

CLIENT:

National non-profit organisation (NPO) - CHOC

BRIEF:

Integrated MIT system overhaul

PROBLEM-STATEMENT:

CHOC, a large national NPO (the client) initially engaged the service provider to assist with sourcing and implementing an effective Customer Relationship Management (CRM system). They had a partially functioning customer relationship management (CRM) platform with a supplier, but were dissatisfied with the:

- a) Development of the platform
- b) Lack of functionality of the platform
- c) Customer support offered by the supplier
- d) Ongoing relationship with the supplier

The service provider's initial mandate was to:

1. Provide an evaluation and analysis of prospective suppliers and their respective platforms
2. Report and give feedback of findings and assessments to the client.

Soon after the process was initiated, it became apparent that the ineffective CRM platform was just one of many IT challenges the organisation was trying to deal with, as they were using multiple suppliers for their various ICT needs, resulting in a disjointed, inefficient structure with varying levels of customer support. As well as a lack of oversight and accountability from the suppliers for the various services.

Although providing a solution to this one element would solve their immediate concern of effectively managing their donor base, they came to realise that an entire IT overhaul would streamline their processes, improve their efficiency, and produce substantial savings on some of their core operational costs.

SCOPE OF THE PROJECT:

The goals and aims evolved with the project. The initial task of implementing an improved CRM platform expanded to include the following:

1. CRM system
2. Core management of managed information technology (MIT) services
3. System go-live linked to new fiscal year
4. Identifying a single IT supplier (**referred to as new supplier (NS) throughout this case study**)
5. Mail hosting system
6. Statistics recording system
7. Outstanding IT elements
8. Migration to VOIP
9. Platform stability

PROCESS

1. CRM system

There was a clearly identified need for a fully functional Customer Relationship Management (CRM) system that could be built on further as needed. A critical factor was that the new system was ready to go live at the beginning of the client's new financial year.

Once the client had selected a supplier and development path, the process then offered project management of platform development with the new supplier which covered:

- a) Scope creep mitigation (cost and timeline)
- b) Development-time management
- c) Developer interaction and engagement
 - Reducing the time-value cost of the client for the engagement
 - Utilising our knowledge of the client's inner complexities and objectives to ensure outcomes matched needs.
 - Utilising our asset's with systems knowledge to ensure the developmental aspects mirrored the customisation needed in the back end.
- d) Pre-live testing of the platform
- e) Assistance with legacy data transition to new platform
- f) Go-live

The process from beginning to end covered the following aspects:

- Establishing a positive relationship between the CRM development supplier and the client (whether it was the same or a different CRM platform as a final outcome).
- A CRM platform developed and tested to meet the client's needs in terms of being fully functional as opposed to the legacy platforms limitations.
- Project timeline for go-live with a hard-line parameter for completion before the end of the client's financial year. It went live from day one of the new fiscal year.
- Assistance with legacy system data exporting, cleaning and importing to the new system.
- Further duplication dump-data assessment and cleaning assistance in order to retain any value in badly exported data.

2. Core management of information technology (MIT) services

The outgoing supplier of the CRM platform had also been the supplier of core MIT services for the organisation. The goal was to ensure coverage of all those elements by a new supplier, in place and ready to go-live at the start of the new financial year.

The core MIT service areas that needed to transition to a new supplier (NS) were:

- a) Remote support for all users.
 - Usage needs based on historical usage of support.
 - Remote support software was installed and confirmed as functioning on every user's machine
 - Step-by-step guidelines on accessing remote support was circulated to all the users.

- b) Managed data backups for the server.
 - The supplier software was installed on the servers.
 - Server data backups initiated and confirmed running live with new supplier.
- c) Monitoring, maintenance and upkeep of servers.

In order for the take over of server upkeep, monitoring and maintenance, there were certain requirements from the supplier. An administrative account was created on each server and the relevant software was installed on the machine. This was done by the consultants to avoid any potential cost to client for the callout and technician, and also to save them time and effort.

After set up:

 - Managed all trouble shooting such as password resets, software conflicts etc.
 - System was verified with the service provider and access was functioning as per supplier requirements
 - New service provider enabled as administrators.

