NORTH PEAK
SOLUTIONS

Framework for a High-functioning CRM

Write Your Impact Statement

The very first critical step is to define why, for your particular org at this particular time, a database is crucial to support the way you aspire to work & what you aspire to achieve. This message is your impact statement.

An effective impact statement meets the following criteria:

- Relevant to your organization's mission
- Tied to your organizational priorities for the near-term (0-24 months)
- Tied to transparent, measurable indicators of success

Who to engage in writing the statement

- Executive leadership
- Heads of departments
- Team/person identified as responsible for CRM

To prepare to write your impact statement, consider the following:

- What are your organization's top priorities (likely found in a strategic plan)?

- What are your top challenges (likely identified within a strategic planning process)?

- How might a high-functioning CRM address those priorities and challenges? What value would it provide your organization?

- How is the success of the CRM measured? How will you know if you're on track to creating the value outlined above?*

*Keep in mind: success, as you define it, should be achievable in the near-term. Consider:

- Do you have the resources for that awesome system right now?

- Do you have buy-in from the right people?

Considering the above, write your CRM impact statement:

____________[organization name]______________ aims to create/maintain a high-functioning CRM in order to __________________[define value CRM brings]____________________, which supports our organizational goals to ___________[organizational priorities CRM can impact]____________.

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Define Leadership Role

This impact statement needs a messenger with influence and authority-- a leader. They need to believe in it wholeheartedly and take ownership for the outcome. We will refer to this person as the Executive Stakeholder. Keep in mind: this person is not necessarily the CEO/ED, and it can be shared across a couple roles.

Characteristics of an Executive Stakeholder:

- Passion for technology & what it can do for your organization (this person probably has strong opinions about the impact statement for your system)
- Social capital they are willing to use to build buy-in from other leaders and drive action
- Decision-making authority
- Availability-- being the leader for the database requires time

Responsibilities of an Executive Stakeholder:

More information on each of these areas in [this post.]

- **Organizational Alignment**: they ensure the CRM is a shared organizational priority and help identify ways the CRM can support other org priorities
- **Change Management**: they lead the organization through any substantial efforts to change or evolve the system
- **Resource Allocation**: they secure budget for CRM-related initiatives and ensure staff have appropriate time to dedicate to the system
- **Decision Making**: they direct the team in how to set milestones that will lead to achieving the CRM's intended impact, as well as how to address risks to meeting these milestones or compromise when necessary
- **User Adoption**: they promote use of the system at all levels of the organization, mainly through leading by example

Name of your Executive Stakeholder:

Considering the above, write the name of your Executive Stakeholder.

What actions can (or do) they take to support each of these key areas related to CRM success?

Area of Responsibility	**Actions taken (note frequency)**
Organizational Alignment	
Change Management	
Resource Allocation	
Decision Making	
User Adoption	

Identify & Define Necessary Resources

A healthy CRM requires investment at all levels of the organization. Now, we'll define what actions and behaviors are required of other staff on a regular basis.

Heads of Departments

Identify each department impacted by the CRM and with them, consider the included questions to determine how they can benefit from and support a strong system.

Department Name	**Department Head**	**How does (or how can) the CRM support their goals for their team?**

Admins

System administrators are responsible for the day-to-day management of the CRM. Consider the following questions to determine whether the admin is well-positioned to support a strong system.

How does the admin ensure the system is healthy, i.e. manage data, conduct troubleshooting, and support user training? Does the admin have appropriate tools and time to do this work?

How does the admin assess, plan, and implement system changes and enhancements? Does the admin have appropriate tools and time to do this work?

Power Users

For all departments listed above, identify Power Users, or individuals who are advocates for and knowledgeable about CRM use in their specific business areas. With them, consider the included questions to determine how they can benefit from and support a strong system.

Department Name	Power User(s)

For all Power Users:

1. **In what ways do (or can) they advocate for CRM use within their team?**

2. **In what ways do (or can) they help train users and answer their questions about the system?**

3. **What consistent channels do they have to share feedback or requests with the Admin?**

All Staff

Consider the following questions to determine whether users are well-positioned to benefit from and support a strong CRM.

Is CRM use written into all job descriptions for staff who are expected to use the system?

Are staff given appropriate time to use the CRM to the level they are expected to do so? If not, for which types of roles or in which teams do staff struggle to find time for CRM use?

What supports do staff have for the following:	
CRM training during onboarding:	

Ongoing training:	
One-off questions:	
Enhancements or requests for system changes:	

Accountability and Reporting

Here we'll define measures indicating the team is successfully using your Salesforce CRM. We're not suggesting you aim for perfection and this is necessarily going to be a mix of qualitative and quantitative measurements that are specific to your team both in terms of the indicators and their baselines. Here are some examples to get you started:

Indicator to be tracked	**Related organizational priority**	**How we'll track it**
Users are logging in frequently	Strong user adoption	Database report
Number of records created by users each month	Strong user adoption	Database report
Trainings delivered to all new staff	Strong user adoption	Self-reported by admin quarterly
Feedback on system captured from each team every month	Strong user adoption	Database feedback tracker
YTD membership renewal rate	Increased renewal rate	Database report (pulled quarterly)
Increase in member engagement	Increased renewal rate	Database reports (pulled quarterly)
Qtrly metric reports are pulled from CRM as opposed to developed by hand outside Salesforce	Actionable Insights	Regular review of internal process
CRM reports are referenced in real-time during leadership discussions	Actionable Insights	Witness it

About North Peak Solutions

North Peak is a Salesforce consultancy focused exclusively on nonprofits. We build great CRMs and empower organizations to use them expertly.

We work with organizations that believe a high-functioning CRM is mission-critical, and invest in a vision, in leadership, and in resources for their system. We have particular expertise in working with mid-sized nonprofits of all types, affiliated organizations, and grantmakers.

If you are interested in talking through your CRM strategy or want to learn more about how we work with organizations to achieve their goals, reach out to us.