SAGE Data Infrastructure Project

High-level objectives:

- **Comprehensive & reliable data** across the organization
- Increased ability to build analytics & **insights around business cases**
- **Connected view** of all constituents, with detailed demographic data
- **Consistent adoption** of new solutions across employee base

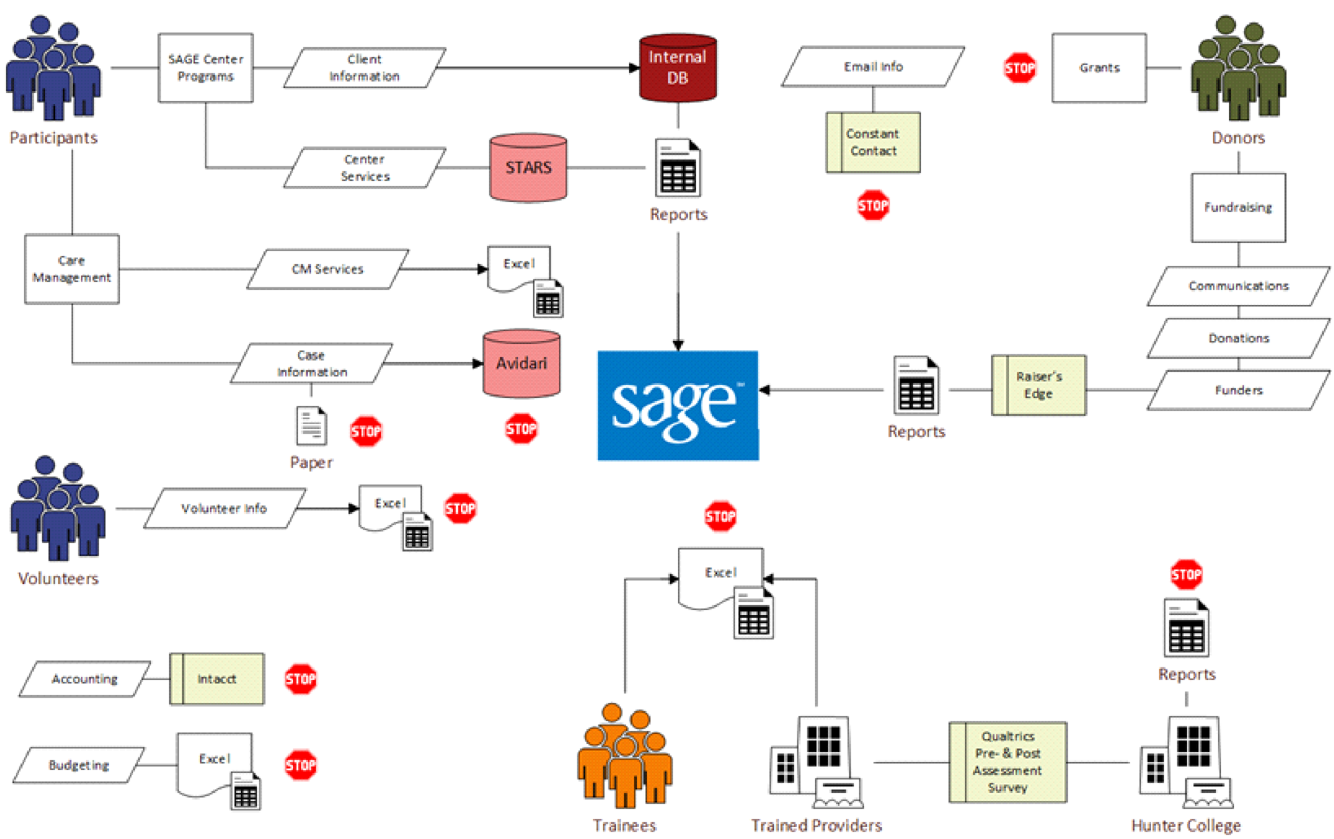
Context:

Today, SAGE struggles to capture & utilize data in a consistent manner that is easy to analyze, limiting its ability to make data-driven decisions and build business cases.

