



Oregon State University
Foundation



**TO GO LIVE
& BEYOND**

Quiz : Question 1

- How many here are planning or in a CRM Migration in the next 2 years?





Oregon State University
Foundation

THE CAMPAIGN FOR OSU



Agenda

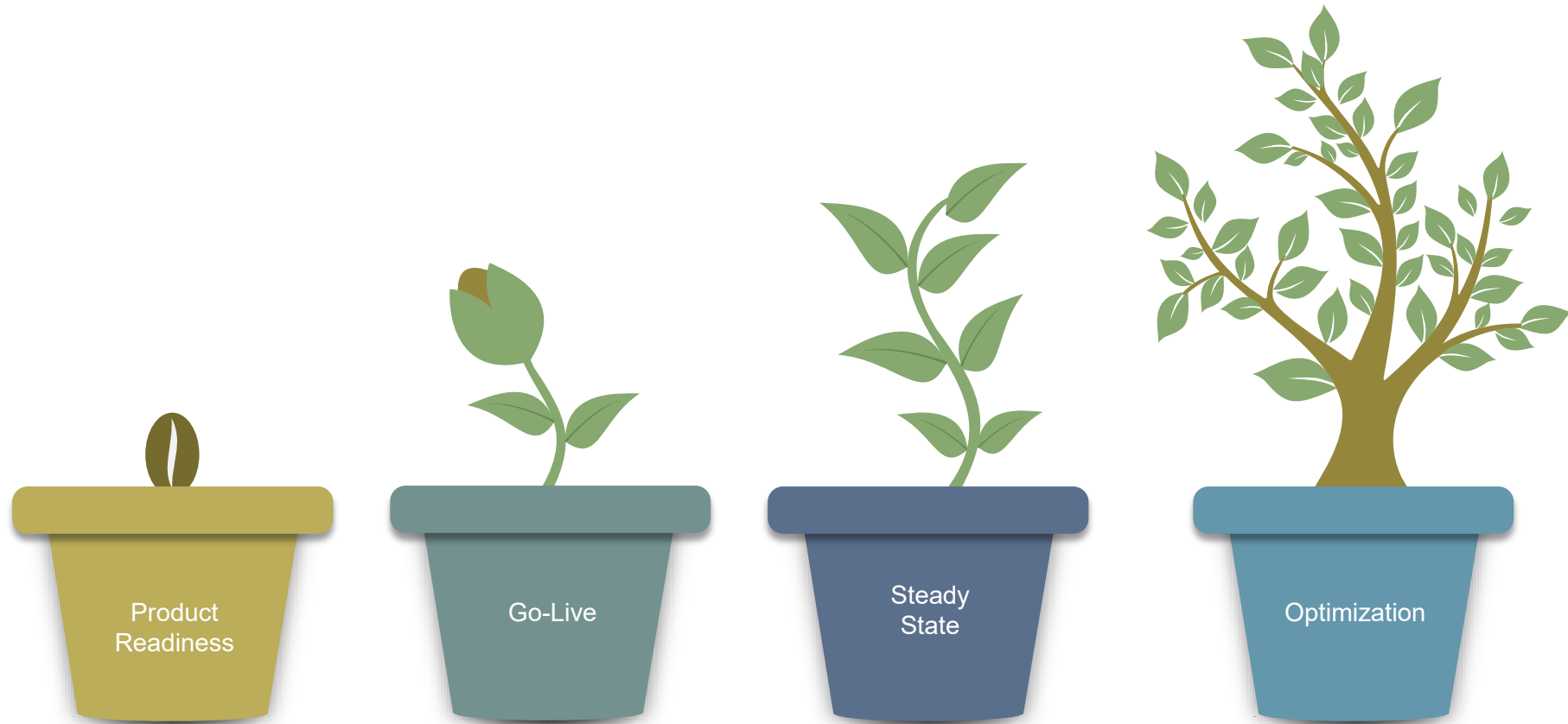
- The Journey Framework
 - Overview of Phases
 - The Business Plan – So you want a new system?
 - The Case for Change
 - Keys to Success
 - Organizational readiness
- Project Structure
 - So you have a new system to implement / People Process Tools
 - Vendor Management - You control your destiny
 - Communications and outreach
 - Team Structure – people
 - Processes – group facilitations
 - Reporting and Integrations
 - Great Expectations
- Change Management
 - Team Structure
 - Training
 - Change management keys



[This Photo](#) by Unknown author is licensed under [CC BY-SA](#).

