CiviCRM Implementation Case Study

Leukaemia and Lymphoma Research

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About the LLR

- Having gone through the software/supplier selection process, the LLR decided CiviCRM was the CRM of choice and a supplier was chosen to deliver the project by the end of 2011.

- Key objective to bring the CRM and digital output together, allowing us to personalise our services and messaging online.

- Integrated offering will help achieve the organisation objective of increasing patient benefit.

Previous Architecture

- Visual Alms CRM system (Client Server)
- Drupal Web Site
  - Bespoke Events Booking System
  - Online Donations
  - Not connected to CRM
- Export Web Participant registrations and import into CRM
- Export Web Donations and import into CRM
- External Payments Imported by Finance

Implementation

- Two phases of Go Live
- Internal CiviCRM went live with core functions 12th December 2011
  - 80 Users
  - Accounts Integration
- CiviCRM online 15th December 2011
  - Online Donations
  - Online Events

System Architecture
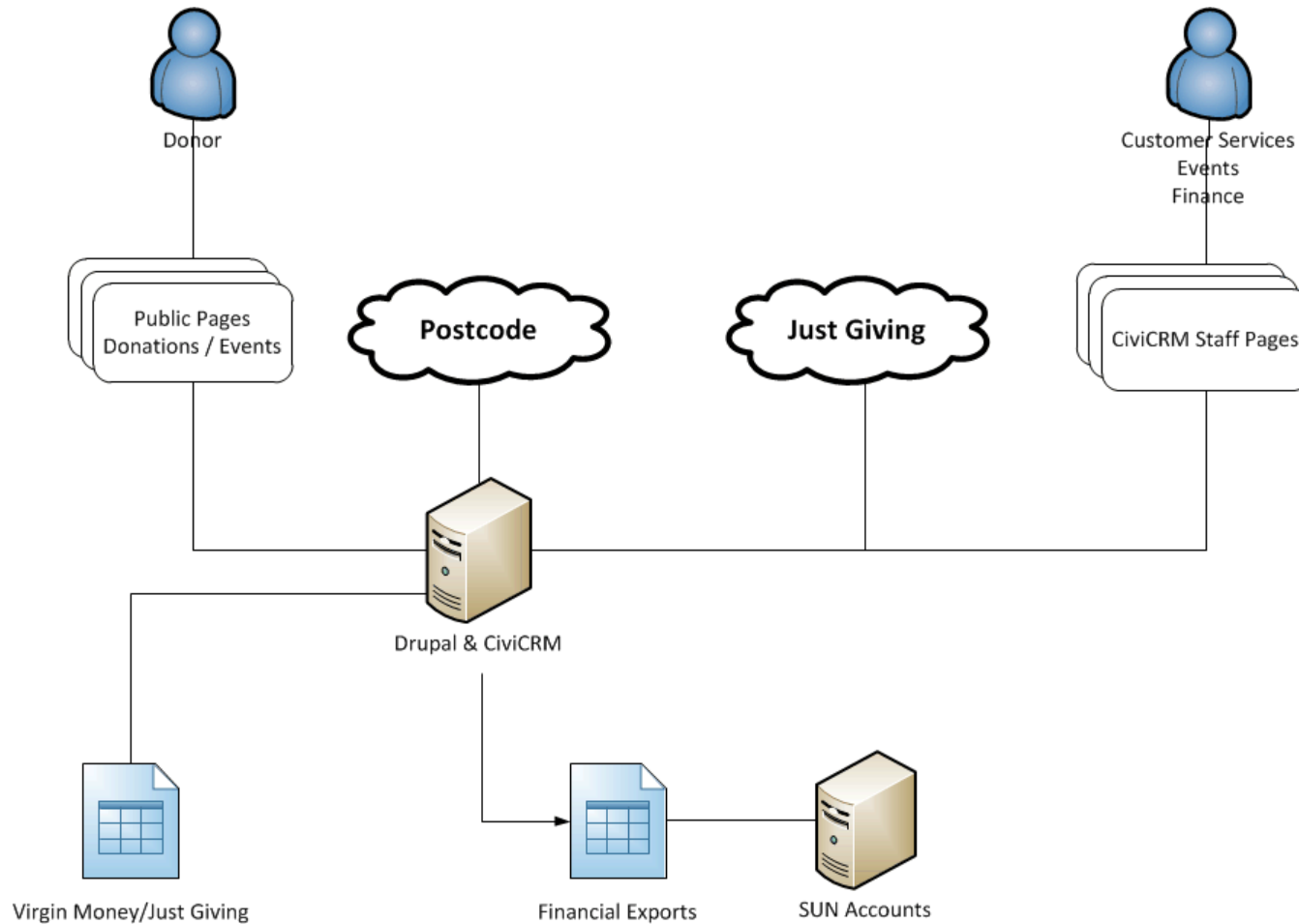
Data Migration

- Large Data Set
  - 350k Contacts
  - 190k Participants
  - 1.2Million Contributions
- Conversion from CSV to CiviCRM down to under one hour
- Conversion run about 30 times prior to go live to iron out issues
- End to end data conversion under 2 hrs

Accounting Integration

- Largest part of development
- Primary goal to allow Financial System to reconcile income
- Finance control what is posted to Finance system
- CiviCRM is not an ledger based system
- Process of Batching Contributions and posting to finance
- Posted contributions Locked Down
- Financial Adjustments to posted contributions to reverse post correction to Finance.
- Tried and tested processes
  - Batching of Contributions
  - Posting batches to Finance
  - Financial adjustments for any posted contributions

Financial Imports

- Contribution files from external sources
- Import File
  - Summary of amount to be imported
- Validate
  - Verifies file format is as expected
  - Depending on file type finds link to contact
  - Produces exceptions page for those that could not match
  - Allows manual correction of allocation
- Allocated Batch
  - Following the import process an allocated batch is produced

Performance

- Dedicated Server 24GB RAM
- Additional Indexing for certain tables
- Modified Quick Search
  - Its hard trying to find someone when you have 350k + contacts
- Converted Drupal to InnoDB
  - We getting occasional site crashes due to locking issues with Drupal tables
- Pentaho Reports for speed and efficiency
  - Tuned SQL
  - Export different formats