- Data lives on multiple systems & formats, difficult to use efficiently and effectively
- Unable to assess & measure program impact and build business case
- Requirements across business lines not universally known
- Wide-range in technology skills & comfort across employees

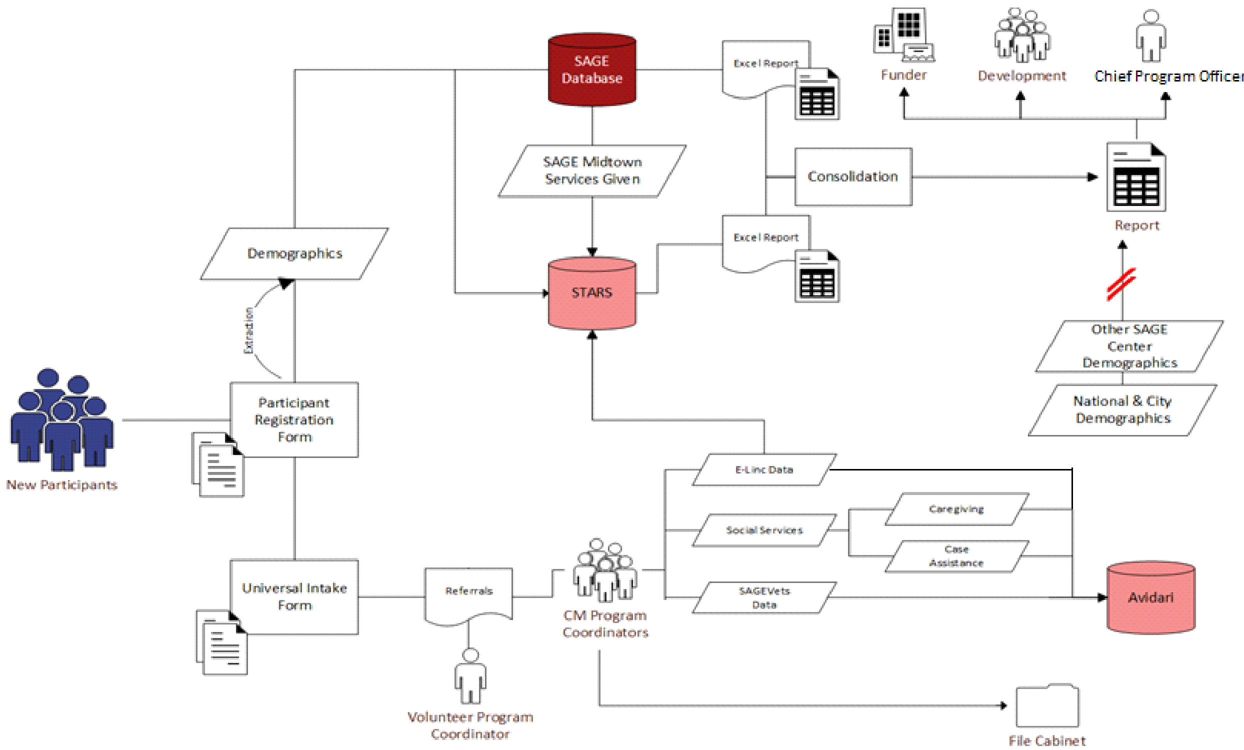
Current State:

SAGE's lack of connectivity extends across the organization and prevents a full 360-degree view of its constituents

