A Work Project, presented as part of the requirements for the Award of a Masters Degree in Management from the NOVA – School of Business and Economics.

BUSINESS PLANNING IN NONPROFIT: LAYING THE GROUND FOR CUSTOMER RELATIONSHIP MANAGEMENT IN INSTITUTO DE EMPREENDEDORISMO SOCIAL

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Abstract

With a growing scope of business, IES felt the need to better structure its internal information and processes so a one-on-one communication strategy with its stakeholders, a key competitive advantage, could be maintained. This work project intends to lay the ground for CRM implementation in IES, reviewing the literature on relationship marketing and analyzing the environment and context in which the institute functions and its day-to-day operations. The results suggest that IES could benefit from the implementation of the Salesforce.com CRM cloud-based software, creating interrelated databases for its three main groups of stakeholders – social entrepreneurs, social initiatives and entities.

Key Words: Nonprofit; CRM; Social Entrepreneurship.

1. Introduction

IES – Instituto de Empreendedorismo Social, established in December 19th 2008, was created due to the common belief of its founders in the need of stimulating and disseminating the field of social entrepreneurship in Portugal, so as to contributing to a greater effectiveness in the resolution of the country's social problems. The institute, a pioneer in the country, is a center of training and investigation, and aims to identify, promote, educate and connect initiatives that have a clear social mission, are innovative, sustainable, able to be replicated in other contexts and capable of producing social impact in a large scale.

IES already understands the importance of relationship marketing, maintaining high value relationships with its various stakeholders. That said, many internal processes, such as segmenting and mentoring, are currently carried on an *ad hoc* basis, with no structured

support. More so, the institute does not have a common database, with each area registering information individually with no standard criteria.

Moving forward, IES wants to expand its business, both domestically and internationally. In Portugal, the institute wants do expand its fieldwork to the whole country, broadening the number of initiatives supported, and create a social business school and an online platform of shared knowledge. In international markets, IES wants to start doing fieldwork in Mozambique and introduce its mentoring and training programs in the country. IES feels that it is not possible to maintain its one-to-one communication strategy, seen by the organization as a key point of its competitive advantage, with this increased scope of business without the right technological support, as currently its processes are greatly based on its small team knowledge of the initiatives and social entrepreneurs supported, which is not sustainable as the number of clients grows rapidly.

The purpose of the project was to ensure that all information needed and gathered by IES in its day-to-day operations was structured and actionable upon by all the different areas, with the overall goal of laying the foundation for IES to grow its portfolio of services, both in scope and range, while maintaining its standard of quality and its close relationship with its stakeholders.

2. Literature Review

The key ideas behind Customer Relationship Management are not new; it has been argued for several decades that, in order to survive, firms need to shift their focus from selling products to fulfilling customers' needs (Levitt, 1960). Boulding, Staelin, Ehret and Johnston (2005) developed a roadmap for Customer Relationship Management,

documenting the evolution of the marketing ideas behind it. The authors refer that key developments include the concept of the augmented product, stating that customers are not only interested in the core product but also on the total buying experience (Levitt, 1969), the economic concept that a transaction only takes place when both parties involved have the perception that they are receiving value (Bagozzi, 1974), and the concepts of market orientation (Narver and Slater, 1990), market focus (Day, 1994) and market-based learning (Vorhies and Hunt, 2005), highlighting the development of a good information structure and internal processes that allow a firm to understand the needs and wants of its customers. The authors also refer as important the evolution from brand and portfolio management to customer management (Sheth, 2005; Johnson and Selnes, 2004). These developments lead to a great increase of customer data in the 1980s, while vendors started to offer "*hardware and software solutions and began using the term CRM to refer to the collection of data and activities surrounding the management of the customer-firm interface.*" (Boulding *et al.*, 2005:156).

Payne and Frow (2005) documented several definitions for Customer Relationship Management and suggested a comprehensive one: "CRM is a *strategic approach that is concerned with creating improved shareholder value through the development of appropriate relationships with key customers and customer segments. CRM unites the potential of relationship marketing strategies and IT to create profitable, long-term relationships with customers and other key stakeholders. CRM provides enhanced opportunities to use data and information to both understand customers and cocreate value with them. This requires a cross-functional integration of processes, people, operations,*

4

and marketing capabilities that is enabled through information, technology, and applications." (Payne and Frow, 2005: 168).

