

EFFECTIVE CRM IMPLEMENTATION

WORKSHOP DELIVERED OVER THREE 2 ½ HOUR ZOOM SESSIONS



It is vital that For Purpose organisations effectively engage, build and sustain mutually rewarding relationships with their donors, supporters and stakeholders.

However, while CRM is critical for success, it can be a challenge to implement and embed new practices.

This workshop will cover the fundamentals of successful CRM projects for our sector and provide practical insights and tools to plan and implement the CRM that's fit for your purpose.

It will also provide the opportunity to gain insights from a panel of experienced sector leaders, and discuss implementation issues with your peers.

SESSION 1

Monday, 15 Nov (9.00-11.30am AEST)

SESSION 2

Wednesday, 17 Nov (9.00-11.30am AEST)

SESSION 3

Thursday, 25 Nov (9.00-11.30am AEST)

WORKSHOP TOPICS COVERED

CRM in our Sector

- Why is CRM important: Benefits
- Impact of not getting it right

What CRM means to you

- You and your stakeholders
- Developing your CRM vision

Key Success Factors

- Typical challenges & pitfalls

Creating a CRM Roadmap

- Implementation stages & activities
- Planning beyond the go-live date

CRM Implementation

- Key issues - project team, data cleansing & migration, user training

Embedding Behaviour Change

- How to ensure people use CRM

WHO SHOULD ATTEND

Executives, managers, and specialists in the following functions: supporter engagement, fundraising, marketing, communications, and CRM project management.

CRM FAMILIARITY

Beginner or Intermediate.

INTERACTIVE DISCUSSION WITH SECTOR LEADERS

(Workshop Session 3)

Ability Options:

Helen Conway (Project Manager - CRM)

The Wilderness Society:

David Bourne (Systems & Technology Manager)

YOUR FACILITATOR - ANGELINE VEENEMAN



Angeline is a consultant, facilitator, project manager, IT specialist and business analyst, and most of all, someone who likes to keep things clear and simple.

After honing her management, technology and business skills in the corporate sector, Angeline started Maysix Consulting in 2012 to focus on the non-profit sector and help non-profit organisations harness technology for good.

Angeline is privileged to work with a wide range of organisations including The Wilderness Society, Amnesty International, Black Dog Institute, the Australian Academy of Science, and Community Legal Centres. Find out more at maysix.com.au.

COST

Members (GST incl): \$330 AUD

Non-Members (GST incl): \$440 AUD

REGISTER NOW

"The experience can be summarised in one word 'excellent'. The workshops provided a practical and useful framework on how to approach a project that can seem overwhelming. Angeline has a genuine appreciation of the nuances of the not-for-profit sector and our resource constraints and actual experience of working on these projects."

"The workshops and Angeline's recommended approach enabled us to articulate our objectives and the benefits and commence engaging all relevant stakeholders on our CRM journey" - Kylee Bates, CEO Ardoch

OUR APPROACH - LEARNING INTO ACTION

The objective is for participants to strengthen their outcomes measurement skills and apply these to their organisation.

Preparation

- Pre-reading provides common baseline knowledge
- Complete on-line survey

Zoom Workshops

- Reinforces key models
- Group discussion & Peer Learning
- Action Planning

Implementation

- Apply in organisation
- Continue the Discussion (on-line forum & access Resource Hub)
- Implementation help (optional)

The Centre for Social Purpose is a membership community to assist For Purpose organisations to achieve their purpose and commercial objectives through improving operational excellence. [CLICK HERE](#) to learn more about the Centre.

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