

CRM Proposal
Open.Michigan
August 31, 2010

CRM Proposal for Open.Michigan

Open.Michigan is at a point in its development where it must begin considering centralized tools for communications management. Many team members keep personal documents of contacts and activities that suit their individual needs, but these documents are not easily shared and do not offer a centralized and consistent perspective of the individuals and organizations we have reached out to, collaborated with, and supported in the past. These materials are also limited with regard to tracking projects, multiple contacts within departments and allowing Open.Michigan to assess how well it is managing its projects and collaborations across the community.

Currently the Open.Michigan team uses a combination of spreadsheets and project management tools to track contacts we've made (including contact information, notes on conversations and follow up) and to run analysis and evaluation of project scope, status and completion (see Google Doc "M1/M2 Project Management 2008 2009"). While these documents were useful for a few team members to share as they developed projects, they do not scale well as we continue to build on our relationships and activities and develop deeper, more complex relationships. Team members are currently using: spreadsheets, Google Docs, the Open.Michigan wiki and Basecamp to manage these activities. As we begin to develop new relationships and projects and foster our current relationships, Open.Michigan can now consider maintaining a team-wide centralized constituent relationship management software tool to help facilitate the cultivation of connections and the management of projects both within the team and externally.

Based on our use of tools and our mission, I propose we adopt one of the following CRM tools: HighRise or CiviCRM. HighRise is compatible with Basecamp, a tool we already use and is simple and direct but not a full CRM. CiviCRM is a fully integrated CRM that is openly licensed, free, compatible with Drupal and has a large and active developer base. It is, however, resource intensive. Below are the benefits and drawbacks, as I perceive them, to each system.

HighRise

<http://highrisehq.com/>

Free demo: credit card information required; no trial of HighRise

Overall:

"In complexity, HighRise lies somewhere between a simple spreadsheet and a complex customer relationship management tool."

From: <http://www.appappeal.com/app/highrise/>

To be used as an intermediary between no CRM and a more advanced CRM.

CRM Proposal
Open.Michigan
August 31, 2010

Benefits:

- Integration with Basecamp and a similar interface
- Multiple privacy and sharing settings
- Reminders and follow ups can be scheduled
- Notes and tags capabilities
- Email forwarding
- Compatible with [WordPress](#) (add HighRise contact form to WordPress,)
- Import contacts from Outlook or software that exports vCard format (no support for Gmail or Yahoo)
- Export into Excel, vCard, CSV
- Share contacts with other users

Drawbacks:

- Subscription fee
 - 15 users for \$49 per month is one package choice
- Not a full CRM
 - No volunteer or membership management tools and resources
 - No reporting function and little analysis tool*
 - No event settings or invites
- Limited to 30,000 contacts

*We are currently evaluating project success with Google docs.

CiviCRM

<http://civicrm.org/>

Free demo: <http://drupal.demo.civicrm.org/node/2>

Overall:

CiviCRM is a full, free, open source CRM that is very robust. It would not be a tool that would be experimented with and abandoned but a tool to cultivate over time.

Benefits:

- Full CRM system, including:
 - Report features
 - Event and membership sign up features
 - Participant and project tracking
- Open source and free
- Integrates with [Drupal](#) and Joomla

CRM Proposal
Open.Michigan
August 31, 2010

- Unlimited contacts
- Internationalization (currently supports different languages and localized formats)
- Customizable
- Import contacts using CSV or SQL query
- Export into Excel, vCard, CSV
- Share contacts with other users

Drawbacks:

- A standalone product
- Resource intensive
- May not be compatible with anticipated moves into other U-M organizations

Concluding remarks:

Systems already in place at U-M organizations we are connected to are designed for activities that are not in the scope of Open.Michigan's mission and its needs as it cultivates relationships and tracks projects. The UMMS uses [Groupwise](#). Currently the only centralized CRM the Library uses is [DART](#), a donor and alumni relationship tool. Both of these systems focus on functionality that is not applicable to Open.Michigan. DART is designed for the Development team at the Library and includes including donations and alumni management. Groupwise focuses on delivering an email and calendaring system and we already have our processes in place for these features.

While I have viewed tutorials and read reviews of each system, I have only used the demo for CivicCRM. However, I suggest that if Open.Michigan wants to start using a fully functioning CRM immediately (including more robust reporting and tracking features), CivicCRM is our best choice. It is a robust system that is both open source and compatible with our upcoming transition into a Drupal platform. This would give us the ability to conduct more evaluation of our engagement activities (including outreach, OER publications relationships and potentially international projects) and easily measure our impact.

As a transition tool, HighRise would give us the ability to quickly and easily manage our contacts and relationships. It would also allow us to merge our communications activities more fully with our existing workflow in Basecamp. I anticipate that, if we choose to use HighRise, in the next few years we will be looking at another system to employ that has richer features and deeper functionality. If we choose HighRise, we will still be running evaluations and project analysis using other tools such as Google Docs and spreadsheets. However, as we anticipate potential mergers with other university entities (one being the Library), HighRise may be the best short-term solution.