Although the definition mentions the profitability aspect of a firm' relationships with customers, and studies show the positive impact of CRM in the for-profit sector (Morgan and Hunt, 1994) and literature regarding this field is mainly for-profit in its origin (Sargeant, 2001), researchers also suggest that customer relationship management is particularly suited for the nonprofit realm (Sargeant, 2001, Kristoffersen and Singh, 2004, Kong and Farrell, 2010, Arnet et al., 2003, McCort, 1994). Krostoffersen and Singh (2004) illustrate the successful implementation of a Customer Relationship Management program in Plan Norway, a nonprofit organization, which shows "*how non-profit organizations can effectively be market-oriented without becoming 'commercial', a dreaded adjective in the non-profit world*" (Krostoffersen and Singh, 2004: 28). Nonprofits are now operating in an increasingly competitive setting (Sargeant, 2001), estimated to account for 5 to 6% of Portugal national gross product (Azevedo *et al.*, 2012). Burnet (1992) was the first to recognize the importance of what he designated relationship fundraising, the need for nonprofits to deal with donors individually and to recognize their profile in terms of motivations and interactions. The author also identified the relationship database, a database that allows nonprofits to "*keep an individual track of all your communications with all your donors*" (Burnet, 1992: 51), as the essential key to effective relationship fundraising, seeing it as a "*tangible piece of technology vital to the success of any strategy for relationship fundraising*" (Burnet, 1992: 50). Although donors are key stakeholders for many organizations operating in the nonprofit sector, Drucker (1990) argues that nonprofit organizations have "so many more relationships that are vitally important" (Drucker, 1990:

83) and states that "every non-profit organisation has a multitude of constituencies and has to work out the relationship with each of them" (Drucker, 1990: 83). Literature has various examples of such constituents: clients, alumni, corporate supporters, recruits, channel partner, suppliers and vendors, staff, regulators and the general public. (Brown and Kalegaonkar, 2002, Kaplan, 2001, Lyons, 2001).

With all its benefits, Customer Relationship Management programs need to be well thought out before being implemented as, according to the Gartner Group, a research and advisory group, 55% of all CRM projects fail to produce results (Kirby *et al.*, 2003). Rigby, Reichheld and Schefter (2002) warned about what they see as the four perils of CRM, advising organizations to create a customer strategy before implementing CRM solutions. Krostoffersen and Singh (2004) document how to successfully implement a customer relationship management program in a nonprofit organization, stating that "*the critical success factors for any CRM initiative are dependent on the following issues: creating a strategy before implementing the CRM project, developing a corporate-level not a department-level strategy, understanding customers, not confounding the CRM technology with the strategy itself, allocating resources judiciously to provide competitive advantage, and garnering the commitment of employees at all levels.*" (Krostoffersen and Singh, 2004: 40).

3. Methodology of Analysis

A conceptual model, depicted bellow, was proposed for this work project.