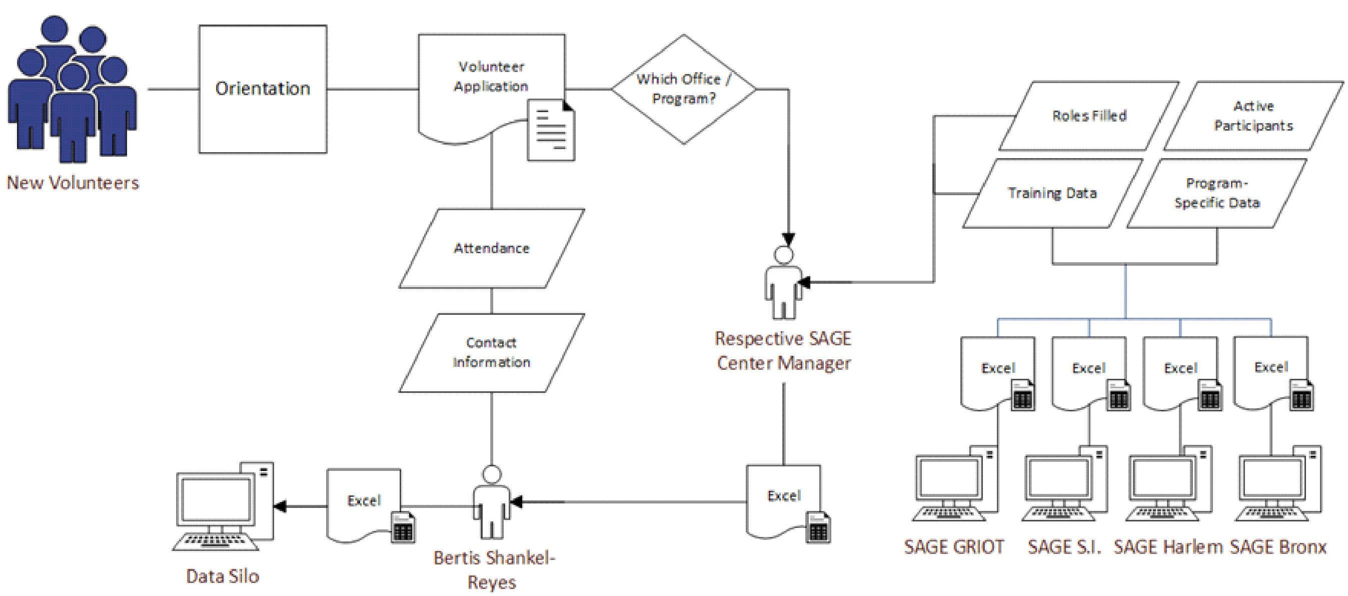


Per Department Break-down:

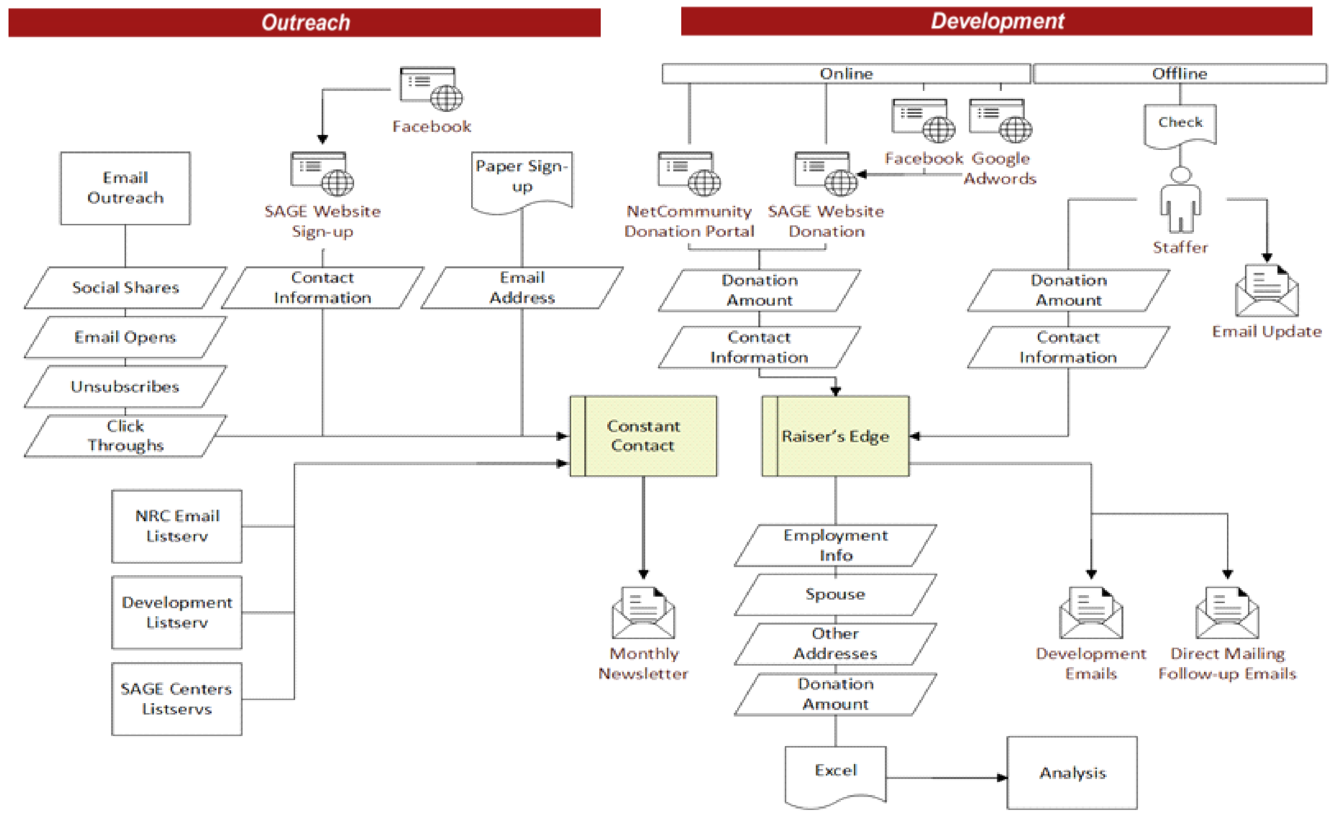
Direct Services - Participant data is tracked in redundant processes & databases, while more detailed information resides in hard copy forms



