



UNIVERSITY OF SAN FRANCISCO  
CHANGE THE WORLD FROM HERE

MASTER OF NONPROFIT ADMINISTRATION

# Implementation of CRM Strategy Within the Nonprofit Sector:

Toolkit focused on change management to enhance adoption.

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Class 662: Nonprofit Data Analysis

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# OVERVIEW & PURPOSE

- The project generates a toolkit that serves as a blueprint for organizations planning to adopt Customer Relationship Management (CRM) technologies in an effective and aligned manner.
- The project explains the challenges within the management of people during adoption and other relevant considerations.
- As societal problems become more complex, innovation in various forms becomes critical.
- This analysis gives me great insights into the relationship of technology and people during change.



# PROJECT OBJECTIVES AND VALUES

## Values

- **Innovation:** As the pandemic accelerates digitalization, furthering data literacy and reporting is critical to acquire funding. By leveraging the capabilities of a robust database marketing can accelerate and recruit more donors.
- **Transparency and Accountability :** The blueprint includes a model to choose the commitment level staff requires. Bringing all staff to buy in in different levels will bring fairness in the work division while implementing and maintaining the data entry. The division of work load in to prevent having front line staff spending more than 50% of their time entering data.

## Objectives

- Analyses and compare experts framework and adapt it to the realities of small nonprofits that do not have a CRM in place.
- Create ethical and managerial considerations withdraw from the data analysis of qualitative interviews expert interviews.

# METHODS AND APPROACHES

- The data was collected with a mixed method approach
  - Review of current literature
  - Qualitative interviews
    - **Michelle Reiss-Top**, Data & Evaluation Director at MEDA
    - **Zeina Saad**, Sr Consultant at Exponent Partners
    - **Dave Byrd**, Sr. Advisor at Capacity Blueprint

## Implementation of CRM strategy within the Nonprofit Sector Expert Interview Questionnaire

- **Professional Background:**
  - How long have you been working in the Public sector, specifically with donor base roles?
  - Is it a collaborative role? Ex. you need a bird' eye view to understand the process or budgeting?
- **Implementation**
  - What approach has been successful?
  - Do you have a planning committee?
- **Commitment**
  - How was the commitment from leaders portrayed?
  - Did you explain to employees the value? time/ money
  - Were you transparent on the risk (money and time) of a failed CRM implementation?
  - How do you handle resistance to change?
  - If you were to mention a factor that was missing or overlooked what would it be?
- **Ethics**
  - Fundraising and Philanthropy – Grant requirements?
  - CRM skepticism in the nonprofit sector
- **Overhead**
  - Recruiting, training, and innovation



# DATA ANALYSIS - Qualitative Expert Interviews

## Ethical Considerations

- Data driven culture indirectly furthers the income gap on the sector.
- Involve Grant Writer to avoid stagnation in the innovative side.
- AI CRM in the for-profit and the need to regulate, future implications to the nonprofit.