Figure I – Conceptual Model
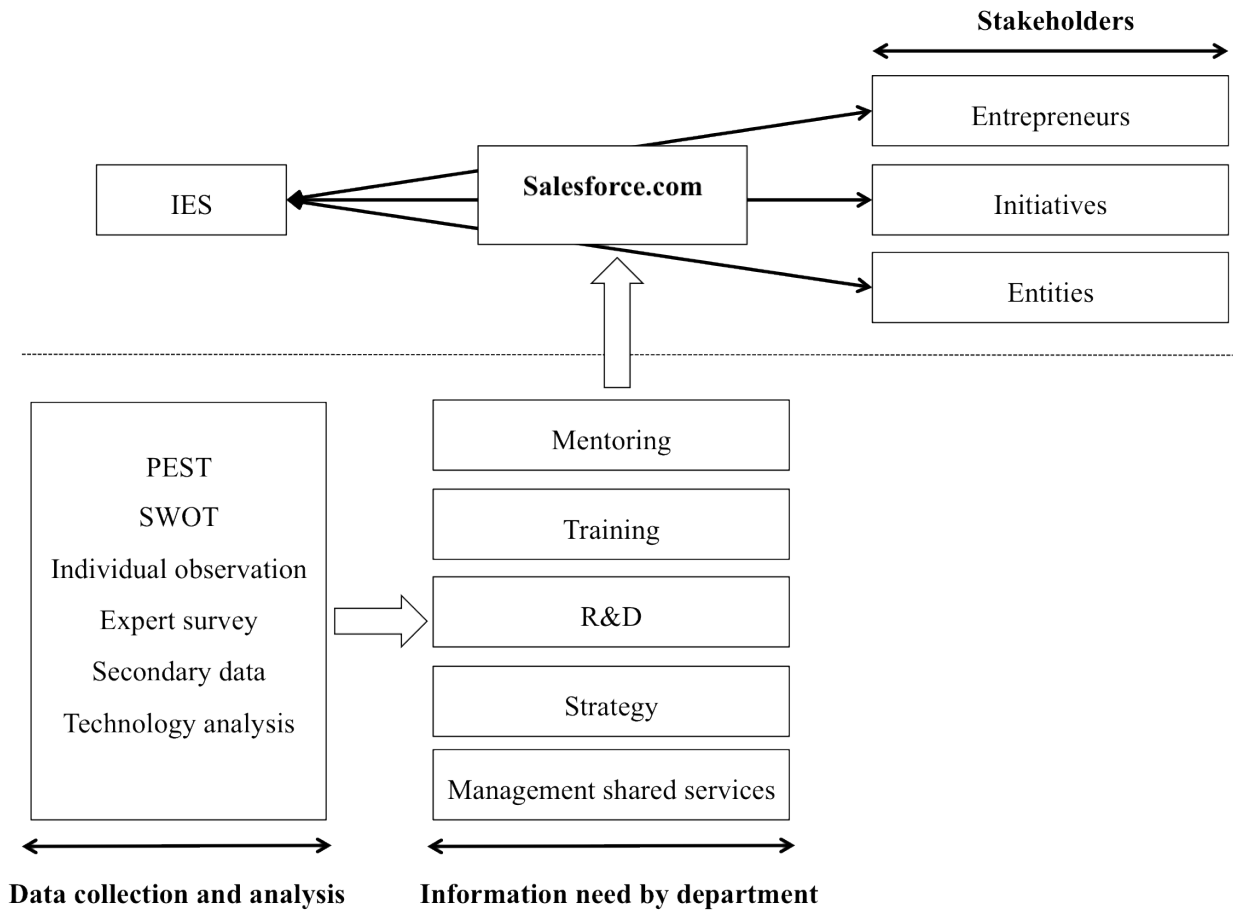
The collection of data required to identify the steps IES has to take to successfully implement a CRM program was achieved through two phases.

The first phase consisted of a macro approach, with the identification and diagnosis of the environment and context in which IES operates, as well as the interactions with its main stakeholders, achieved through:

I. **PEST Analysis:** A framework for macro-environmental factors used to analyze the environment, taking into account political, economic, social and technological factors (Azevedo *et al.*, 2012).

II. **SWOT Analysis:** A tool used to evaluate both the internal environment, through the identification of the institution's strengths and weaknesses, and the external environment, through the identification of threats and opportunities (Azevedo *et al.*, 2012).

III. **Individual observation in meetings and focus group:** It was possible to gather relevant information about IES through direct observation and participation in two meetings with Accenture, which is currently aiding IES in the development of a sustainable financial model for its mentoring area and is helping structure the institute in a way that enables it to meet its long term objectives, a focus group with social entrepreneurs that work with IES and a workshop with social initiatives that operate in Porto, Portugal.

The second phase sought to analyze the internal dynamics of IES at an area level, while also looking at the technological landscape for solutions to needs identified and to help realize IES' long-term vision. This was achieved through:

IV. **Expert survey:** 6 semi-structured interviews were conducted with the main members of the team behind IES. The interviews were conducted between the 15th March and the 26th April of 2012 and took on average 30 minutes.