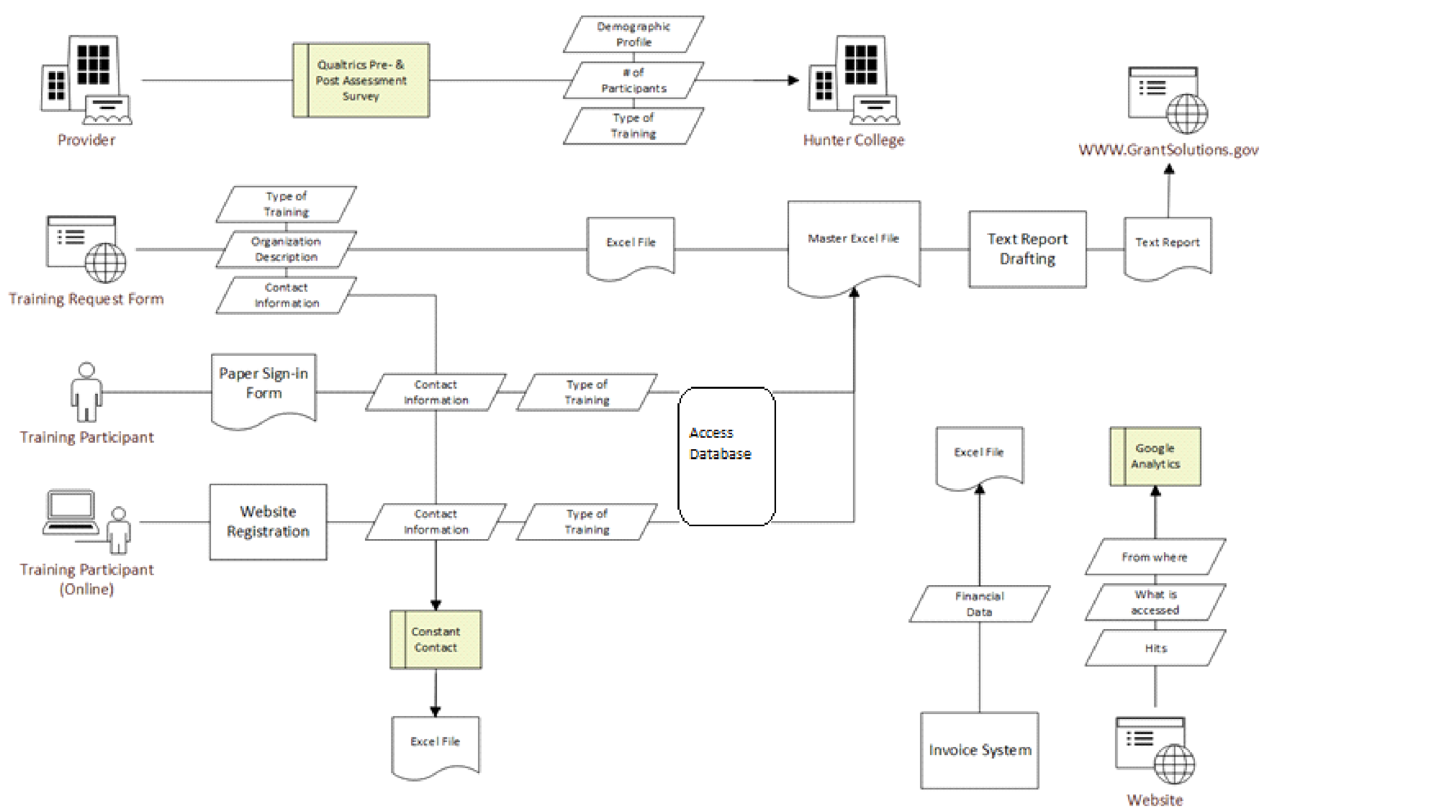
Volunteers - Volunteer data is manually compiled and stored into a data silo, rendering useful information inaccessible