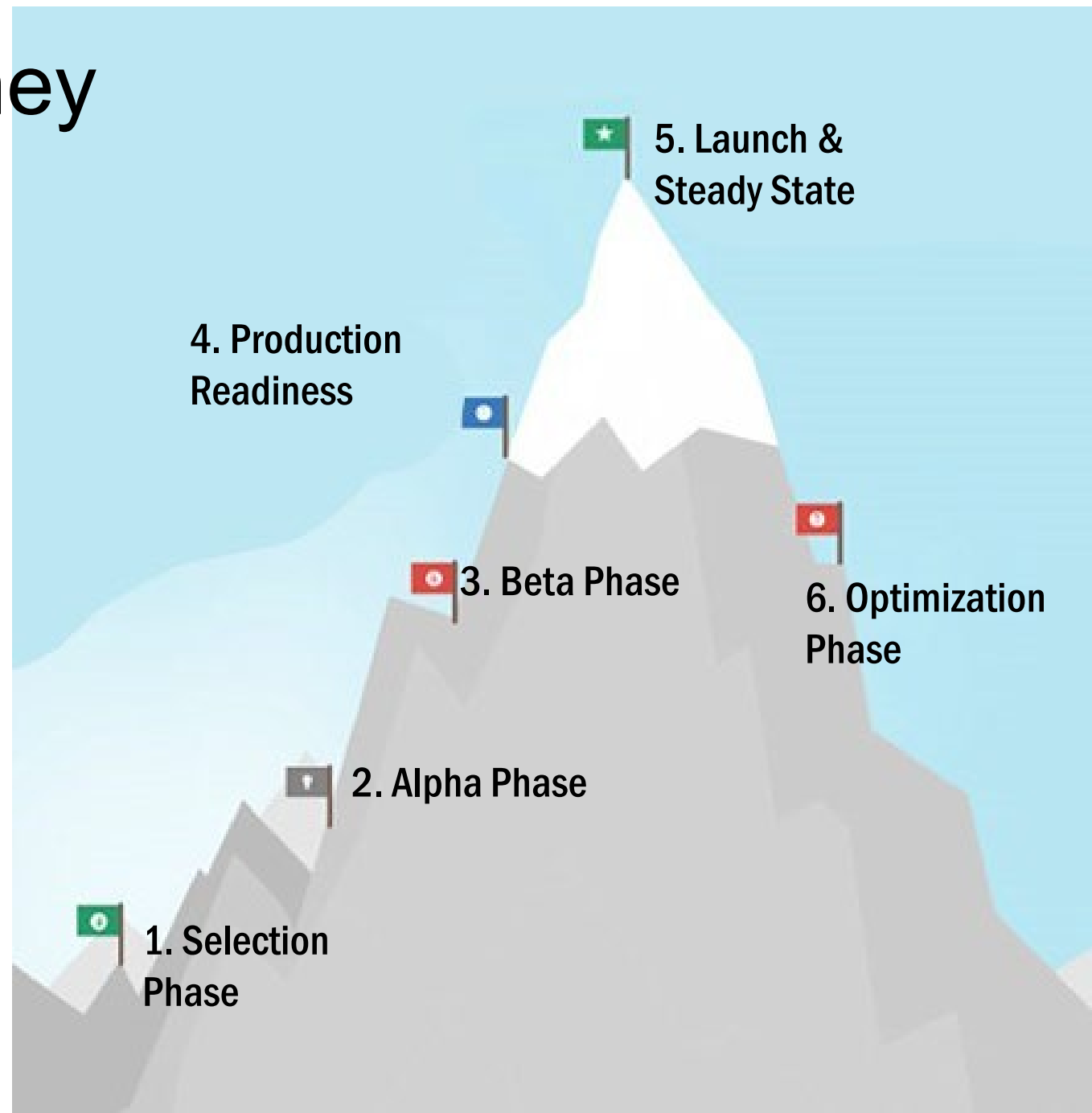
This isn't your father's Oldsmobile |

CRM Implementation Phases



OSUF's Project Journey

1. Selection Phase: 2013 – 2014
2. Alpha Phase: 2014 – 2015
3. Beta Phase: 2016 – 2017
4. Production Readiness: 2017 – 2018
5. Steady State: 6 – 8 weeks
6. Optimization Phase: 2018 - 2020



Business Plan - The Case for Change

- Lifeblood of our work
- 18 year old system
- No upgrades since 2006
- Significant cost annually just to keep the lights



Business Plan - Our Keys to Success

1. Fully supported baseline technology that will serve today's and tomorrow's needs
2. Constituent Relationship Management system (CRM) for more efficient development staff experience
3. Greater and easier access for Foundation, Alumni Association, campus and affiliated partners

A Significant Challenge?

“50-80 percent of CRM implementations FAIL”

(source: Gartner.com)

Why?

- It's just one piece of the puzzle... People, process & tools
- A focus on technology, instead of strategy
- Ignoring the change management perspective
- Underestimation of the quality of the data in the old system
- The Vendor

Quiz : Question 2

- How many here have a clear vision/business case of the conversion?



Organizational Readiness



Degree of Senior Leadership Support.



Timeframe of deployment

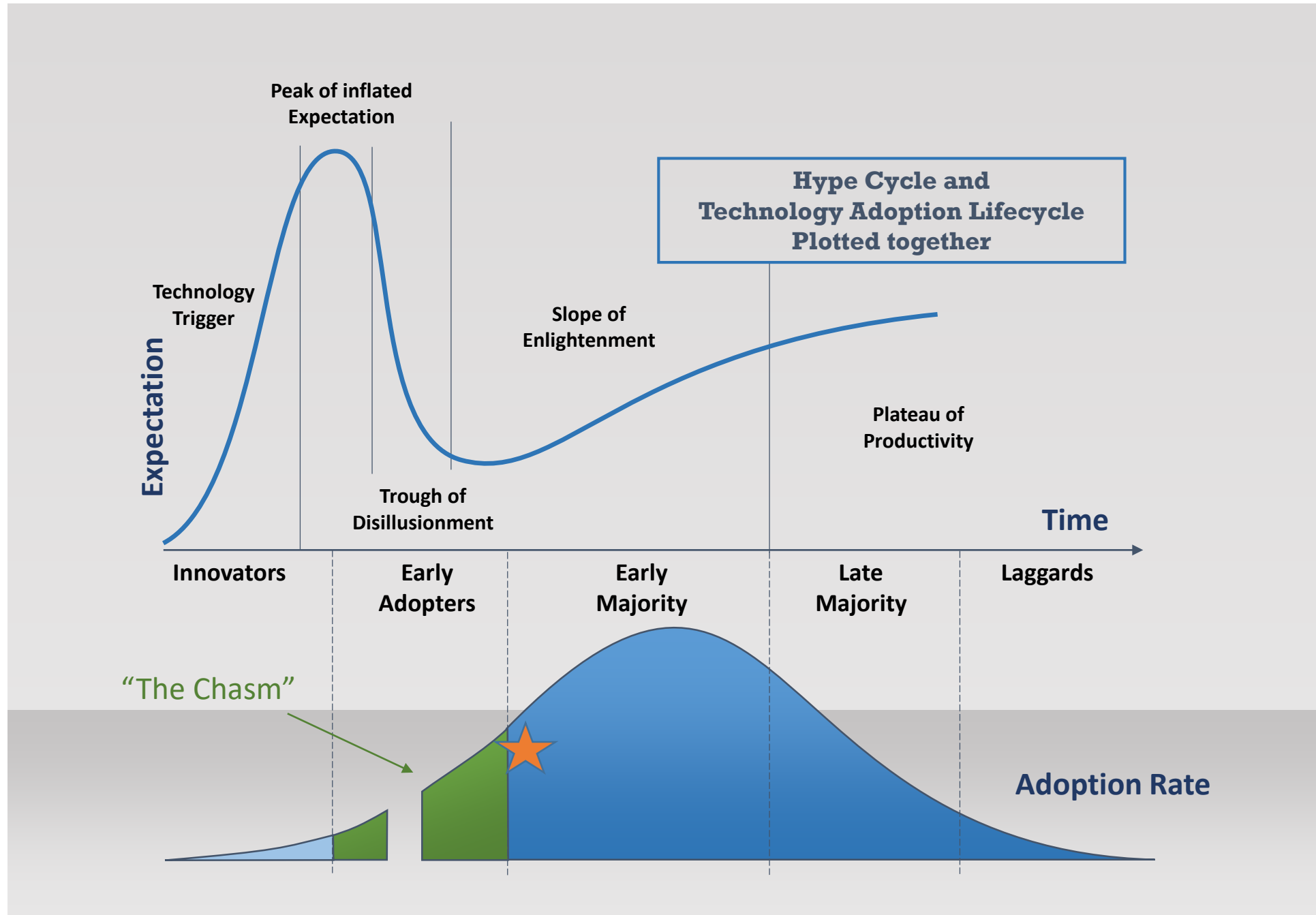


Number of competing projects



Appetite for transformational change.

CRM Advance Hype Cycle vs Adoption



Homework

- Organizational Readiness Scorecard.