V. Secondary data: Analysis of two Excel files used by the mentoring team as a database, two surveys conducted by IES in its field research of ES+ and the enrolment process for BootCamp.

VI. Technology analysis: Analysis of the different software CRM solutions offered by the top vendors in the market, with special focus on tools aimed at small businesses and nonprofits.

4. Discussion of Results

Following the methodology described above, the information needed to make a recommendation regarding the implementation of CRM in IES was collected.

As previously described, the methodology followed a two-phases approach, with different objectives for each phase: (1) Identify the environment in which IES operates and its interactions with stakeholders, (2) Analyze IES at an internal level, observing day-to-day operations and identifying the main needs, and compare different solutions available in terms of CRM.

i. Identify the context in which IES operates and its main stakeholders

In order to better understand the context in which IES operates, a PEST and a SWOT analysis were prepared:

Table I: PEST Analysis

Political	Portugal has a stable democracy and is presently lead by a right-wing government, which defends a vision of a society more autonomous and

	less dependent on the state. While this position can have a negative impact on more traditional nonprofit organizations, characterized by a high dependency on state funds, it also creates a flourishing environment for social entrepreneurs with initiatives characterized by innovative and sustainable business models.
Economic	In Portugal the third sector is estimated to represent 5 to 6% of the gross domestic product, have 350.000 collaborators and represent 15% of the Portuguese real economy (Azevedo *et al.*, 2012). Portugal is currently in an economic recession with severe austerity measures being taken by the government. This has strong implications for the third sector, in both the supply and demand side of organizations. In the supply side, there is less financial support for social initiatives, resulting in an increased pressure in terms of financial structure. In the demand side, the level of social problems is increasing, and consequently the number of people supported by the third sector.
Social	It is estimated that, until 2060, Portugal will continue to have approximately 10 million habitants, accentuating the trend of an older population with three elderly people per each young person (Instituto Nacional de Estatística, 2009). This trend can have two main implications for social initiatives. In the supply side, there is a high skilled group of people who can choose to occupy its time with social projects. In the demand side, this means that a sector of the population highly supported

	by social initiatives will increase in the future. Although there are few studies regarding the volunteering activity in Portugal, the numbers have been increasing in the last few years and it is estimated that 1 in 6 people dedicate some time to volunteering activities[1].
Technological	Portugal has a strong infrastructure in terms of technology and an innovative track record, being characterized as an innovation growth leader with an average growth rate of innovation above 5% in 2011. (European Commission, 2012).

Table II: SWOT Analysis

Strengths	Weaknesses
• Exclusive portfolio of training programs offered in partnership with INSEAD; • High skilled team; • Pioneer in Portugal in the field of social entrepreneurship; • Strong network of social entrepreneurs, social initiatives and entities.	• Unstructured organization of information; • Limited brand awareness to the general public when compared with more established players in the Portuguese third sector; • Some social entrepreneurs have a low willingness to pay for some IES' services, such as mentoring, as the institute initially offered them for

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[1] According to http://www.jn.pt/PaginaInicial/Sociedade/Interior.aspx?content_id=1235773

	free to some initiatives.
Opportunities • In a recession scenario, social initiatives are more aware of the need for a skilled and trained management team, capable of increasing initiatives' efficiency and creating sustainable business models; • In the last few years the importance of the third sector and of the field social entrepreneurship has increased, with the younger generation increasingly considering it a viable career path, which represents an opportunity for IES to become a reference in a growing segment.	**Threats** • The lack of overall financing can lead initiatives to focus their resources in running their core activities and deprioritize training; • The growth of the sector could represent higher incentives for competition specialized in the social entrepreneurship field.

After analyzing the environment in which IES operates it was important to understand the constituency of IES, as CRM is, at its core, a relationship-marketing tool.

