

Blackbaud CRM™ DEVELOPERS' CONFERENCE

KEEGAN WADE

Solutions Architect,
Blackbaud



Importing Data into CRM: Use Cases and Analysis

KEEGAN WADE

Solutions Architect
Blackbaud



Keegan Wade

linkedin.com/in/keeganwade

keegan.wade@blackbaud.com

TITLE

Solutions Architect

AT BLACKBAUD

Since 2006

HOMETOWN

London, Ontario

ABOUT ME

I am a long-time CRM customization developer who has more recently come into the data warehouse customization fold.



This presentation...

- Goal: Explore several data importing scenarios to help better understand the tools and techniques available when importing data into CRM
- Won't get into any actual coding, more about analyzing the use cases

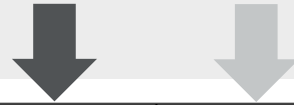
CRM Data Import Strategies

	Manual entry	Classic batch import	Bulk import	Custom file import process	SSIS	3rd party application to CRM API (i.e. push)	Custom CRM process to 3rd party API (i.e. pull)
Large data volume at once?	No	Qualified yes, or with effort it can at least be partially accomplished	Yes	Yes	Yes	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished
Real-time?	No	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	Yes	Qualified yes, or with effort it can at least be partially accomplished
File-based processing?	No	Yes	Yes	Yes	Yes	No	No
Multiple-record types per row in file?	No	Qualified yes, or with effort it can at least be partially accomplished	Yes	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	No	No
Exception handling and display?	Yes	Yes	Yes	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished
Custom data processing and exception logic?	Yes	Yes	Qualified yes, or with effort it can at least be partially accomplished	Yes	Yes	Yes	Yes
Track data by batch or batch workflow?	Yes	Yes	No	No	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished
Works in Blackbaud-hosted environment?	Yes	Yes	Yes	Yes	No	Yes	Yes
Works in self-hosted environment?	Yes	Yes	No	Yes	Yes	Yes	Yes
Legend							
	Yes						
	Qualified yes, or with effort it can at least be partially accomplished						
	No						

Use Case 1

- We have a third party system that logs around 20 pledges per month
- The business wants to periodically enter these pledges into CRM
- There is a crude file export available, but it is patchy and not well formatted

Use Case 1



	Manual entry	Classic batch import	Bulk import	Custom file import process	SSIS	3rd party application to CRM API (i.e. push)	Custom CRM process to 3rd party API (i.e. pull)
Large data volume at once?	No	Qualified yes	Yes	Yes	Yes	Qualified yes	Qualified yes
Real-time?	No	Qualified yes	Qualified yes	Qualified yes	Qualified yes	Yes	Qualified yes
File-based processing?	No	Yes	Yes	Yes	Yes	No	No
Multiple-record types per row in file?	No	Qualified yes	Yes	Qualified yes	Qualified yes	No	No
Exception handling and display?	Yes	Yes	Yes	Qualified yes	Qualified yes	Qualified yes	Qualified yes
Custom data processing and exception logic?	Yes	Yes	Qualified yes	Yes	Yes	Yes	Yes
Track data by batch or batch workflow?	Yes	Yes	No	No	Qualified yes	Qualified yes	Qualified yes
Works in Blackbaud-hosted environment?	Yes	Yes	Yes	Yes	No	Yes	Yes
Works in self-hosted environment?	Yes	Yes	No	Yes	Yes	Yes	Yes

Legend

Yes	Yes
Qualified yes	Qualified yes, or with effort it can at least be partially accomplished
No	No
Indicates applicable to use case	

Use Case 2

- The number of pledges increases to 100 per month
- A developer improves the quality of the export from the third party system
- Management wants staff to review these pledges before they are saved into CRM

Use Case 2



	Manual entry	Classic batch import	Bulk import	Custom file import process	SSIS	3rd party application to CRM API (i.e. push)	Custom CRM process to 3rd party API (i.e. pull)
Large data volume at once?	No	Qualified yes	Yes	Yes	Yes	Qualified yes	Qualified yes
Real-time?	No	Qualified yes	Qualified yes	Qualified yes	Qualified yes	Yes	Qualified yes
File-based processing?	No	Yes	Yes	Yes	Yes	No	No
Multiple-record types per row in file?	No	Qualified yes	Yes	Qualified yes	Qualified yes	No	No
Exception handling and display?	Yes	Yes	Yes	Qualified yes	Qualified yes	Qualified yes	Qualified yes
Custom data processing and exception logic?	Yes	Yes	Qualified yes	Yes	Yes	Yes	Yes
Track data by batch or batch workflow?	Yes	Yes	No	No	Qualified yes	Qualified yes	Qualified yes
Works in Blackbaud-hosted environment?	Yes	Yes	Yes	Yes	No	Yes	Yes
Works in self-hosted environment?	Yes	Yes	No	Yes	Yes	Yes	Yes