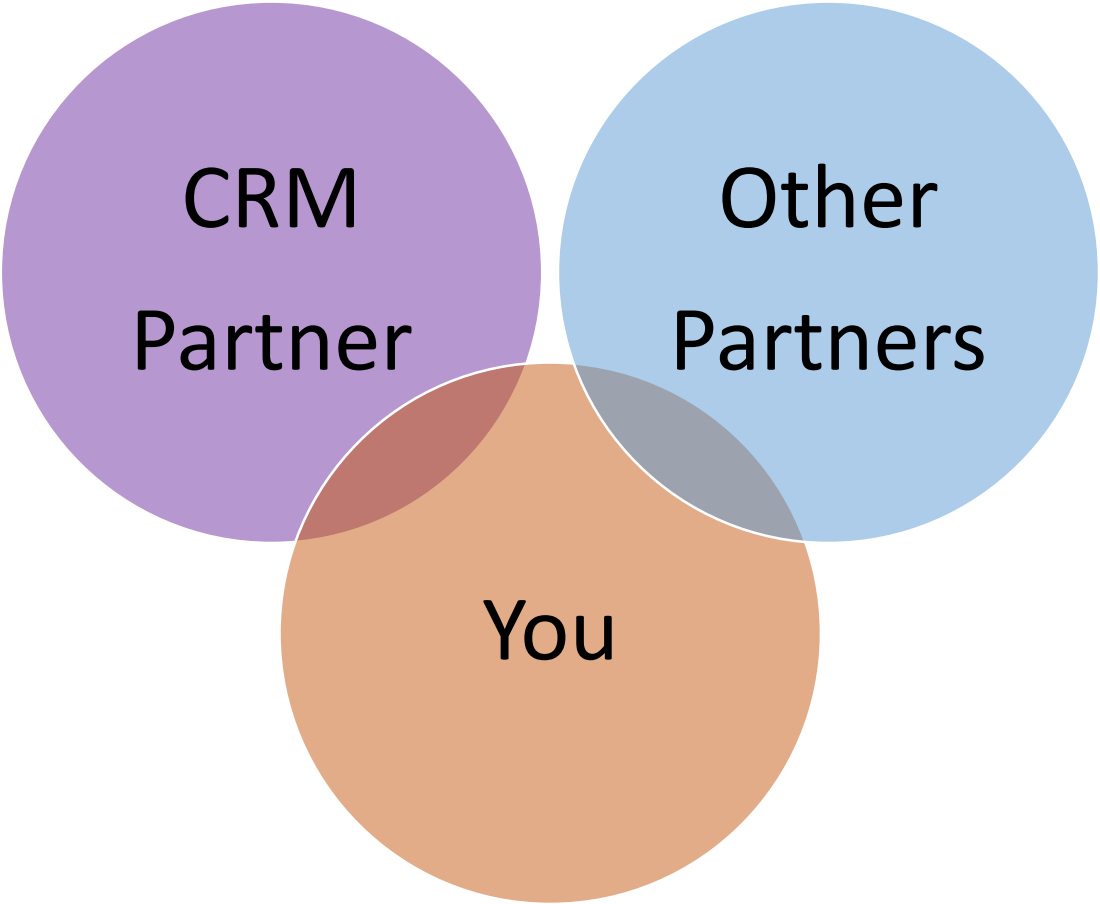


Product Readiness



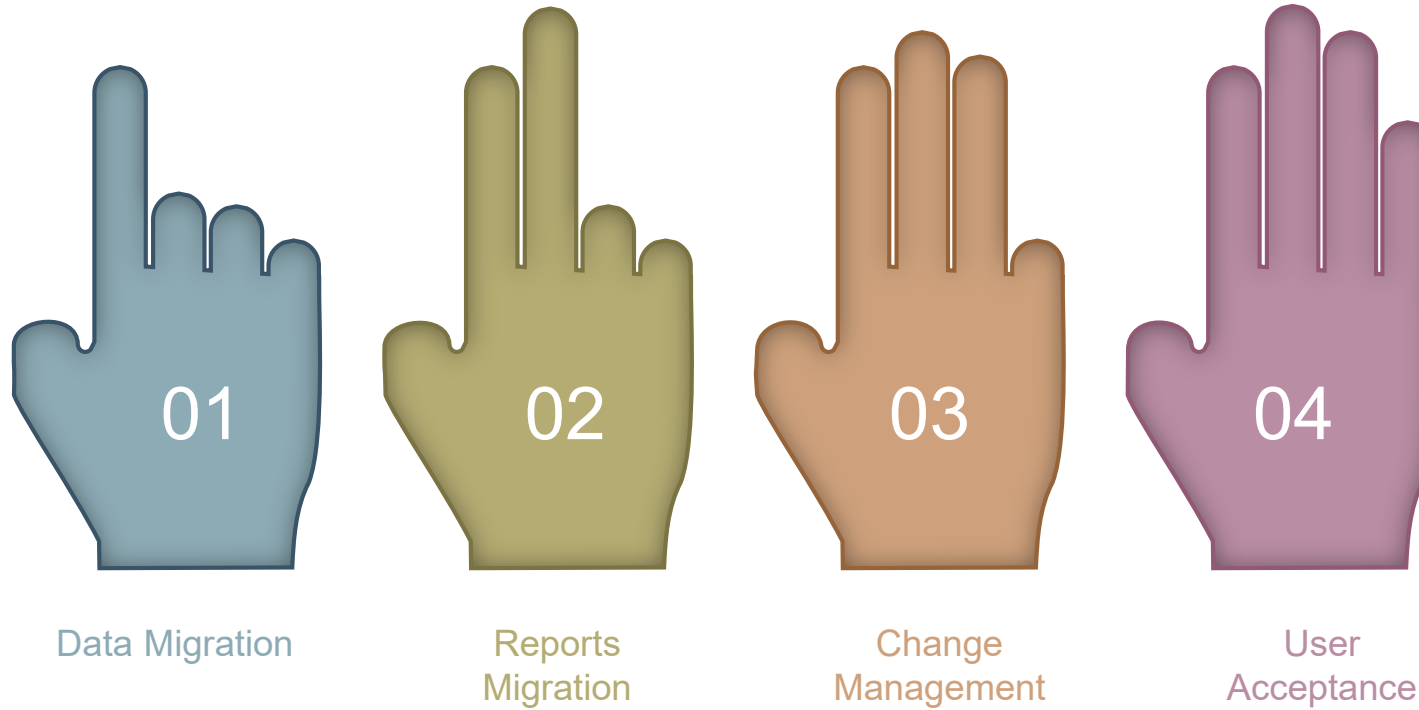


Vendor Partnership



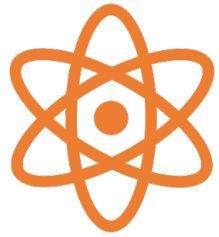


Levers You Control

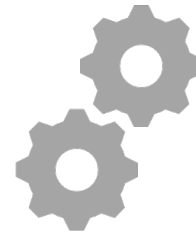




How will Go-live look like?