Through individual observation in different meetings and a focus group, the main groups of stakeholders were identified, as well as their interactions with IES:

- **Social entrepreneurs** – the organization works with social entrepreneurs in all different phases of consciousness and knowledge regarding social entrepreneurship, from those who do not have a clear understanding of what the term entails to those with high impact social initiatives established. This group of stakeholders enters in contact with IES in different ways: through spontaneous contacts, participation in training programs or through connections with social initiatives that are identified in the fieldwork as having potential for a high social impact.

- **Social initiatives** – this group of stakeholders entails all the social initiatives that work with IES and that came across the organization through social entrepreneurs that have a relationship with IES or through direct identification in the fieldwork. IES segments these initiatives according to potential for social impact and life cycle, proceeding to offer training programs according to the specific needs of the initiatives, with the overall goal of helping realize the potential for social impact, through the creation of sustainable business models that are replicable and scalable.

- **Entities** – this is a very broad group of stakeholders, which includes IES' associates, companies that have a strong relationship with the organization and invest in it, either financially or by offering services, universities where

IES offers training programs and companies that have a strong interest in social entrepreneurship and the financial means to invest in social initiatives.

ii. Analyze IES at an internal level, observing day-to-day operations and identifying the main needs, and compare different solutions available in terms of CRM.

In terms of structure, IES is currently organized in six main areas: mentoring, training, research and development, communication, strategy and management shared services. Through the interviews conducted and analysis of secondary data, it was possible to better understand how the different areas operate, observe IES' flux of information, both internally and with its main stakeholders, and identify the main information needs for each area:

- **Mentoring** – this area is responsible for managing all the spontaneous contacts, both from social entrepreneurs and from initiatives, and mentoring all the social entrepreneurs and initiatives that are either alumni from IES' training programs or that are identified as ES+, initiatives that are recognized by IES as having a high potential for social impact. The area segments the initiatives according to two criteria, potential for social impact and life cycle, and then proceeds to forward them to the appropriate training program. The area also registers all the needs identified in the different contacts, both spontaneous and from social entrepreneurs and initiatives with an established relationship with IES, and forwards this information to the training area, which develops new training packages when justified. Currently the segmentation and mentoring of initiatives tends to be a more *ad hoc* process, being one of the objectives of the area to have this be a structured

and automated process. The registration of information is currently done in two different Excel files, one for contacts and one for needs identified, in an unstructured way.

- **Training** – this area is responsible for IES' training programs, having direct contact with social entrepreneurs and initiatives. In terms of registration of information, the area does a survey after each training session, collecting information regarding the initiatives, feedback from the session and the main needs felt by the initiatives. All this information is registered in a excel file. When the area feels that there is sufficient need for a new training program, it forwards the information for the research and development area that develops new content.

- **Research and Development** – this area is responsible for all the field work that IES does, collecting information regarding different initiatives that serves as basis for identifying the restrict group of ES+. The area also develops contents for the training programs and different case studies, based on initiatives that work with IES.

- **Communication** – this area is responsible for marketing the different initiatives that work with IES in the organization's communication channels and communicating to the different initiatives the training sessions available, according to previously identified needs and historic participation.

- **Strategy** – this area is responsible for setting the vision and strategy of IES, while maintaining the different relationships between IES and its associates and keeping track of the different resources available between them.

- **Management Shared Services** – responsible for IES' accounting, tracking all the expenses incurred by the different areas and the work hours of the different collaborators.

The last element of this phase consisted in comparing different technological solutions for CRM implementation in an enterprise. The editors of CRM Magazine compared the different solutions offered by the top vendors of CRM software in its 2010 CRM Market Awards (McKay *et al.*, 2010): Microsoft, Oracle, RightNow Technologies, Salesforce.com, SAP, Netsuite, Maximizer Software and SugarCRM. The overall rating was based on a composite score of CRM revenues, year-over-year revenue growth and analyst ratings for customer satisfaction, depth of functionality and company direction. Salesforce.com had the highest scores in all the categories where it was competing, including the one suited for IES: small-business suite CRM. In this category Salesforce.com scored 4.8 out of 5, with the authors noting its great value for small businesses due to its application of cloud-based software and the company's strategic direction, identified as a key differentiator and ahead of the other software vendors, with mobile functionalities as an example. It is also important to note that Salesforce.com started the Salesforce Foundation, donating to eligible nonprofits 10 free Enterprise licenses (Salesforce Foundation, 2012).

