

# Client Relationship Management System: User Experience



## **Situation:**

**A non-profit organization dependent on its CRM system for its fundraising efforts was experiencing a steady flow of usability complaints from end users.**

The non-profit hoped quick fixes, like designing simpler screens and improving training, would encourage their fundraisers to use their CRM system more actively.

While the organization's fundraisers acknowledged simpler designs would improve their experience, the core reason for limited usage was shown to be relevance. The ten-year-old CRM system reflected business and operational processes from a decade ago when it was first installed. Not surprisingly, that was no longer the way the non-profit did business nor the way its fundraisers operated.

Worse yet, over the years, enhancements to the system were not governed, so development teams were hired by any business unit with a budget. Many system capabilities were introduced that only added to the noise. The system was dying under its own weight.

In the absence of disciplined tool management, there was no blue-print to unwind the spaghetti. Even when fixes were identified, there were no effective means for implementation.

## **Stanton Blackwell's Role:**

**Conduct user experience analysis across the spectrum of users to identify the prioritized pain points and develop a roadmap to address them.**

Stanton Blackwell's task was to peel back the layers of issues to develop a prioritized roadmap for sustainable improvement, increasing CRM relevance and usage and, ultimately, driving end user productivity. The biggest challenge was to get the client to have the patience to invest the time and effort into the right solution, not just a fast one.

Our initial activity involved defining the user population – from power users to “conscientious objectors” - across representative business units, selecting those that would engage in identifying and prioritizing improvement opportunities.

Once we had identified the user audience, we created an inventory of current capabilities based on business process and we assigned a business unit owner to each. The goal was to have subject matter experts identify what was foundational to making the CRM system relevant to their core business and operational processes.

We conducted detailed interviews with end users on the operational and business context of each process. The interviews provided a wealth of insight - both of existing challenges and a wish list of capabilities.

Once the interviews were completed, we rationalized requests across users and developed one comprehensive list of requirements. We categorized them based on impact, complexity, and effort, ultimately sequencing them into a prioritized roadmap. The roadmap was validated by both the client's in-house technology team and the third-party CRM application vendor's release schedules already in place. The key to the roadmap was the focus on leveraging the system's native capabilities in order to reduce the effort and cost of development, and to facilitate ongoing maintenance and enhancements.

Finally, we circled back to the end users initially interviewed with a "We Heard You" campaign. It highlighted all the enhancements that were planned, when they would be available, and demonstrated "before and after" scenarios, underscoring the increased productivity users would begin experiencing. The campaign was distributed to all staff and was accompanied by refreshed training.

## Result:

### A prioritized roadmap of improvements to drive greater CRM adoption.

We were able to effectively engage end users on an out-of-date CRM solution and, through process focused analysis, develop a set of requirements to dramatically improve the capabilities and relevance of the system in support of the fundraisers' core operational needs.

The requirements were turned into a roadmap that served as a blueprint for significantly improving the business value of the non-profit's CRM system in support of its fundraising efforts.



**Contributor: Alex Zawadiwsky**

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.

## S|B About Stanton Blackwell

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