Engagement & Devo - Marketing and communications at SAGE occur across multiple segments of the organization



Training - SAGE's Training data is stored within Excel files and an Access Database that is inaccessible by the broader organization



Why Salesforce?

Thursday, July 27, 2017 11:16 PM

According to an assessment from a consulting team at **AT Kearney**, SAGE needed a fit-for-purpose solution to improve data capture & management processes, facilitate the building of reports & business cases and aligns to the organization's size and ability.

Criteria for potential solutions:

1. Products that offer comprehensive CRM (i.e. not just fundraising)
2. Multifunctional application suite to include all of the following modules or integration capabilities:

Contact Management	Volunteer Management	Fundraising
Event Management	Case Management	Learning Management
Email	Accounting	

3. Offers a solution suitable for mid-size organization
4. Provides solution targeted to non-profit organizations

These are best met by purchasing an integrated solution instead of custom building for reasons outlined below:

	Integrated commercial solution	Custom build
Implementation	• Designed as **integrated, customizable platforms on a single system** • Hosts applications which: • **Increase functionality** of base system • **Reduce time & cost** of implementation • **Builds on best practices** by leveraging experience and functionality needs from numerous organizations	• Designed only for SAGE to **tie multiple systems together** • Must **reinvent the wheel** for basic functionality such as mail merge, emailing, reports, etc. • Lacks robust user community, **limiting ability to identify system issues** • Based on SAGE processes, **not broader best practices**
Ongoing use & maintenance	• **Regular software upgrades** as part of service • **Ubiquitous training resources** available • **Robust support ecosystem** due to large user base, including: • Vendors • FAQ's & User forums • Consultants • Other Users	• **No upgrades** unless self-built/funded • **Training** must be **designed, conducted & maintained** in house • Risk losing training capability with personnel turnover • **Ongoing support is limited** to those who understand and/or built the system

Options considered:

CRM List Evaluation

Deep Dive List | Excluded

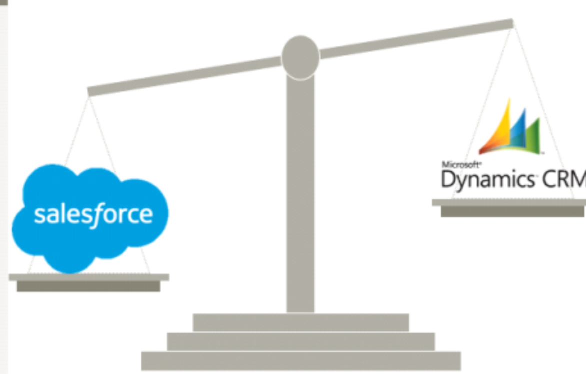
Salesforce	• Salesforce has strong support for business & non-profit models; platform flexibility combined with applications from the AppExchange
Microsoft *(Dynamics CRM)*	• Microsoft Dynamics CRM is a strong suite for mid-sized organizations and has been adapted for many non-profits • Look and feel is similar to other Microsoft products
Sumac CRM	• CRM system built & designed originally for non-profits, with non-profit specific add-ons (e.g. case management, volunteers, etc.) • Unable to integrate an LMS solution
CiviCRM	• Open source CRM built for non-profits with many non-profit specific features but requires Joomla, Drupal, or Wordpress content management system (web site design)
Excluded Initial List	• SAGE CRM • Infor CRM • Aptean • Neon CRM • SAP Cloud for Customer • BPM online CRM • Insightly CRM • Infusionsoft • SugarCRM • NetSuite CRM • Maximizer CRM • Zoho CRM • ACT!