5. Recommendations and Conclusions

Based on the information collected it can be concluded that IES can strengthen its competitive advantage through the implementation of a CRM program.

One of the weaknesses identified in IES during this analysis was a lack of structure for its information, which was not readily available for the different areas. Presently IES can maintain its one-to-one communication strategy with its stakeholders mainly due to a relatively small scope of business, which allows IES' team to keep an accurate depiction of the activities, needs and interactions with the institute of the different stakeholders without keeping structured records. Moving forward, the growth of business will require more structured internal processes to keep up with the increasing data and a bigger team will imply that coordination of the different areas will be harder and less efficient without shared and updated information. Consequently, it is key for IES to develop the right CRM strategy so as not to lose one of its main strengths, the high value interactions with stakeholders, as the market becomes increasingly competitive.

Key success factors were defined for the implementation of CRM in IES and a structure for the information was suggested. In terms of software, it needed to respect the following criteria:

- Be cost efficient;
- Offer a high level of customization in order to be tailored to the needs of each area;
- Be integrated into everyday business applications and decisions;
- Be easily shared and updatable by the whole team so the information was always updated and complete;
- Have the capability to produce reports according to criteria defined by the different areas;
- Allow the creation of mailing lists.

Based on the criteria found, it is recommended that IES adopts the Salesforce.com CRM software. As previously stated, this solution is regarded as the best in the market for small businesses, having all the functionalities needed by IES and offering a cloud service that is easily accessible and updatable by the whole team. Furthermore, the solution is also extremely cost efficient as the Salesforce Foundation donates licenses to nonprofits and the learning curve for the software is relatively low, representing a small amount of time spent by IES' collaborators in the transition.

From an organizational standpoint, the following key success factors were defined for a successful implementation:

- The importance of the implementation of the CRM project and its capabilities and opportunities needed to be communicated and understood by the whole team, and each area should be involved in the implementation process;
- The success of the CRM project is dependent on the level of planning; a clear structure of how information should be organized is needed.

Regarding the information structure, it is recommended the development of three interrelated databases, one for each group of stakeholders identified, being extremely important that these databases do not to function separately. Relations for related items in the different databases should be created so that the information is always updated. For example, it is important for IES to know which social entrepreneur is connected to which social initiative, and in which role. It is also recommended the customization of the database for the management shared services, so that the institute can keep track of

expenses for different activities regarding projects with stakeholders. It is presented bellow

the recommended structure of information:

Figure I – Recommended structure of information

	Areas						Stakeholders
	Mentoring	Training	R&D	Communication	Strategy	Shared Services	
Basic information regarding the initiative (name, contacts, key people associated)							Social Entrepreneurs
	✓			✓			Social Initiatives
							Entities
Information needed to segment the initiatives (potential for social impact and life cycle)							Social Entrepreneurs
	✓						Social Initiatives
							Entities
Historic of interactions with IES (contacts, needs identified in each contact and steps taken afterwards)	✓						Social Entrepreneurs
	✓						Social Initiatives
							Entities
Historic regarding participation in IES' training (including feedback)		✓		✓			Social Entrepreneurs
		✓		✓			Social Initiatives
							Entities
Nature of the initiative (ES+, Alumni)							Social Entrepreneurs
	✓	✓	✓	✓			Social Initiatives
							Entities
Results of the field work							Social Entrepreneurs
			✓				Social Initiatives
							Entities
Authorization for media sharing and media package (logo, photographs and description)							Social Entrepreneurs
				✓			Social Initiatives
							Entities
Availability of resources and nature							Social Entrepreneurs
							Social Initiatives
					✓		Entities
Expenses tracker for different projects and collaborators						✓	Social Entrepreneurs
						✓	Social Initiatives
						✓	Entities

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7. Appendices

Appendix I – Example of Social Entrepreneurs view in Salesforce.com

▼ **Contact Details**

Name	Mr. Pedro Tunes		Private	
Household	Tunes Household		Contact Owner	Pedro Tunes [Change]
Account Name	AHEAD		Naming Exclusions	
Title	Presidente			
Data de Nascimento	07/07/1988			
Description				