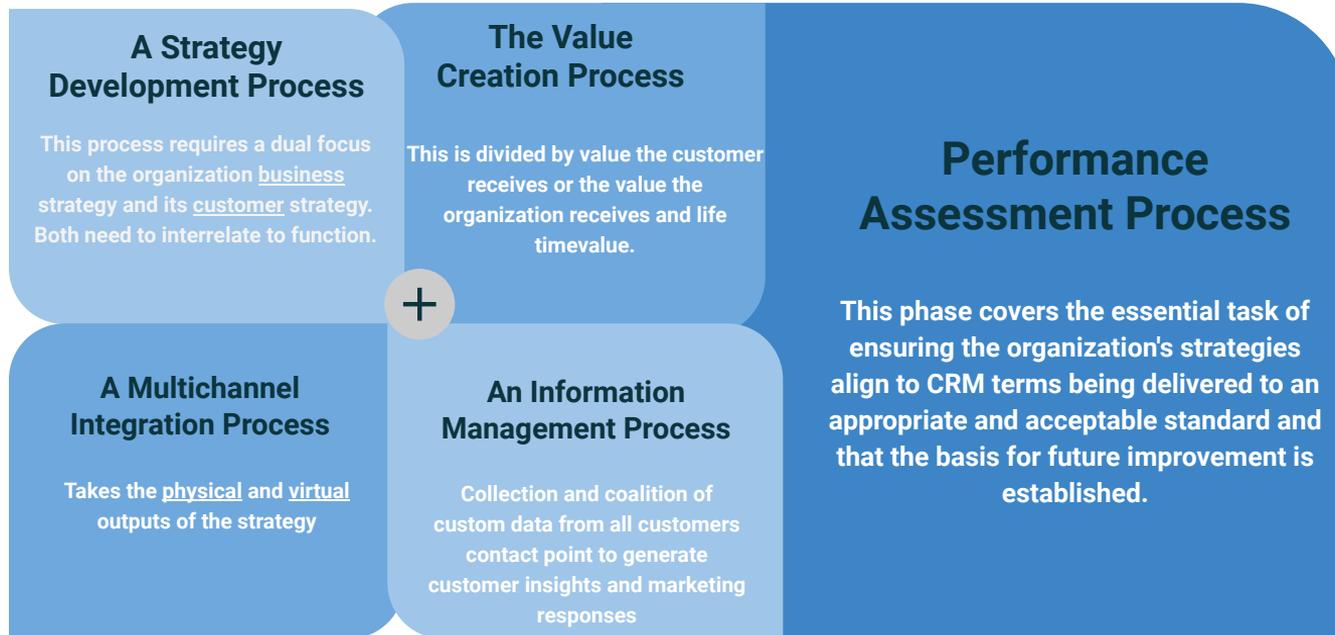
## Systems in Place

- A safe and open culture where the frontline providers can recommend solutions.
- A collective or one individual with a entrepreneurial mindstate.
- Correct definitions to assert the right strategy.

## Risk Factors

- Adoption and maintenance are key for success.
- Recruit and develop staff to focus on data management and become super users.

# DATA ANALYSIS - Strategic Frameworks (Payne and Frow)



Kristoffersen Line, & Singh Sangeeta. (2004). Successful Application of a Customer Relationship Management Program in a Nonprofit Organization. *Journal of Marketing Theory and Practice*, 12(2), 28–42.

# LEVELS OF COMMITMENT

## Ownership

- Demonstrated commitment to the process and the promotion of it.
- Individual feel responsible and accountable for its success.

## Buy-in

- Agreement with the concepts and ideas presented.
- Verbal expression of support.

## Understanding

- Demonstrated understanding of the process/product.

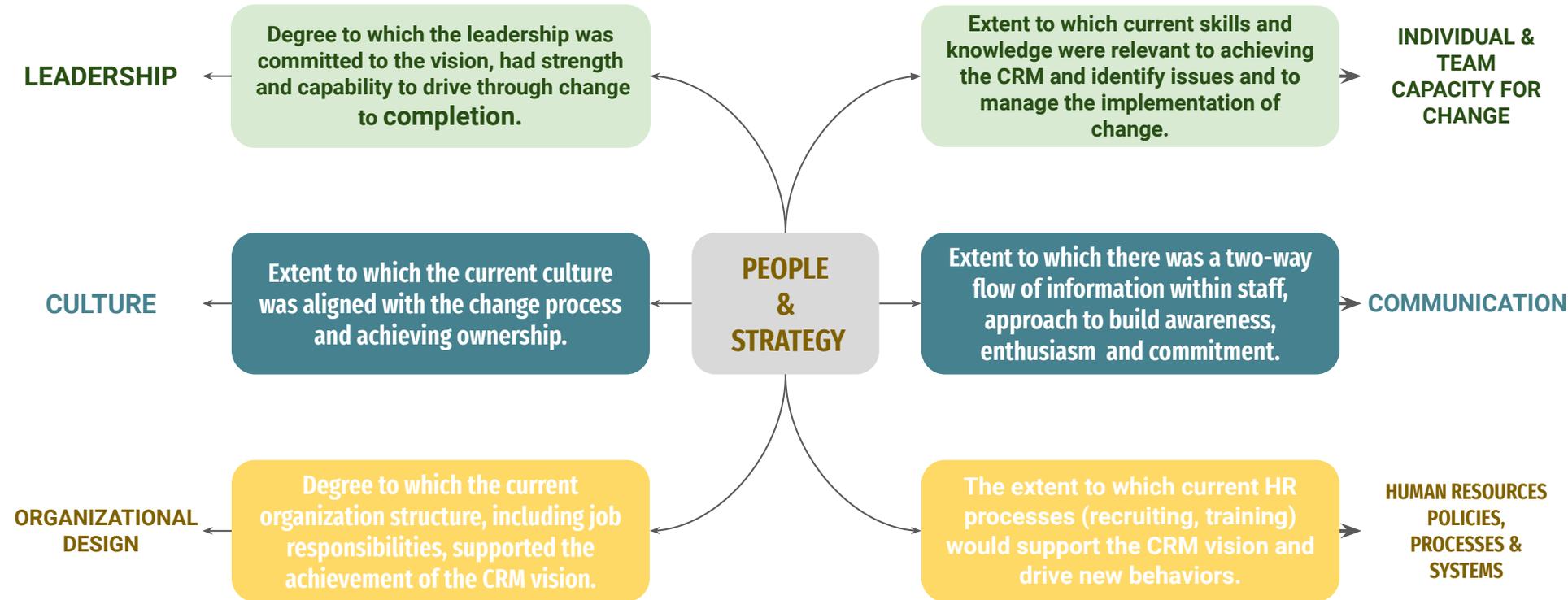
## Awareness

- Aware of process without necessarily understanding or supporting them.



Kristoffersen Line, & Singh Sangeeta. (2004). Successful Application of a Customer Relationship Management Program in a Nonprofit Organization. *Journal of Marketing Theory and Practice*, 12(2), 28–42.