Big Bang

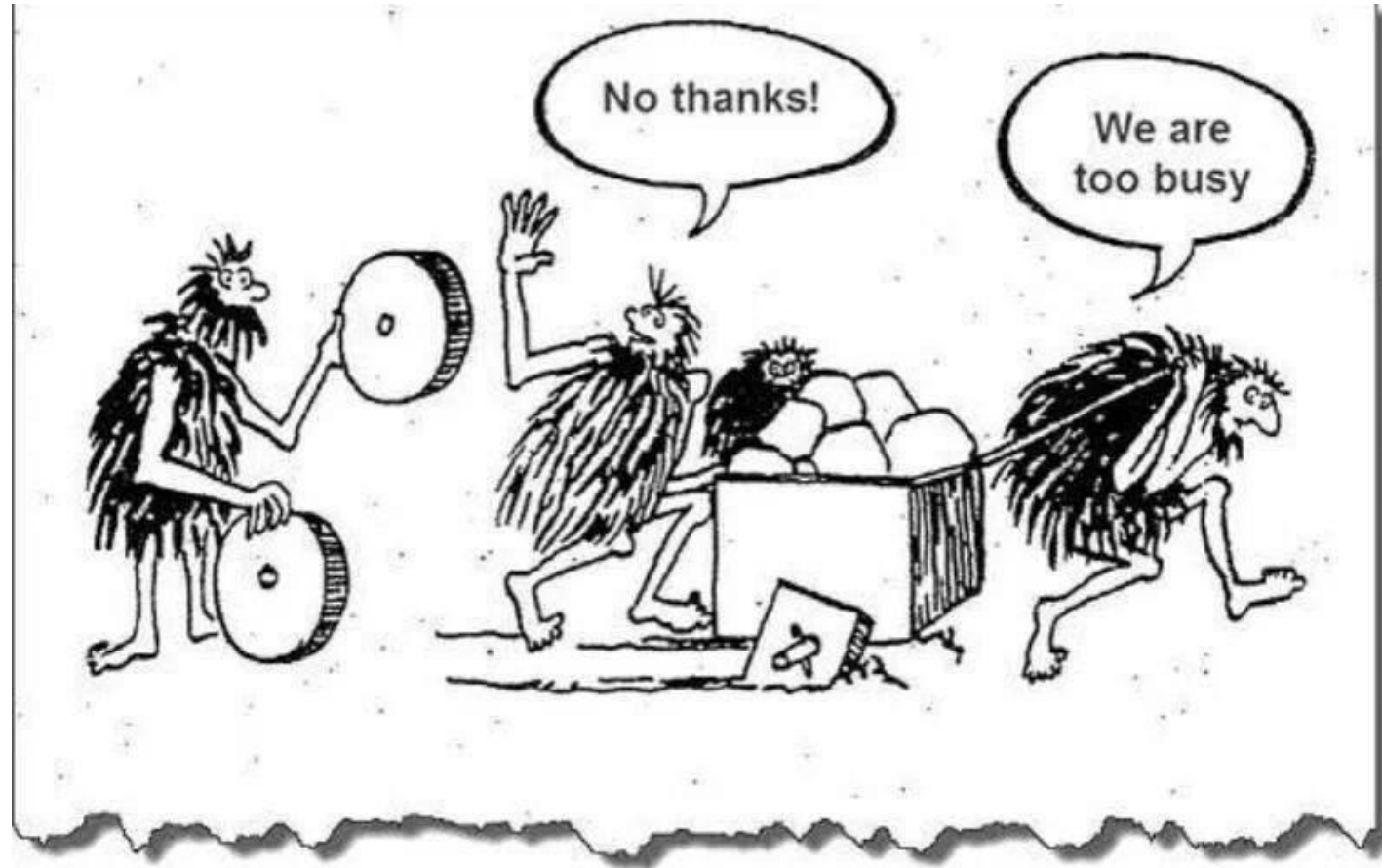


Parallel Systems

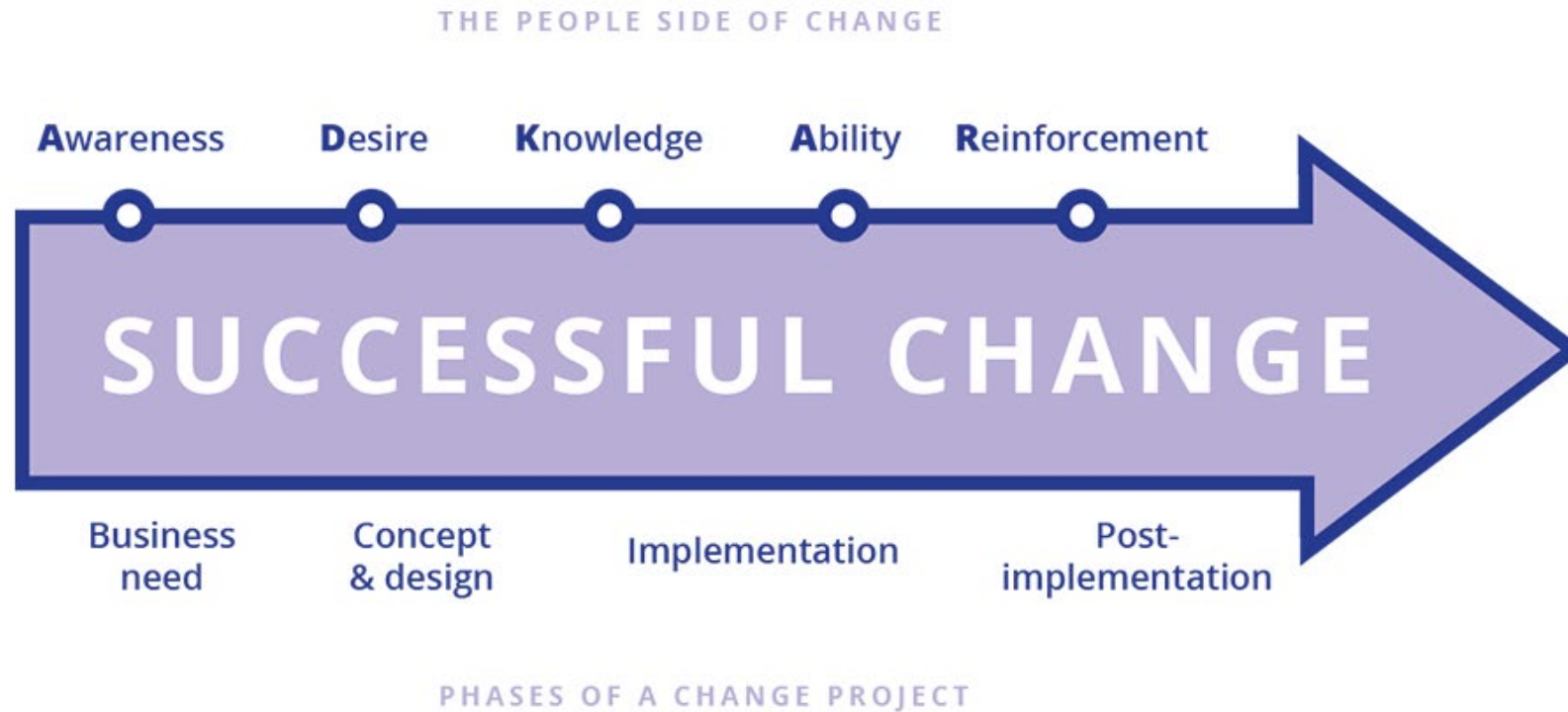


Phased Introduction

People, Process & Tools



ADKAR - Change Management Model



Agile Project Management Structure

1

High Level
Planning

2

Small, high-
functioning,
collaborative
teams

3