Salesforce is a better CRM platform for SAGE due to its larger community of applications, consultants & support for nonprofits

Salesforce vs Dynamics CRM

Salesforce Benefits

- Salesforce NPSP is pre-built with customizations needed to modify platform for non-profit needs
- Salesforce AppExchange features hundreds of applications to expand base system functionality
- Easy-to-search database of consultants & developers who specialize in working with non-profits

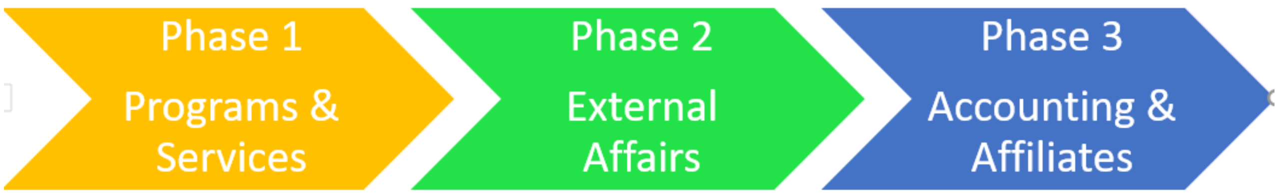


Dynamics Limitations

- Limited pre-built configurations available for non-profits; necessary modifications require extensive initial investment to build minimal functionality
- Limited applications available to add functionality & fewer non-profit software programs are designed to interface
- Difficult to find consultants focused on working with non-profit organizations

Implementation

Implementation of this project will take an estimated 12-36 months across three phases. Phase one will focus on services, which includes Care Management, SAGE Centers and National Team, while phase two will focus on External Affairs which includes Development, Advocacy and Engagement(includes National Volunteers, Marketing & Communications), and phase three will focus on Accounting and two SAGE Affiliates.



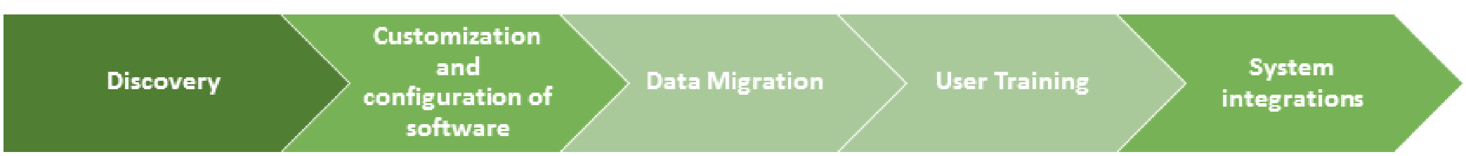
- Phase one will begin with services because new functionality will be added to SAGE up-front, reducing the time generating reports and increasing efficiency. There will be an introduction of Salesforce to a larger group of employees with less software experience allowing for greater absorption of the new structure.

- Phase two is structured the way it is because timing of system go-live/migration can be matched to Development calendar needs.

- Phase three will begin with two SAGE affiliates because SAGE will be able to use the process of phases one and two to learn the best practices to introduce Salesforce to the affiliates.

Process:

Every department will go through the following process:



Discovery:

Initial discovery meeting to understand the business processes of the department as well as review relevant documentation. Identification of external add-ons and integrations will be made during this phase and a data schema will be mapped out.

Customization:

Configurations to Salesforce made based on data schema and fields provided in documentation from discovery meetings

Data Migration:

The data migration process includes a data cleanup process that looks at the information currently stored in legacy databases and spreadsheets to normalize data (ex: making sure that there aren't any duplicate records, that fields aren't blank and that they are all in the same format). Metadata is exported in a .csv file and then mapped to be imported into Salesforce using a data loader tool.

User Training:

There will be three layers to the user training process. The first layer is a walkthrough of Salesforce to show the initial customized layout and familiarize staff with terminology. The second layer is a walkthrough of the overall data entry process using a case study with an additional visual tutorial for staff to be able to walk through at their own pace. The third layer is a walkthrough of how to customize the end-user experience.

