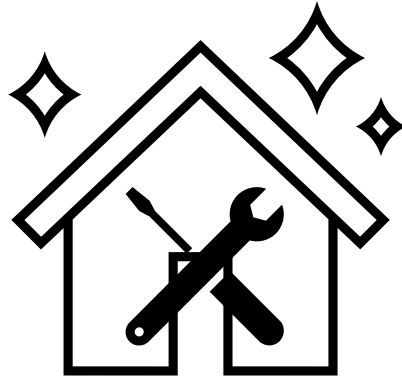# Managing a CRM Makeover

Strategies to Tackle the Refresh Your Users Deserve

Lisa **Firnberg**

She | Her

Information & Data Director

Previous Roles:

- *Deputy Director for Operations*
- *Director of Information Management*
- *Director of Professional Services*

When this **Works Best**

- Small/Medium sized organization (~40 ish users)

- External stakeholders don't interact with the system

- In-house System Administrator

- Trust & buy-in from leadership

Symptoms

Clutter

Confusion

Lack of Trust

Frustration

Convince them to **Stay**

How to **Begin** a Makeover

➤ Be a Trusted General Contractor

➤ Show Off Ultimate Handy(wo)man Skills

➤ Find your Allies and your Toughest Audience

Sample **Outline**

DECLUTTER

ORGANIZE EVERYTHING

COMMON SPACES

DIG THROUGH THE STORAGE

HOUSEWARMING PARTY

SPECIALTY ROOMS

Rebel **Change Management**

X Lengthy development cycles

X Deploy from sandbox

X Test scripts & user stories

X Formal release announcements

X Explicit pre-approval

✓ Ad hoc/as opportunities arise

✓ Direct in production

✓ "Live fire" testing

✓ Vary communication

✓ Seek forgiveness when you skip "permission"

Consider **Re-Branding**

ATLAS

salesforce

PEARL

Declutter

Landing Page/Home Screen

- Apps/Modules
- Dashboards
- Navigation Bar
- Menu Items
- Lists

Reports, Dashboards, Email Templates, etc.

- Delete or archive old items

Keep Decluttering...

Fields

- Assess the volume of data in "dusty" fields

- Listen for duplicative meanings

- Deactivate unused/stale picklist values

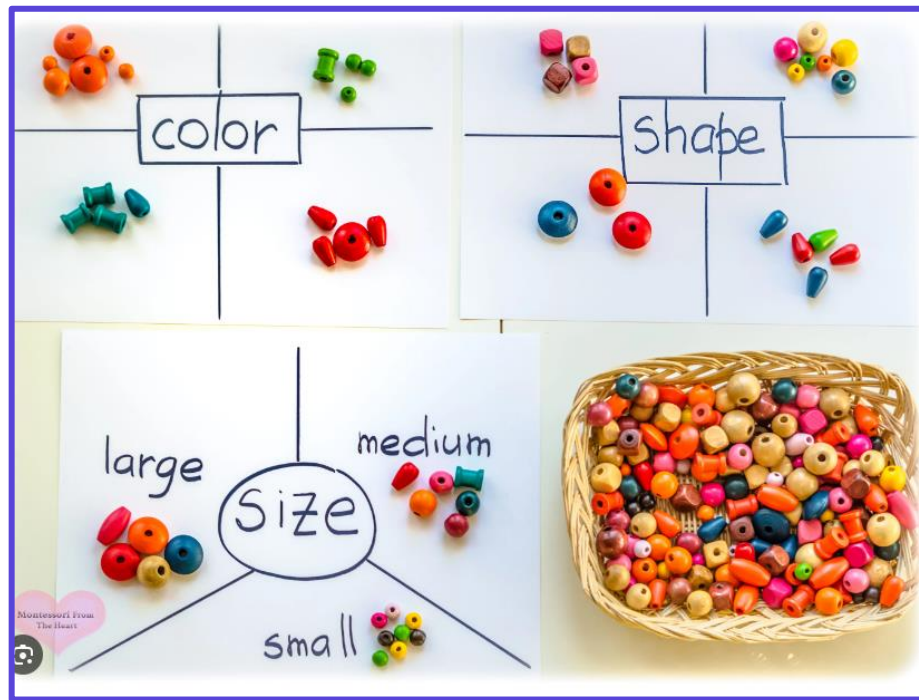- Remove unused/stale fields from layouts

Dig Through **Storage**

There's treasure hidden in there!