Continuous
feedback

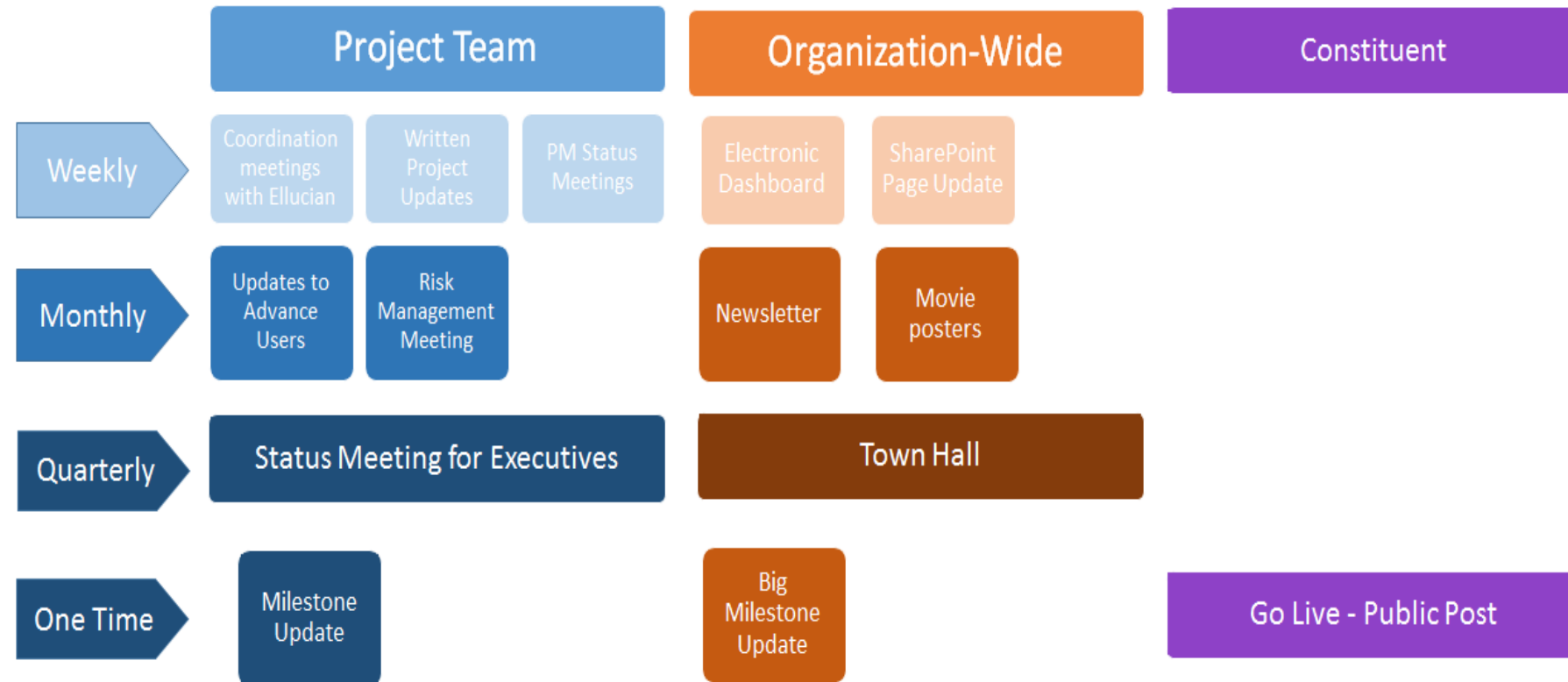
4

Iterative and
incremental
development

5

Prioritized
backlogs

Communication Plan



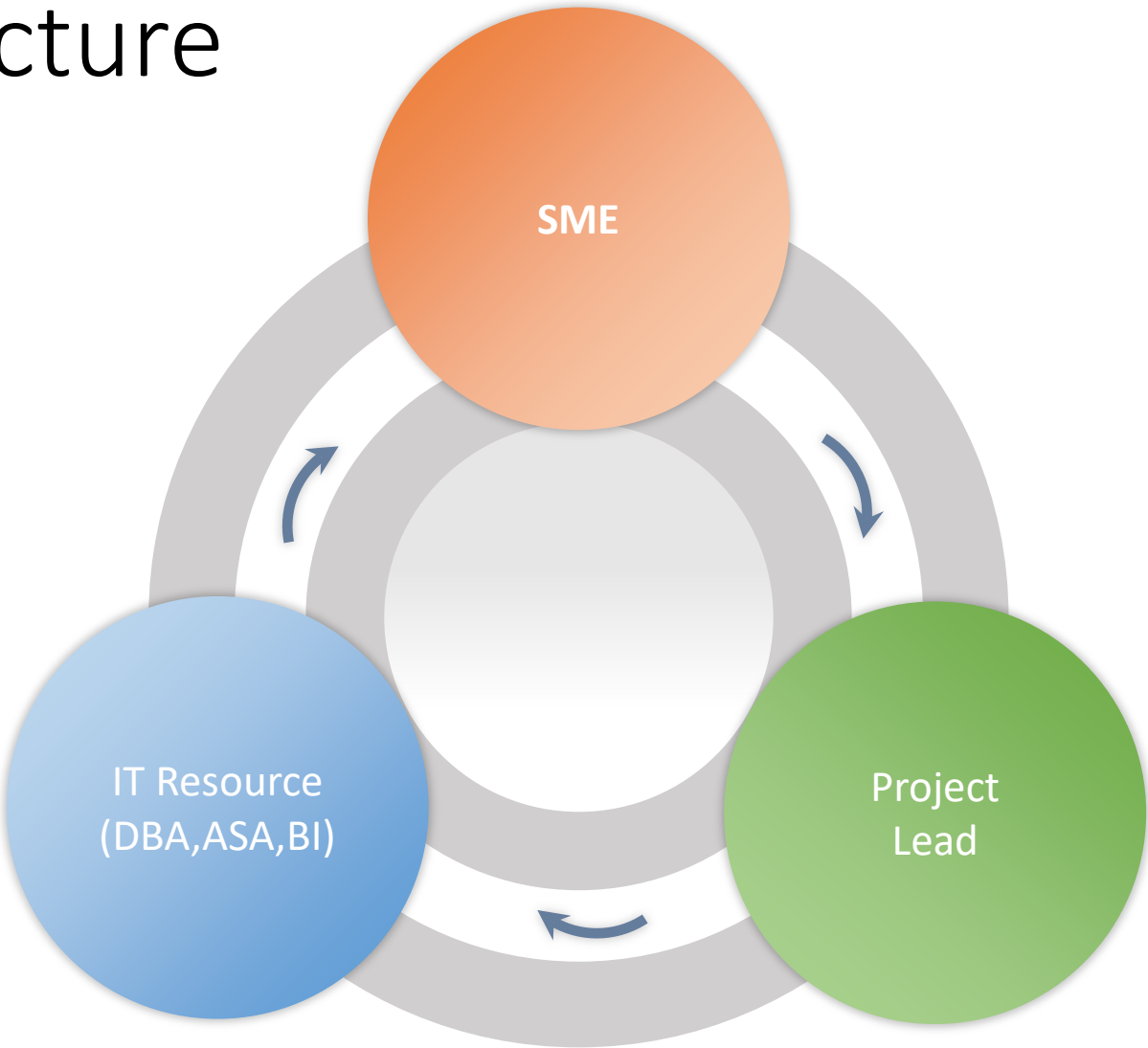


Telling Stories





Team Structure



Implementation Facilitation



Database Readiness



How clean is your data
?



