

Ten Mistakes to Avoid

Connecting Up
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Intro

- ▶ Professional experience
- ▶ FundraisingForce
- ▶ Fundraising strategy
- ▶ Technology
- ▶ CRM searches
- ▶ CRM implementations



Agenda

- ▶ Assumptions for presentation
- ▶ Mistakes in tech searches
- ▶ Mistakes in tech implementations
- ▶ Costs of the mistakes
- ▶ Mitigation strategies/steps to avoid
- ▶ Questions

Thank You

Assumptions

- ▶ Most organisations represented here today are conducting a search for technology
- ▶ Most organisations represented here today are implementing technology chosen
 - Let's test those assumptions...

Poll

- ▶ Is your organisation in the process of searching for new technology?

Poll

- ▶ Is your organisation in the process of implementing new technology?

Mistakes - Tech Searches

- ▶ Not considering functional requirements of our end users
- ▶ Choosing technology that cannot manage organisation growth
- ▶ Lack of integrations
- ▶ Lack of defined business processes
- ▶ Lack of defined KPIs

Mistakes - Tech Implementations

- ▶ Lack of strategy
- ▶ Lack of user adoption
- ▶ Lack of vision
- ▶ Considering project is all about *buttonology*
- ▶ Poor planning
- ▶ Scope creep
- ▶ Lack of training
- ▶ Lack of support
- ▶ Wrong supplier(s)
- ▶ Choosing wrong solution
- ▶ Too much, too soon
- ▶ No metrics for success

Mistakes - Tech Implementations

- ▶ Failing to involve end users
- ▶ Lack of executive buy-in
- ▶ Messy data, lack of trust of data
- ▶ Considering it a technology implementation, rather than business implementation
- ▶ CRM is not the central focus
- ▶ CRM is considered finished at Go-live

Costs

- ▶ Functionality does not match business requirements
- ▶ Outgrow technology chosen
- ▶ Systems do not talk to one another
- ▶ Budget over-run
- ▶ Time over-run
- ▶ Lack of trust, faith
- ▶ Low user adoption



Mitigation Strategies

- ▶ Start with your business processes and functional requirements
- ▶ Involve and engage end users
- ▶ Choose *correct* technology and the *right* partner(s)
- ▶ Engage professional project management
- ▶ Focus on the data
- ▶ End with the business processes




Questions?

Contact me

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