Legend	
Yes	Yes
Qualified yes	Qualified yes, or with effort it can at least be partially accomplished
No	No
Indicates applicable to use case	

Use Case 3

- Due to the absence of exceptions and the quality of the export, management no longer feels it is necessary to review pledges before saving them to CRM.
- The export is supplemented with fields that describe the interaction that led to the generation of the pledge

Use Case 3



	Manual entry	Classic batch import	Bulk import	Custom file import process	SSIS	3rd party application to CRM API (i.e. push)	Custom CRM process to 3rd party API (i.e. pull)
Large data volume at once?	No	Qualified yes	Yes	Yes	Yes	Qualified yes	Qualified yes
Real-time?	No	Qualified yes	Qualified yes	Qualified yes	Qualified yes	Yes	Qualified yes
File-based processing?	No	Yes	Yes	Yes	Yes	No	No
Multiple-record types per row in file?	No	Qualified yes	Yes	Qualified yes	Qualified yes	No	No
Exception handling and display?	Yes	Yes	Yes	Qualified yes	Qualified yes	Qualified yes	Qualified yes
Custom data processing and exception logic?	Yes	Yes	Qualified yes	Yes	Yes	Yes	Yes
Track data by batch or batch workflow?	Yes	Yes	No	No	Qualified yes	Qualified yes	Qualified yes
Works in Blackbaud-hosted environment?	Yes	Yes	Yes	Yes	No	Yes	Yes
Works in self-hosted environment?	Yes	Yes	No	Yes	Yes	Yes	Yes
Legend							
Yes							
Qualified yes, or with effort it can at least be partially accomplished							
No							
Indicates applicable to use case							

Use Case 4

- Export now sends all interactions from the third party system, not just those related to the pledge
- Some rows only contain interactions
- Because of all these new interactions, the file size increases to ~2000 rows
- Lastly, there is also a need to automatically generate prospect plans based on some of the interaction characteristics

Use Case 4

		Manual entry	Classic batch import	Bulk import	Custom file import process	SSIS	3rd party application to CRM API (i.e. push)	Custom CRM process to 3rd party API (i.e. pull)
	Large data volume at once?							
	Real-time?							
	File-based processing?							
	Multiple-record types per row in file?							
	Exception handling and display?							
	Custom data processing and exception logic?							
	Track data by batch or batch workflow?							
	Works in Blackbaud-hosted environment?							
	Works in self-hosted environment?							
	Legend							
		Yes						
		Qualified yes, or with effort it can at least be partially accomplished						
		No						
		Indicates applicable to use case						

Use Case 5

- Management decides it is important for new interactions to register as soon as possible into CRM from the third party system
- The third party system is not capable of being customized, but it does have an API endpoint that returns interactions

Use Case 5

	Manual entry	Classic batch import	Bulk import	Custom file import process	SSIS	3rd party application to CRM API (i.e. push)	Custom CRM process to 3rd party API (i.e. pull)
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Real-time?	No	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	Yes	Qualified yes, or with effort it can at least be partially accomplished
File-based processing?	No	Yes	Yes	Yes	Yes	No	No
Multiple-record types per row in file?	No	Qualified yes, or with effort it can at least be partially accomplished	Yes	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	No	No
Exception handling and display?	Yes	Yes	Yes	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished	Qualified yes, or with effort it can at least be partially accomplished
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Works in Blackbaud-hosted environment?	Yes	Yes	Yes	Yes	No	Yes	Yes
Works in self-hosted environment?	Yes	Yes	No	Yes	Yes	Yes	Yes

Legend

- Yes
- Qualified yes, or with effort it can at least be partially accomplished
- No
- Indicates applicable to use case

Use Case 6

- The third party application receives an upgrade that allows it to execute plugins/customizations to make API calls to other cloud-based applications

Use Case 6



	Manual entry	Classic batch import	Bulk import	Custom file import process	SSIS	3rd party application to CRM API (i.e. push)	Custom CRM process to 3rd party API (i.e. pull)
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Real-time?							
File-based processing?							
Multiple-record types per row in file?							
Exception handling and display?							
Custom data processing and exception logic?							
Track data by batch or batch workflow?							
Works in Blackbaud-hosted environment?							
Works in self-hosted environment?							

Legend	
	Yes
	Qualified yes, or with effort it can at least be partially accomplished
	No
	Indicates applicable to use case

Other factors to consider

- How much effort will it take to implement a given method/tool?
- If custom coding is required, is the developer or organization stronger at programming certain methods/tools?
- Is it possible to combine methods/tools for the situation?

Questions, comments?

Your own experiences or recommendations?