Multiple definitions for
data



Custom Entities



Business process that
misuse data definitions
or intended purpose

Reports and Integrations Overview

- Create an Inventory of all reports and integrations
- Negotiate what needs to be available at go-live
- Phase out reports and integrations into steady state and optimization phases

Reports & Baseline Integration Strategies

Like-to-Like

Resources++
Time++

Risk –High

Not Advised

Hybrid Approach

Resources++
Time++

Risk – High

Optimal

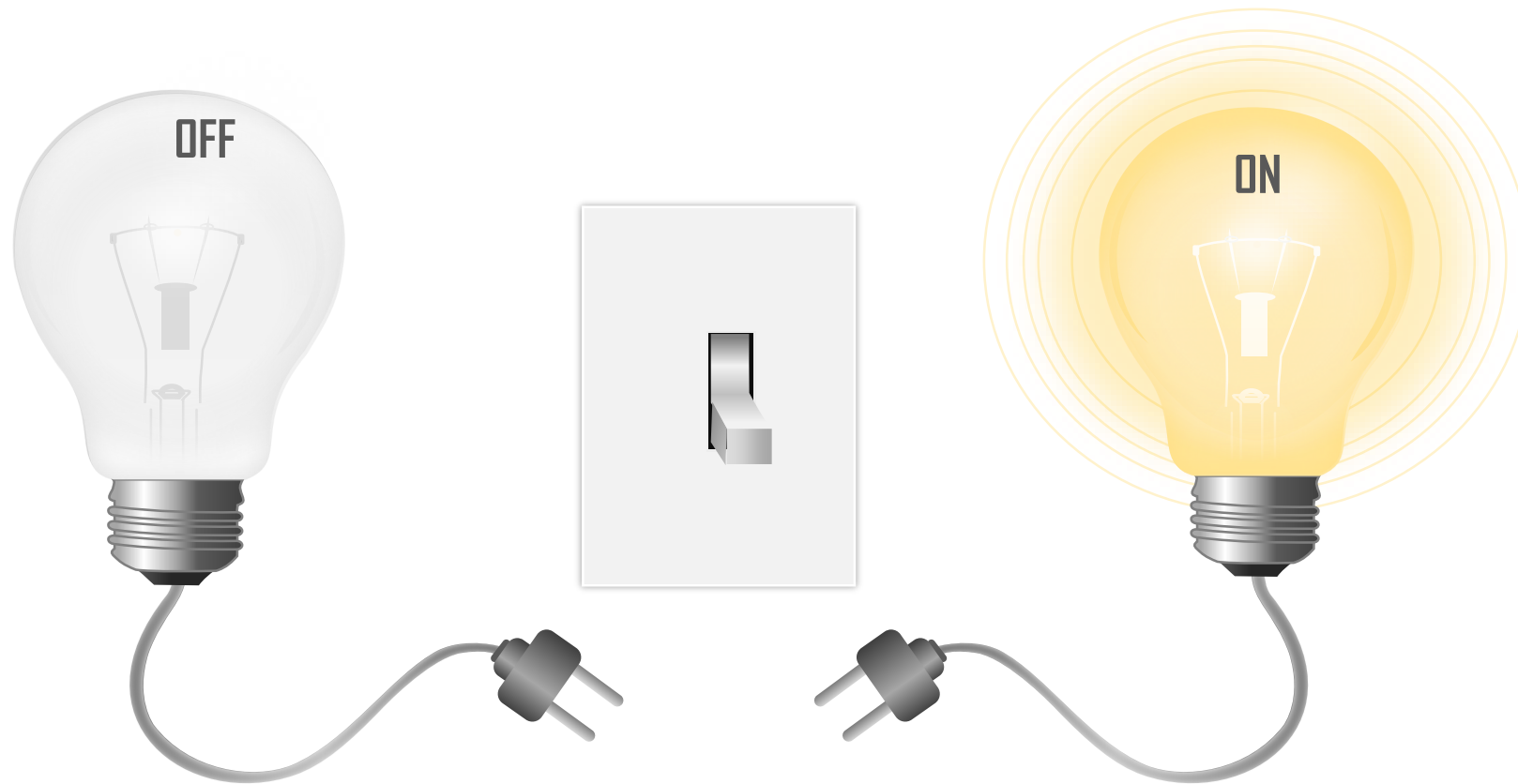
Start from Scratch

Resources+++
Time+++

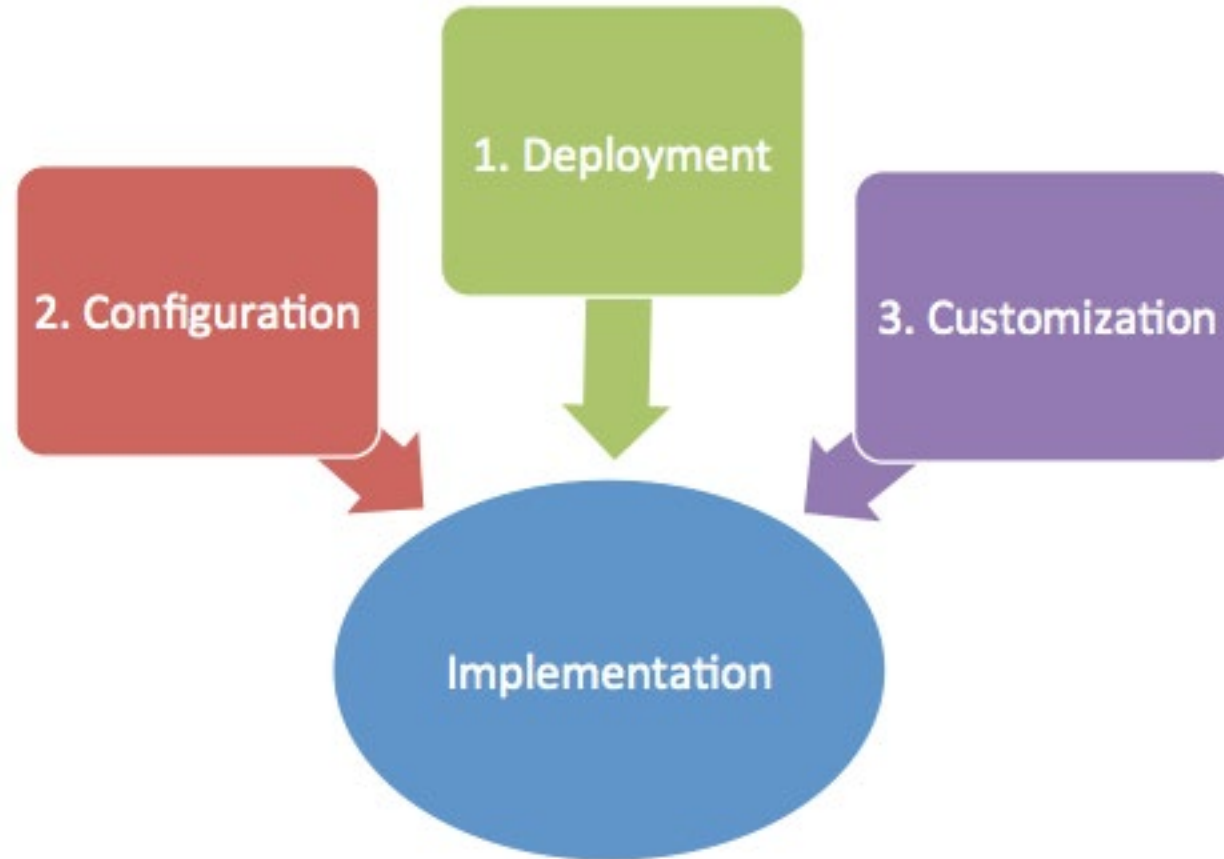
Risk –Very High

Not Advised

Reports & Baseline Integration Tactic



Configuration and Customization



On Go Live – Jan 17th ,2018

- Fundraisers Mobile Ready Day one.
- All staff have been through multiple workshops.
- 39 Core Reports available from the data warehouse.
- Integration to Financial System(Financial Edge), iModules, CampusCall
- No blocker data issue.

