



## *The VISTA and the Database*

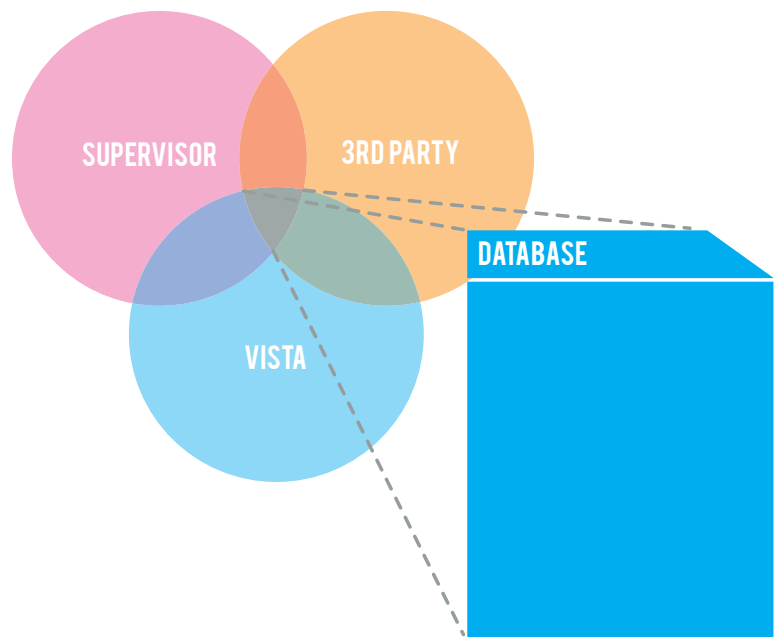
by Howard Fisher

For ten years, the Transmission Project has recruited one-year Americorps\*VISTA members (VISTAs) into its Digital Arts Service Corps and placed them with community-based media organizations in support of an explicitly-defined capacity-building project. Recently, Salesforce has seen increased levels of adoption among non-profits. This article delves into both the situations that have enabled past VISTAs' successes and the setbacks that have hindered them in implementing this new platform.

Salesforce is an example of a tool that performs CRM: Customer (or Constituent) Relationship Management, and in recent years, many community-based non-profits across the country have been making the transition from database software such as Excel or FileMaker Pro to Salesforce's online platform. Among competing CRMs, Salesforce is lauded for its ability to integrate with other applications in order to keep track of the habits, preferences, tastes, and behaviors of volunteers, donors, clients, and other community members. Indeed, Salesforce's customizability and the fact that it is free for most non-profits make it a powerful tool and lend it a wide appeal. There are many **Salesforce success stories**<sup>1</sup> on the company's website (most of which involved the help of a non-profit consulting group), but in accordance with the Transmission Project's philosophy of Honest Practice, this article will explore precisely what factors determine success or failure.

In an article on idealware.com, Paul Hagen, a consultant on non-profit CRM projects, advises on how to best go about making the transition from an older platform to Salesforce. He suggests that rather than dedicating time to implementation (that is designing the database and transferring constituent data), those who use Salesforce effectively as a CRM and communication

tool "1) spend the bulk of their time up front defining their processes and then choose software that matches those processes; 2) spend the necessary time after implementation managing the cultural change within the organization (incentives, reporting, training, executive use)." Hagen also notes that, depending on an organization's requirements and the necessary level of customization, it may be worthwhile to invest in third-party help to implement Salesforce or another tool. And there is a **community of developers and volunteers**<sup>2</sup> who do just such consulting.