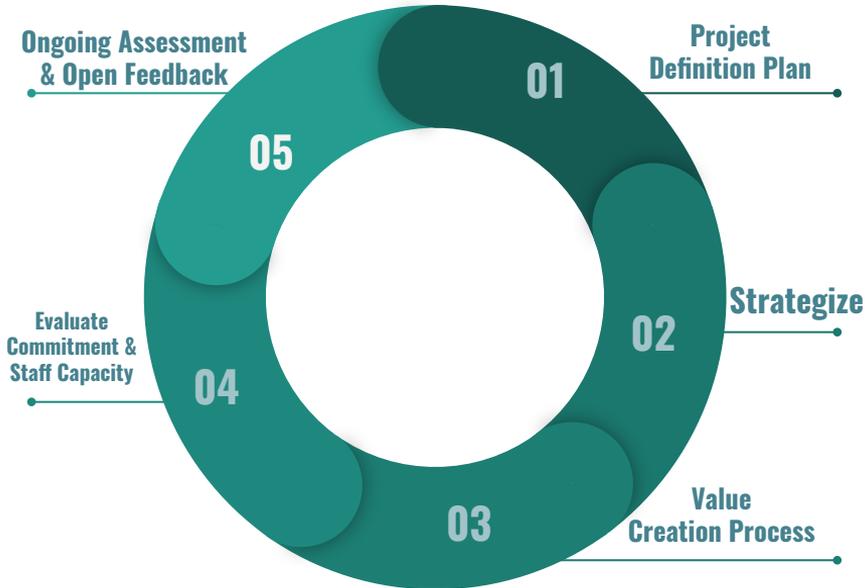
# SIX KEY DIMENSIONS IN CHANGE READINESS



# MODEL WITH RECOMMENDATIONS

Foster a safe environment where staff can voice what is working for them. Re-evaluate and consider changing roles or processes.

Even if you need all the staff committed not all have the capacity. Try allocating them in a level of commitment that does not interrupt their purpose.



Get the team habituated to define the purpose, goals and key success factors of the project meshed with their mission.

Merge CRM strategy with the strategic plan. In the course of the design engagement, conduct field-research and in-depth interviews preferably with a human-centered design approach.

Think about how the implementation can empower staff and community avoid centering funding entities to acquire most of the focus.



## SUMMARY

Customer Relationship Management (CRM) can be the tool that retains donors and avoids churns with personalized marketing. However without the right skills, organizations are destined to waste time and resources. There is no precise blueprint to achieve such mastery, only the right strategy and maintenance as times get more complex. This capstone focuses on the people factor management of a CRM implementation strategy. It analysis how can achieve buy-in from staff taking in consideration the realities of the nonprofit sector.

## PURPOSE

- **Awareness:** To alert leaders about the unavoidable challenges that can bring a faulty implementation that misses to get buy in from staff. While alerting into the future of AI CRM spill over into the nonprofit.
- **Solutions:** Models that foster an entrepreneurial safe environment that can pivot when necessary. Intent to disrupt grant making culture and prove funders the fair chance of a full grant to hire a data person.

## RESEARCH

What are the current tactics to motivate adoption and ensure an effective transition to CRM technology?

## METHODS

- Literature Review
  - Three Expert Interviews
- Michelle Reiss-Top**, Data & Evaluation Director at MEDA  
**Zeina Saad**, Sr Consultant at Exponent Partners  
**Dave Byrd**, Sr. Advisor at Capacity Blueprint

## DATA AND ANALYSIS

### Qualitative Expert Interviews

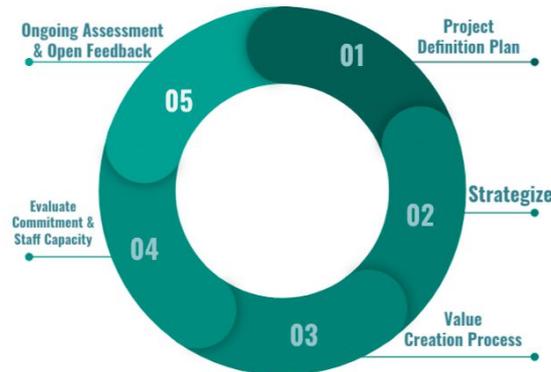


## RESULTS

### Model & Recommendations

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Get the team habituated to define the purpose, goals and key success factors of the project meshed with their mission.

Merge CRM strategy with the strategic plan. In the course of the design engagement, conduct field-research and in-depth interviews preferably with a human-centered design approach.

Think about how the implementation can empower staff and community avoid centering funding entities to acquire most of the focus.

## RECOMMENDATIONS

- Ongoing research on entrepreneurial motivations within non-profit sector.
- Engage Development Leaders to include CRM requests in their fundraising and philanthropy strategic plan.
- Use Human-centered design to evaluate and design the adoption.

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