-changed.

After setting the stage, we took the business requirements that had been previously gathered and shared them with the CRM vendors under consideration. We created a vendor response template with both quantitative and qualitative values to allow for comparable side-by-side assessments.

While the vendors prepared their responses, we worked with the client to pre-define an assessment scorecard of responses received to ensure advanced agreement on how to weigh capabilities and services promised, prior to extending invitations for vendor presentations. It was important to prevent the inevitable sway by bells and whistles that can come when vendors present to their prospective clients.

We advised the client that the next step should be a coordinated vendor evaluation that resulted in a unanimous decision on how to proceed with a tool replacement. Unfortunately, this is where the organization decided to halt its focus on a CRM tool replacement and prioritize replacement of its peer-to-peer solution instead.

The change in priorities proved fortuitous, as our focus was then switched exclusively to addressing the data quality within their CRM tool - a problem we were eventually able to convince our client would be the most impactful to address in order to improve their fundraising efforts.

Result:

The recognition that a CRM tool is as only as good as the data it contains.

After evaluating several CRM solutions, the client was able to recognize that, although there are better tools and worse tools, ultimately a CRM application is only as useful as the data it contains. With this recognition, the client was finally willing to dedicate the needed time and effort to address their CRM data quality issue.



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Alex offers Stanton Blackwell almost 25 years of experience in strategic planning, program management, and project execution, with a specialization in technology governance and operational efficiency. She helps clients simplify a broad scope of issues and opportunities, into a prioritized, impactful and achievable solution roadmap, and then supports its execution.

SIB About Stanton Blackwell

Stanton Blackwell is an advisory firm dedicated to the middle market and mission-based sectors. Our professionals provide operational and financial consulting, as well as leadership development, to address issues of business planning, capital adequacy, scalability and efficiency. We work closely with our clients to adapt to an increasingly complex operating environment and to enhance impact and business value.

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