1 <http://www.salesforce.com/customers/>

2 <http://www.salesforcefoundation.org/volunteers>

Hagen gives sound advice, but it requires a bit of interpretation with regard to capacity building. Assuming that Salesforce is the right choice of system for an organization (and that is a big assumption) the implementation of the new database will often play out in a context of scarcity -- both of human resources and necessary skills. The question that follows is what qualifies as an appropriate role for a VISTA (or any 1-year, fulltime volunteer) in filling this organizational gap. Because of the highly customizable, technical nature of Salesforce, organizations tend to perceive a lack of technical expertise where in fact there is an even greater need for someone to manage and facilitate the implementation process as a whole. As our experience has shown, regardless of technical know-how, the VISTA cannot carry the burden of implementing Salesforce alone and most definitely cannot be expected to fulfill both the role of technical implementer and that of project manager unless there has been significant planning ahead of time. If there is to be third party help, which we highly recommend, it must be sought in addition to the VISTA -- and preferably as part of the planning process, long prior to his or her arrival.

By far the most extreme case in our records, one VISTA found personally developing a Salesforce database so daunting an endeavor that she left her position at the United Teen Equality Center (UTEC) -- a youth-focused community center in Lowell, MA that provides a safe haven for underprivileged youth while also offering them leadership opportunities and encouraging their civic engagement. The VISTA had been charged not only with customizing Salesforce, but also with managing the migration of data and orienting staff to the new system. In this instance, despite what her supervisor described as "significant database experience," the VISTA simply found the project to be too much to handle given her multiple roles, her timeline, and the limited support she received. Of the experience, she wrote:

A huge responsibility that I have is implementing this database system to help organize and be more efficient in keeping track of our individual donors, funders, community partners, politicians & businesses. I have already taken the webinar for Salesforce Fundamentals and have already taken the New Customer Orientation for the Donor Management Suite, however, I am still a bit confused. I emailed [...] one of the support staff a few days ago regarding my tech questions and just gave him a call and he has yet to get back to me.

The power of Salesforce is its flexibility, but its successful implementation requires a great deal of knowledge concerning how the organization works and what its needs are. That is to say, prior experience with databases does not necessarily translate into success with Salesforce. More important still is that the VISTA know the ins and outs of the organization's processes and its members different roles and have the appropriate support of supervisors to access staff and acquire the necessary information. An understanding of Salesforce's technical workings is not enough to prepare an outside volunteer like a VISTA for coordinating an organization's worth of data on top of tailoring the platform to an organization's operational and cultural needs.

UTEC eventually succeeded in completing the migration to Salesforce, and their Development Associate reports that the comprehensive list of support relationships that the VISTA had made was extremely useful in laying the groundwork for the transition, as was the advice of an outside volunteer who helped prepare staff for and stimulate enthusiasm around the transition to a new database. Once a foundation had been set, everything else seemed to fall into place even though the VISTA had left.

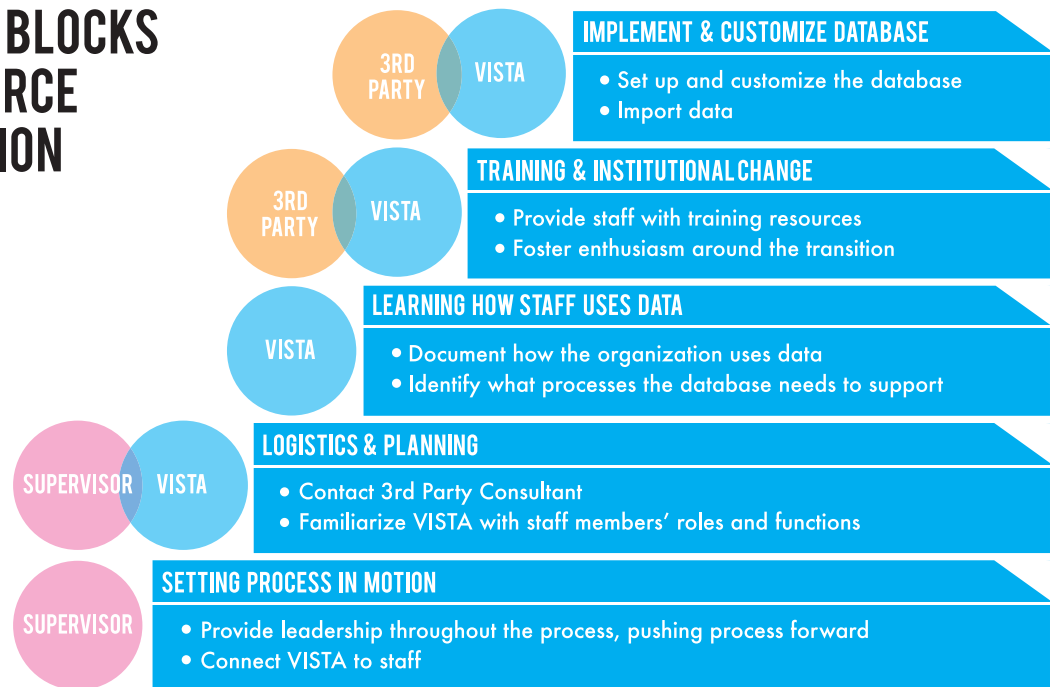
To be sure, organizations desiring to switch to Salesforce should bring in outside help with whom they can consult on how to design the best database for their needs and how to culturally prepare for the switch. This process should ideally begin prior to a VISTA's involvement. When the resources to set the process in motion are unavailable, however, it should be the VISTA's first duty