System Integration:

Technical mapping of data and integration to achieve interoperability with existing systems or new systems. (ex: STARS, Donation Management, LMS, etc.)

Challenges and Strategies

One of the most fundamental challenges in the process of creating a centralized data infrastructure is setting realistic expectations. The requirements analysis stage, or discovery phase, offers one of the best opportunities in the process to recognize and understand the full scope of complexity of the task at hand. Some of the project impediments and potential solutions are highlighted below:

Challenge – *Heterogeneous Data*

The process of creating a centralized data infrastructure requires synchronizing huge quantities of data from our legacy databases that vary in data format and migrating them into Salesforce or creating a connection between the legacy database and Salesforce through integration.

Strategy - Engage in a detailed analysis of the characteristics and uses of data and identify the format that various applications can use.

Challenge – *Bad Data*

Legacy data must be cleaned up prior to the migration or integration process. SAGE has several end users entering data into the legacy databases, and because of this data has sometimes been entered in the wrong place, misspelled, incomplete or missing. This is an issue to the overall data quality.

Strategy – Inform departments ahead of time that must go through a data clean-up process as well as work collaboratively with users to determine quality controls that will be in place in both the development phase and ongoing use of the system.

Challenge – *Unanticipated Costs*

Data migration and integration costs are fueled largely by items that are difficult for the inexperienced to quantify, and thus predict. These might include:

- Labor costs for initial planning, evaluation, programming and additional data acquisition
- Software and hardware purchases
- Unanticipated technology changes/advances
- Both labor and the direct costs of data storage and maintenance

Limited resources may cause project timelines to be extended, without commensurate funding. Unanticipated issues, or new issues, may call for expensive consulting help.

Strategy – The approach to estimating project costs must be both far-sighted and realistic. This requires an investment in experienced consultants and learning from other organizations as much as possible. Cloud for Good has been a great resource to see how other non-profits have accomplished certain functions using Salesforce.

Challenge – *Inconsistent cooperation from staff*

The different departments at SAGE have developed their own databases that operate independently and have met a particular need. It's only natural that there be some skepticism that Salesforce would not support their needs as effectively.

Strategy – The key element that a large scale conversion project like this demands is that executive management be fully on board. This process requires informing and involving a diverse group of staff during the various steps.

Collecting and addressing each user's concerns is an effective way to gain buy-in, trust and cooperation. It also allows for incremental education rather and an after-the-act training and helps calibrate appropriate expectations along the way. Skilled communicators are needed as so much of the project's success is dependent upon understanding and conveying both human and technical issues.

Challenge – *Staff turn over*

There has been turn over with the SAGE Project Sponsor role and the Arkus Inc. Project Manager role. This has delayed the process because multiple rediscovery phases were needed to bring the new person up to speed with the project.

This position of Salesforce Administrator started off as a part time position and was shared with the Administrative Assistant role for the Care Management department. This also delayed the process because the Salesforce Administrator role needed full time commitment, but wasn't staffed full time. It later shifted to full time and included a transitionary period so that the Salesforce Administrator could train the new Administrative Assistant to the Care Management department. However, there have been four Administrative Assistants that have needed training in the past year. Therefore, the commitment to the project has not been completely staffed full time.

Strategy – Detailed documentation of the project and its milestones for reference and onboarding any new key members of the project.

Identifying other staff within the Care Management department who can train a new admin so that the Salesforce Administrator could focus on the project full time.

Challenge – *Perception of Overwhelming Effort*

Multiple major initiatives occur simultaneously and it can become difficult for staff to make time for it all. Something like a shift in the organization's data infrastructure requires monumental initial commitment of resources and staff. The perception of this major upfront overhaul may sometimes feel unachievable or disruptive.

Strategy – Being methodical in the planning process and setting incremental goals can help ensure that each goal is understood, achieved and funded adequately.