  - Separate server serving reports

Success Factors

- Veda Consulting (Obviously!)
- Driven Implementation Team
  - All implementer's could see the benefit of CiviCRM and wanted to make the project a success
  - Change driven by Digital team
- Well managed organisation wide 'bug list'
  - There will always be issues, they need managing by the supplier and by the client.

What's Next?

- CiviCRM 4.1.x Upgrade in test
- Drupal 7 upgrade by Summer 2012
- Enhanced Just Giving Integration
  - Waiting for Just Giving to release into production
- Contributing back to the community
  - Events bookings to not require email address
  - Financial Processing
  - Postcode integration

Chris Wolfe

IMPLEMENTING A LARGE CIVICRM INSTALL: A USERS PERSPECTIVE

About LLR

- Leukaemia & Lymphoma Research: the mission
- Revenue (2010-2011)
  - £24 million invested
  - £20 million raised
- Org Structure: Medium-sized, moderately diffuse, specialist/siloed
  - Fundraising Team Profile
  - Staff Profile

About LLR (2)

Fundraising Team Profile

- Sports Events: Cycling, Run/Tri, Walks

- Special Events: Conversations with…, VIP

- Corporate

- Trusts & Legacies

- Regional Fundraising: Branches, Scotland, Regional Managers

About LLR (3)

Staff Profile
- Fundraising Teams
- Marketing
    - Customer Services & Data
    - Digital & CRM
    - Patient Information
    - PR
    - Communications & Trading
    - Design
- Finance & Operations
- Scientific & Grants

Needs for New CRM System

- Central repository for all contact information
- Interactions (not just transactions)
- Used across entire organization
  - Cost/user
  - Remote users
  - Intuitive Interface
- Integrated with website
- Open source

Implementation

Out-of-the-box fit vs Customization

- Contributions: Batches & Letters
- Financial Adjustments
- Segmentation (hierarchical results)

Immediate improvements

- Online donations & event registration
- Searches
- Ease-of-use

Implementation (2)

Issues

- Batches: New functionality
- Letters: Mail merging en masse
- Online donation monitoring
- Search rules
- Gift Aid rules

Conclusions

Was it worth it?

Needs Addressed

- Centralized, accessible, easy-to-use repository
- Integration
- Interactions

Successes

- Integrated event registration (saving 2 days/week)
- Reduced donation processing time (2 days/month)
- Increased, distributed staff expertise

Big picture: 25 staff days saved/month

Wishes for the future

- Improved letter editing and functionality
- Importing to Address ID and custom data
- Bulk financial adjustments/soft credits
- Simple and more accessible reporting tools

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THANK YOU