▼ **Contactos**

Contacto telefónico preferencial	Telefone pessoal		Email preferencial	Email trabalho
Telefone Pessoal			Email Pessoal	pedrotunes@me.com
Telemóvel Pessoal	926646838		Email Trabalho	pedrotunes@ahead.org.pt
Telefone Trabalho			Morada	Rua António Aleixo nº1 2ºFrente
Telemóvel Trabalho				

▼ **Formações IES**

Formação	Workshop Empreendedorismo Social		Data Formação	03/04/2012

▼ **System Information**

Created By	Pedro Tunes, 04/04/2012 12:18		Last Modified By	Pedro Tunes, 04/04/2012 19:39

Edit   Delete   Clone   Copy Address to Household

Organization Affiliations   New Iniciativa Associada   Organization Affiliations Help

Action	Account Name	Membership Join Date
Edit	Del AHEAD	

Contactos   New Contacto   Contactos Help

Action	Contacto	Data do Contacto	Pessoa Contactada	Necessidade	Oportunidade	Respondido
Edit	Cls	00001029	04/04/2012	Pedro Tunes	Fontes de Financiamento	Workshop Empreendedorismo Social	

Appendix II – Example of Entities view in Salesforce.com

Entidade Detail   Edit | Delete | Convert | Clone | Find Duplicates

Name	Alberto Caeiro	Lead Status	Open - Not Contacted
Company	CRID	Tipo	Parceiro
Industry	Not For Profit		
No. of Employees	25		
Iniciativa associada	CRID		
Address	Rua de Faro, Bairro de Alcaide - Alcabideche, Portugal	Preferred Email	
Preferred Phone		Email	cridcascais@yahoo.com
Mobile		Website	http://www.crid.pt/
Phone	214840099		
Fax			
Created By	Martim Quaresma, 04/04/2012 22:50	Last Modified By	Martim Quaresma, 04/04/2012 22:50
Description	CRID – Centro de Reabilitação e Integração de Deficientes		
Recursos	Físicos; Materiais		

Físicos (auditórios, espaços, ...)
Materiais (sistema de som, projector, tendas, carrinha, ...)

Edit | Delete | Convert | Clone | Find Duplicates

Open Activities   New Task | New Event | New Meeting Request   Open

No records to display

Appendix III – Example of Social Initiatives view in Salesforce.com

Iniciativa Detail   Edit | Delete | Sharing

Account Name	AHEAD [View Hierarchy]	Account Owner	Pedro Tunes [Change]
Data de Lançamento	27/12/2007	Website	http://www.ahead.org.pt
Formação		Type	
Data Formação			

▼ Descrição

Senioridade	Crescimento	Autorização de partilha para os media	✓
Sector de Actividade	Educação de Adultos	Autorização de partilha entre os peers	✓
Público-Alvo	Crianças; Estudantes		
Área geográfica de intervenção			
Missão	Contribuir para um mundo com maior igualdade de oportunidades através da educação.		
Descrição			
Número de trabalhadores	1 a 5		

▼ System Information

Created By	Pedro Tunes, 04/04/2012 12:21	Last Modified By	Pedro Tunes, 04/04/2012 20:07
		Parent Account	

Edit | Delete | Sharing

Affiliated Contacts   New Iniciativa Associada   Affiliated Contacts Help ?

Action	First Name	Last Name	Role	Status	Start Date	End Date	Formação
Edit | Del Pedro		Tunes	Presidente	Current	03/04/2012		Workshop Empreendedorismo Social

Notes & Attachments   New Note | Attach File | View All   Notes & Attachments Help ?

Action	Type	Title	Related To	Last Modified	Created By
Edit | View | Del	Attachment	AHEAD.jpg	AHEAD	04/04/2012 12:52	Pedro Tunes

Appendix IV – Example of recording a new Social Initiative in Salesforce.com

Appendix V – Example of recording a new contact in Salesforce.com