5 Ways to Guarantee your CRM Conversion Project Fails

- Approaching the Conversion like a One-time project
- Forcing Double Entry
- Keeping the CRM System Generic
- Putting IT exclusively in charge and responsible for the success of the project
- Allowing silo databases to continue.

Change Management

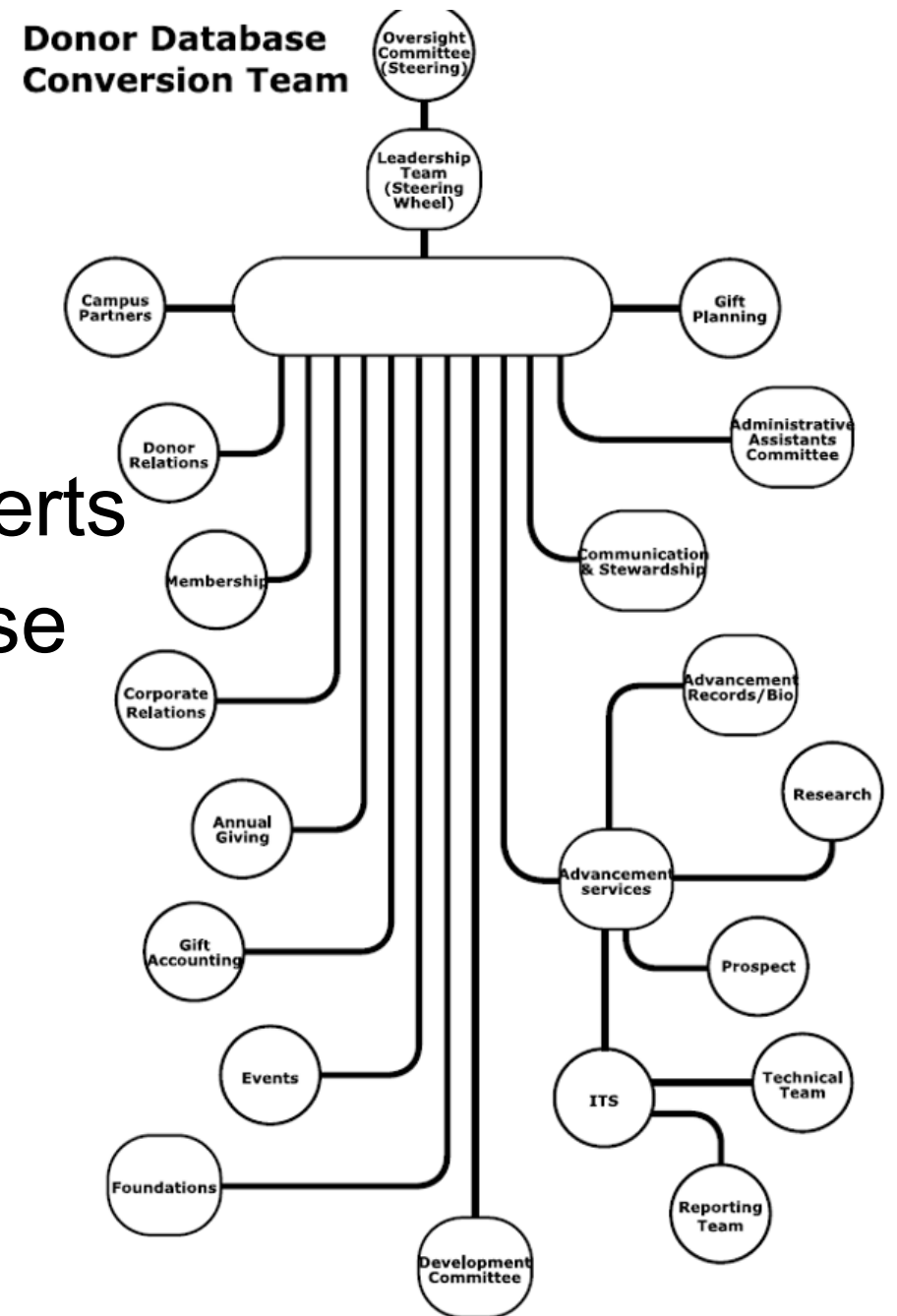
“Change management as it is traditionally applied is outdated. We know, for example, that **70 percent** of change programs fail to achieve their goals, largely due to employee resistance and lack of management support.”

Our Change Management Keys

- Strong leadership support from the top
- Build empathy, community and shared purpose
- Personalize the experience
- Sophisticated Adoption Program including a 21st century training plan