to establish these outside relationships. Indeed, a VISTA can and should function as liaison between organization and tech volunteer. Marc Baizman (<http://www.mcgtraining.com/>), organizer of the **Boston Nonprofit Salesforce User Group**<sup>3</sup>, gives us some insight into under what circumstances it is especially important to have outside help besides a VISTA. He says, “A few things that signal ‘you need extra help’ to me right off the bat” are when the organization

- requires web integration with Salesforce (anything more complex than a 1-way “contact us” form that goes into SF)
- needs integration with other software (Quickbooks, Raiser’s Edge, Access/FM Pro, etc.)
- has unrealistic timeline expectations (“this should take a couple months”)
- lacks staff buy-in (“why do we need this new system? We can get by with what we have now.”)

Outside consultants, he further insists, can assist with any of these points and can be involved at any stage in the process, but there are things that will make them more or less successful. No matter what the nature of their involvement, technical volunteers will always need that prerequisite knowledge of an organization’s internal processes. A VISTA can be in charge of collecting and documenting this information.

## THE BUILDING BLOCKS OF A SALESFORCE IMPLEMENTATION WITH A VISTA



Furthermore, the VISTA’s ability to take this initiative requires that leadership provide some guidance in addition to convincing staff to work alongside the VISTA and third-party consultant. While serving with a program that seeks to improve the lives of foster youth, one former VISTA reported, “I spent about three months banging my head against a computer and cursing out online tutorials before we finally made some progress when I was able to get a volunteer from the Salesforce Foundation to help us design the platform. This happened in early December, and since then he and I have been working on the design and are aiming to have it be ready by late January!” Rather than being assigned to tackle the database on his own, the VISTA would have been better off had he been told he needed to contact outside technical help immediately and thus lay the cornerstone for the actual implementation.

<sup>3</sup> <http://www.meetup.com/nonprofitsalesforceboston/>

Another VISTA, who served at a community arts and education center in rural Kentucky, put it perfectly when she made an appeal for help on the Digital Arts Service Corps's message board: "Does anyone know of a good consultant to bring in to help us think about Salesforce? We need to customize it to best suit our needs, and know that we can't do that alone..." The same Kentucky organization did eventually engage a low-rate technology consultant to aid with the data migration. However, a year later, a second VISTA had been taken on to continue the project by training staff in Salesforce, and still trouble with the new database persisted. According to a mid-year report, the organization's second VISTA, "found working with our Salesforce database to be a significant challenge, due to data being spread out over various platforms. As a result, we are still in the process of working to improve the database." While the VISTA did have prior experience in training staff on the use of media tools and although he worked under the guidance of a supportive supervisor, residual problems from the first phase of implementation clearly affected his ability to move the project forward into the training process. As opposed to a shortage of technical experience, the lack of a concrete plan from the process's early stages proved to be the greater barrier.