3. System go-live

The successful deployment of the new CRM system and the core MIT services onboarding by the new supplier had to be ready by agreed upon date.

4. Single IT supplier

The client's various IT needs were setup ad-hoc at each site, as needs arose. This meant multiple suppliers were providing like services in different regions. This created a number of problems for the client, including:

- Inconsistent access to IT elements across the organisation
- Suppliers passing on accountability for non-functional service delivery to others
- Cross-purpose setups of various IT elements, causing system conflicts, etc.

The goal of identifying a single IT service provider was added as it became apparent that this approach would provide clearer accountability, support, oversight and stability for the client. The preferred supplier that was identified already offered some IT services to the client, so a new contract broadening their scope was negotiated with them, offering favourable rates and standardised benefits for all the regions.

The areas that were realigned to achieve this were:

- Connectivity and Infrastructure per site
- Migrations and cancellations were needed
- Deployment of VOX VOIP on the network
- Provision of like-for-like services and hardware per site
- Hardware delivery and setup per site
- VOIP service deployment at each site, including migration and porting of telephone numbers
- Troubleshooting

5. Mail hosting

Although with the preferred single IT supplier, the mail hosting solution in place was identified as out-of-date and sub-par to current standards, and managed by a third-party entity. To help the client migrate to a contemporary standard platform we had to resolve some structural challenges with the supplier before instituting the following processes:

- Identified which mail hosting options are most suited for NPOs.
- Selected Office 365 Live which offers free licensing for non-profits.
- Quantified, audited and compiled list of users
- Confirmed user licenses
- Set up mail structure for 365 Live
- Arranged for the migration of the mailboxes and mail data at no cost to the client.
- Go-live and transition
- Post go-live troubleshooting of mail groups.

6. Statistics recording system

A clearly identified need for a system that would facilitate the organisation's ability to assess, quantify and report on the statistics of their programmes. The two options were to create a new system, or as a further but separate development of the new CRM platform. It was determined that the most expedient and cost-effective option was to develop the CRM platform. The benefits of this were that:

- The quality of the development service offered by the new provider had been established through the CRM platform
- They were familiar with the client's data and operational elements
- Data sets could be used as foundational elements
- It would allow for easier integration of systems.

Once the parameters were defined (i.e. a list of all the data that needed to be collected), the system was developed, making provision for:

- Future developmental growth
- Potential automation in the future
- Scalability of current programmes offered by the organisation as well as any new programmes that would be introduced.

7. Outstanding IT elements

Outside of the scope of Managed IT Services, there were two IT element aspects that the previous supplier had facilitated that needed to be covered:

- a) Anti-virus licensing – also previously done through the outgoing CRM supplier, the anti-virus platform themselves offered more competitive licensing for the client directly so this route was selected and facilitated.
- b) Individual user document backups – again, this was also previously done through the outgoing supplier but included in the Office 365 license is OneDrive storage for each user, available at no extra cost. The OneDrive element for user document backups was initiated, and the process for automating was created and provided to the client to circulate to users.

8. Migration to VOIP

To support the goal of using a single supplier the organisation requested assistance to migrate its telecommunication system to VOIP, allowing them to benefit from the lower rates for calls as well as the more cost-effective hardware.

9. Platform stability

For the migration to VOIP it was necessary to identify what changes needed to be implemented to achieve a stable platform that could be relied upon. This was done by:

- Resolving all the outstanding troubleshooting issues
- Achieving an improved level of platform stability in the short-term via LTE.
- Achieving long-term platform stability via Fibre or Line-of-Sight (LOS) equivalent. This was the end-goal solution for the stability of the VOIP, as well as an improvement to the overall function of connectivity and any other IT elements that depended on connectivity for functionality.

CONCLUSION

At the end of this process, the client was extremely satisfied with their new systems, and have reported that the new MIT system is effective, integrated, standardised throughout the organisation, and affordable. It has saved them time and money with significant commercial benefits realised in several areas, and has improved their record keeping, both for their donors and their beneficiaries, which has streamlined reporting and accountability.