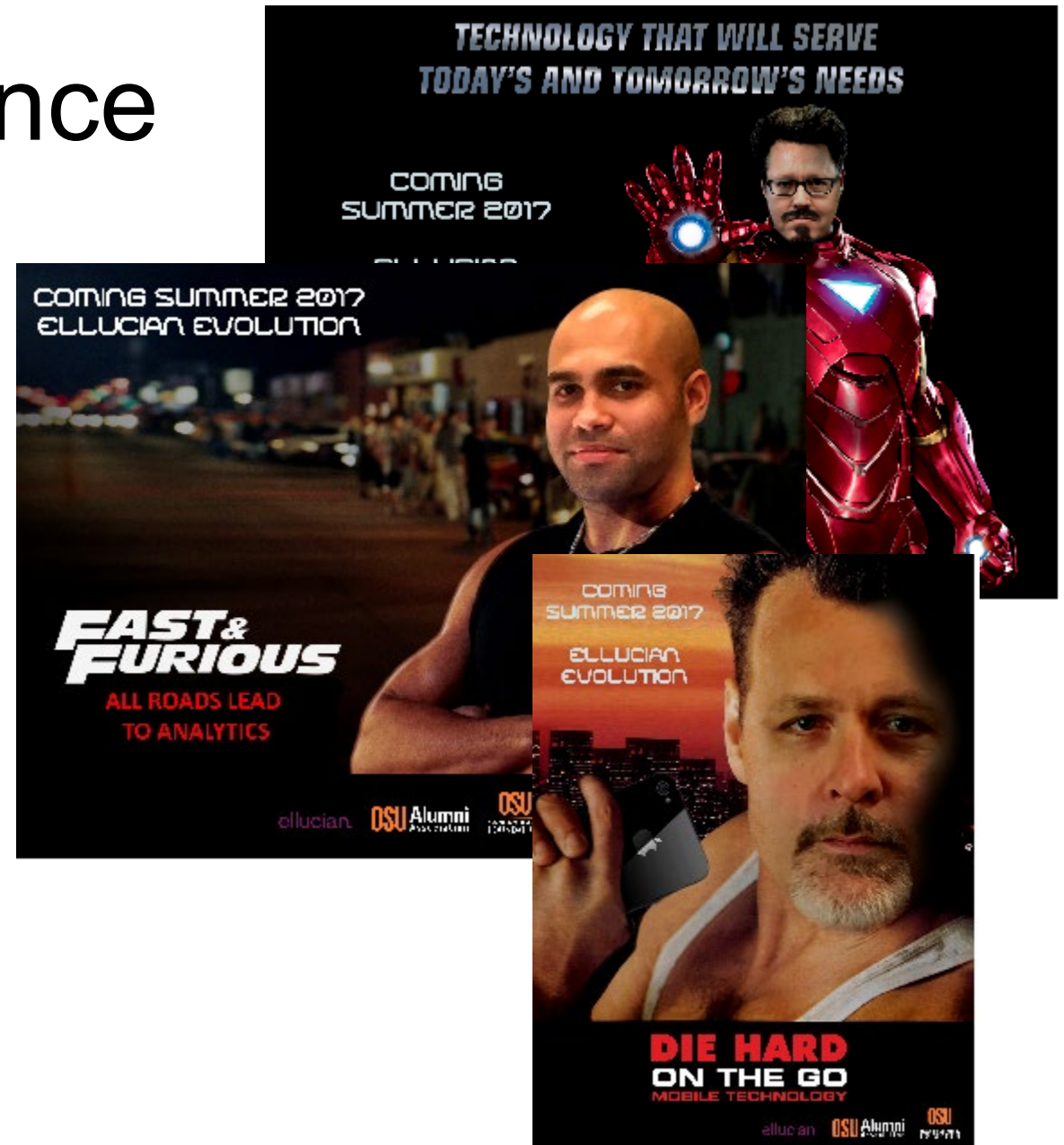
Community

- Over 18 various units
- Unit leads and subject matter experts
- Over 1/2 staff involved in Beta phase
- Highly disciplined approach
- 70+ workshops conducted



Personalized Experience

- Cohort driven
- Made it fun!
 - Movie theme
 - Popcorn Friday's
 - BETA Team Five

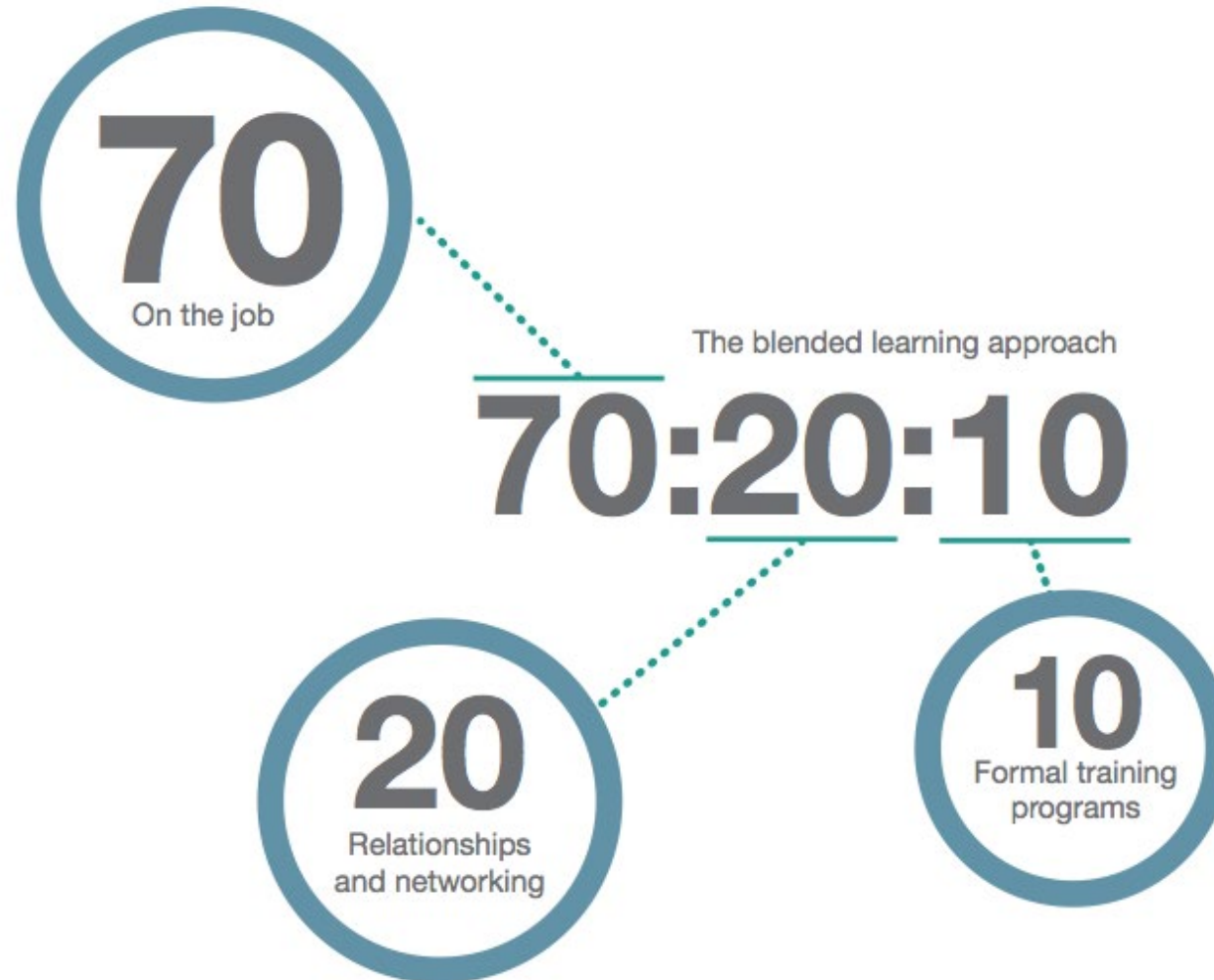


Adoption Program

- Developed 12 courses
- Hosted 70 classes prior to launch
- Employed adult education practices
 - Cohort driven with small class sizes
 - Hands-on, Real world, solution based
 - Leveraged video trainings & GURU®
 - Genius Bar
- System Use Analytics
- Program will continue and adapt



Training – Blended Learning Approach



Courses by Role

Annual Giving / Stewardship	Basic Navigation for web client Advanced Find Communication Plans / Marketing List / Appeals Contribution view / Summary Gift Clubs
Board Relations	Basic Navigation for web client Biographical Inquiry Advanced Find
Director of Development / Athletics	Basic Navigation for web client Basic Navigation for mobile client
Donor Relations	Basic Navigation for web client Biographical Inquiry Gift Clubs inquiry and maintenance
Events	Basic Navigation for web client Biographical Inquiry Advanced Find Communication Plans / Marketing List / Appeals
Executive Leadership	Basic Navigation for web client

The Future State

- Predictive and Prescriptive Analytics
- Marketing choice and automation
- Self service efficiency



Key Takeaways

- Active and visible executive sponsorship
- Set Expectations and Communicate often
- Engage Staff early on and get their feedback on decisions
- Be transparent about the project with all staff
- Be clear about accountability and deliverables
- Bring an element of fun to the project.

Questions