Roles and Responsibilities

Roles & expectations during implementation:

<table>
<tr><th></th><th>Role Description</th><th>Expectations During Implementation</th></tr>
<tr><td>Project Sponsor</td><td>
Individual with ability to reach across and within SAGE's different business lines
Familiar with organization's data uses & functional requirements
<u>Current Staff:</u> Greg Macias
<u>Previous Staff:</u> Tracy Welsh, Mark Gasparini</td><td>
Reviews progress & provides guidance on project issues & risks
Approves changes to costs & funding</td></tr>
<tr><td>Integrator from Arkus Inc.</td><td>
Individual who serves as a consultant with the in-depth knowledge of Salesforce capabilities.
<u>Current consultant:</u> Ashley Leifer
<u>Previous consultant:</u> Holly Ryall</td><td>
Provides configurations of Salesforce and third-party add-ons.
Provides training tools and weekly project status updates</td></tr>
<tr><td>System Admin</td><td>
Individuals with capability & capacity to take on system administrator responsibilities
In-depth knowledge of data uses, sources, and processes within the organization
(1 person as primary, with a backup individual also trained & kept in the loop to step-in when needed)
<u>Current Staff:</u> Denise Atherley
<u>Recommendation:</u> Jesse Tucker</td><td>
Leads coordination between SAGE, third-party integrator, and Salesforce
Manages scope, including adherence to the SOW and additions to the SOW
Provides insight & prioritization around requirements
Assists with configurations of Salesforce and third party add-ons.
Trains in-depth on Salesforce and relevant applications, including administrator tasks
Participates in user acceptance testing (UAT)</td></tr>
<tr><td>Business Owner</td><td>
One implementation & adoption "champion" per business line
<u>Current Staff:</u>
<table>
<tr><th>Department</th><th>Data Steward</th><th>Role</th></tr>
<tr><td>Strategy & Impact</td><td>Denise Atherley</td><td>Project Lead</td></tr>
<tr><td>Corporate</td><td>Patrick Aitcheson</td><td>Main Contact</td></tr>
<tr><td>National Initiatives & Engagement</td><td><u>Current Staff:</u> Sherrill Wayland & Tim Johnston <u>Previous Staff:</u> Leon Avelino</td><td>Main Contact</td></tr>
<tr><td>SAGE Centers</td><td>Steve Wilkinson</td><td>Main Contact</td></tr>
<tr><td>Care Management Services</td><td>Tom Weber</td><td>Main Contact</td></tr>
<tr><td></td><td>Katie Douglass</td><td>Back-Up</td></tr>
<tr><td>Development</td><td>Kirsten Bert & Kevin Stec</td><td>Main Contact</td></tr>
<tr><td>Grassroots Advocacy</td><td>Aaron Tax</td><td>Main Contact</td></tr>
</table></td><td>
Provides insight & prioritization around requirements
Trains in-depth on Salesforce and relevant applications
Participates in user acceptance testing (UAT)</td></tr>
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<tr><td>Grassroots Advocacy</td><td>Serena Worthington</td><td>Back-Up</td></tr>
<tr><td>Communications and Marketing</td><td>Anna Wahrman</td><td>Main Contact</td></tr>
<tr><td></td><td>Christina Da Costa</td><td>Back-Up</td></tr>
<tr><td>Affiliates</td><td>Serena Worthington</td><td>Main Contact</td></tr>
<tr><td>Finance</td><td>Lawson Shadburn & Otto Roberts</td><td>Main Contact</td></tr>
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<td>End-Users</td>
<td>• Any individual responsible for data input and manipulation in the Salesforce system</td>
<td>• Trains on use of Salesforce & relevant applications
• Tested on user understanding</td>
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These roles have defined decision rights and responsibilities with respect to data management and approvals.

	Data management tasks	**Project Sponsor**	**System Admin**	**Data steward**	**Executive Team**	**Third-Party**
On-going	Adding new/changing existing data fields	Approver	Responsible	Consulted for opinions	N/A	N/A
	Changing access rights	Approver	Responsible	Consulted for opinions	N/A	N/A
	Managing & fixing data quality issues	Approver	Consulted for opinions	Responsible	N/A	N/A
	Performing refresher or troubleshooting training	Approver	Consulted for opinions	Consulted for opinions	N/A	Responsible
Ad-hoc	Changing reports/visualizations for the ET or Board	Approver	Responsible	N/A	Consulted for opinions	N/A
	Adding new applications/automations	Approver	Consulted for opinions	Consulted for opinions	N/A	Responsible

Future State

This is how we'd like connectivity to look