Re-**Sorting** & Re-**Labeling**

Campaigns - Before

Record Types:

- Parent
- Child

Types:

- Conference
- Webinar
- Email
- Membership
- Research

Membership Type:

- Event
- Communications
- Annual Membership

Campaigns - After

Record Types:	Types:
Internal Event External Event	Conference Webinar Other Event
Presentation	Presentation
Outreach	Email Newsletter
Engagement	Affinity Group Committee Board Recruitment
Fundraising	Fundraising

Department:

- Membership
- Research
- Field
- Communications
- Development

Organize

Make well-labeled places for everything to go

Page Layouts

- Section headers, tabs, regions
- Summary/highlights sections
- Help text
- Expose Missing Treasures

Make Folders

- Reports, Dashboards, Email Templates

Free LIKE A PUPPY

Design for user success: Field Placement

House**warming**

Organic/As-Needed

- Bite-sized exposure to what's relevant
- Embed yourself in existing meetings
- Centered around real-time use cases
- Concepts with clicks

Formal/Planned

- All-staff setting
- Specially scheduled session(s)
- Broad-based tour of renovations/improvements

Minor Structural Enhancements

- Validation rules with clear error messages

- Dependent picklists

- Quick-win Automations

  - Email alerts

  - Field updates

  - Record creation

- Reports, Dashboards, subscriptions

Tackle the "black box" syndrome of information in, but never back out
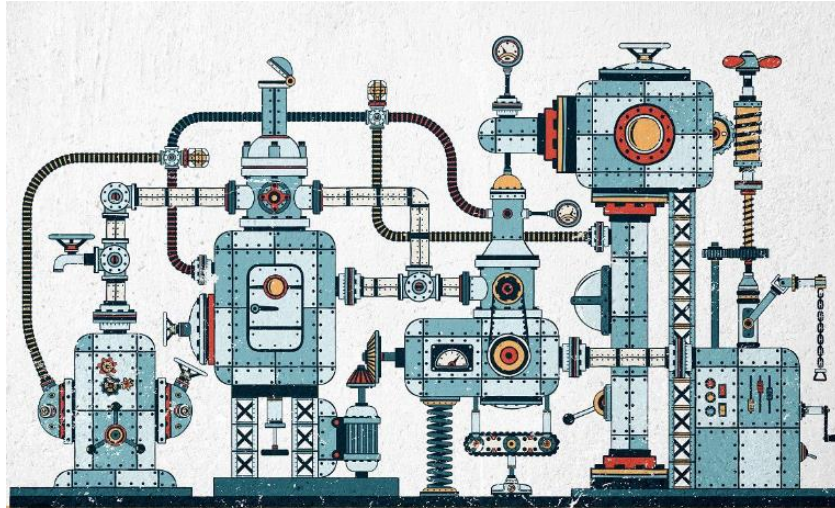
Major Structural Enhancements

Introduce New Objects, Features, Modules, etc.

Undoing or Simplifying an Existing Part of the House

Significant/Complex Automations

- Everything else was a pre-requisite – building blocks
- Start with a "specialty room" (i.e. a particular team/department/group)

Take **Aways**

- **Build trust** – first in you, then in the system

- Makeovers require an **"internal consultant" model** of system administrator, with trust and **authority to implement** in real time

- A CRM needs **constant maintenance and attention** to avoid getting stale

- It's **not a strictly linear** process

- **Intuitive user interface** is worth 1,000 trainings

- Don't give people what the *ask for*, give them what they *need*

Thank **You!**

Lisa **Firnberg**

She | Her

Information & Data Director

- o LFirnberg@ncrp.org

- o Linkedin.com/in/**lisa-firnberg**

- o https://www.salesforce.com/trailblazer/lfirnberg

www.ncrp.org