That said, there have been success stories of VISTAS who have worked alongside staff in other capacities to arrive at a functional implementation of Salesforce. From 2009-2010, Robyn Haas served in St. Louis, MO with KDHX Community Media, where she successfully helped coordinate between departments to learn what they needed from the new database as she assisted with the integration of contact data from Salesforce into the organization's website. Robyn worked under the direct supervision of KDHX's IT director Steve Ley, who himself had prior knowledge of Salesforce. Ley mentioned in his written support of Robyn's appointment to a VISTA position that, "The applicant is likely in need of some project management training and practice in database administration. Knowledge of Salesforce.com and practice with PHP and MySQL are underdeveloped for certain aspects of this position, but there will be many opportunities for learning throughout the process." Robyn's training in management was at least as relevant to the project's favorable outcome as the development of her technical skills, as was the project planning that preceded her appointment. KDHX's project proposal similarly emphasizes that, "The VISTA member will also have access to all KDHX staff members and will receive the training, support, and organizational knowledge necessary to work on this project and achieve success." It is likely that not only Robyn's technical experience (her degree in Computer Science and former work doing web-development and software testing for non-profit organizations), but also her ability to access her engaged and supportive supervisor and other staff members contributed to the successful implementation of Salesforce.

From our past experience we can derive our conclusions and make recommendations in addition to Hagen's more general advice.

- Given his or her power within and prior knowledge of the organization, the supervisor must provide the VISTA with access to the organization's community and be actively supportive in removing roadblocks and pushing the project forward.
- 3rd party assistance is a must. This person, whether a volunteer or a consultant, should be contacted in the early stages of the process, whether by staff (preferable) or by the VISTA.
- The VISTA will require training and professional development beyond online seminars and will need to be engaged with the Salesforce community. The VISTA's initial level of experience with databases is only important insofar as it allows him or her to talk with staff members and communicate with and learn from the more technically experienced.
- The VISTA's (and thus the project's) focus should be on the context of the transition (documenting and critically examining the organization's processes and how its members do their work), not only on the technical aspects of the transition.

Switching to Salesforce is always an ambitious undertaking. Even a technically savvy person working full time for one year cannot be expected to successfully integrate Salesforce into an organization's operations by him or herself. This makes a prerequisite framework, the support of supervisors and consultants, and the VISTA's familiarity with the organization's processes all the more important in order to avoid a protracted transition. When an organization lacks the time, resources, and capacity to lay the groundwork necessary for such a transition, the energy and knowledge that a VISTA member brings will be best applied to the planning and management of a data migration by documenting how an organization uses data, by assessing what data is worth keeping, and/or by engaging outside experts who can help address the technical peculiarities and requirements of Salesforce itself.

Howard Fisher is a Digital Arts Service Corps member serving at the Transmission Project Headquarters. One of his roles is to conduct research on emerging trends in the public media and non-profit fields.

## ***Useful Resources:***

### **Salesforce-approved volunteer resources**

<http://www.salesforcefoundation.org/volunteers>

### **Salesforce success stories**

<http://www.salesforce.com/customers/>

### **The Salesforce User Group Community**

<http://sites.force.com/usergroups/>

### **The Nonprofit Salesforce Practitioners Google Group**

<http://groups.google.com/group/npsf/>

### **Idealware Articles**

<http://www.idealware.org/>

<http://www.idealware.org/blog/2008/01/ask-idealware-whos-using-salesforce.html>

- "Who's Using Salesforce"

<http://www.idealware.org/blog/2007/12/salesforce-strengths-costs-and-limitations.html>

- "Salesforce Strengths, Costs, and Limitations"

### **Techsoup Articles**

<http://www.techsoup.org/learningcenter/volunteers/page11651.cfm>

- "Working with Technical Volunteers Manual"

<http://www.techsoup.org/learningcenter/techplan/page5072.cfm>

- "Selecting the Right Technology Vendor"

### **Benton Foundation's Technology Literacy Benchmarks for Nonprofit Organizations [PDF] (See especially Section A. "Technology Planning")**

<http://www.benton.org/publibrary/stratcom/techlit.pdf>