CiviCRM Implementation Case Study

Leukaemia and Lymphoma Research
www.leukaemialymphomaresearch.org.uk

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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

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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

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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 implemener'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
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