

# Choose CiviCRM, now what?: Case Study of Implementation

You or your organization has made the decision to move forward with CiviCRM as the organizations main CRM. Now what do you do? This session will walk through the process of installing CiviCRM through importing your data.

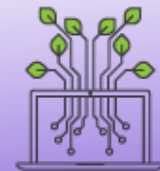
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and

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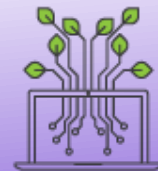
Reach Out and Read Colorado



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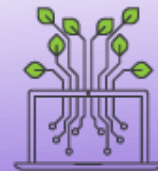
# Agenda

- Phases of Implementation
- Case Study of each phase based on ROR experience
- Questions and Answers



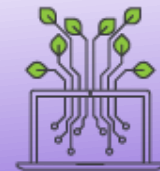
# Phase 1: Install CiviCRM

- Local vs Web based
  - Hosting Decisions
- Install CiviCRM
  - Technical person in organization OR hire CiviCRM partner



# Phase 1: Install CiviCRM- Case Study

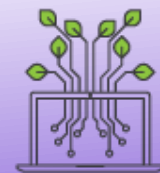
- WordPress based Website hosted on Bluehost
- Upgrade to a VPS server through Bluehost
  - Increased yearly hosting fee
- Install CiviCRM on Word Press Site
  - Hired CiviCRM partner



# Phase 1: Install CiviCRM- Case Study

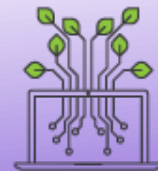
- **Hosting Comparisons** (not exhaustive, based on 2014 prices)

	Bluehost Shared-Basic	Bluehost Shared-PRO	Bluehost VPS	CiviHost Shared	CiviHost VPS
Monthly Hosting	\$4.95	\$19.99	\$19.99	\$20.00	\$250.00
Dedicated IP	3.33/month	Free	Free	30/yr	30/yr
Site Backup Pro	\$19.99	Free	\$19.99	Free	Free
SSL	\$49.00	Free	\$49.00	\$50.00	\$50.00
Totally Monthly	\$8.28	\$8.28	19.99	\$20.00	\$250.00
One Time Cost	\$68.99	\$0.00	\$68.99	\$80.00	\$80.00
<b>TOTAL FOR YEAR</b>	<b>\$168.35</b>	<b>\$239.88</b>	<b>\$308.87</b>	<b>\$100.00</b>	<b>\$3,080.00</b>



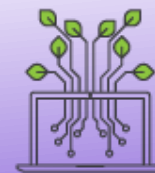
# Phase 2: Organizing and Mapping Data

- Where is data current living and how can it be accessed?
- Where in CiviCRM will this data live- field names?
  - Will there need to be custom fields created
- Data Clean Up



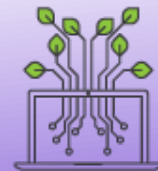
## Phase 2: Mapping Data- Case Study

- Legacy database Sage Fundraising 50
- Evaluating current data storage techniques vs best practice and more sophisticated system
  - Events and Solicitations
  - Contact types- Households, Individuals, and Relationships



# Phase 3: Data Import and Testing

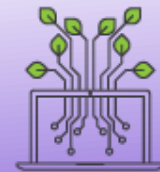
- Moving all the data from legacy database into CiviCRM
  - User Interface using Excel files
  - API/back end – need technical staff or hire CiviCRM partner





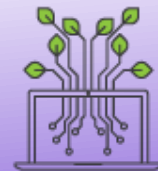
# Phase 3: Data Import- Case Study

- API/back end
- Complications with Household Names, Addressee
- Past Event Data- how to handle “no name” attendees



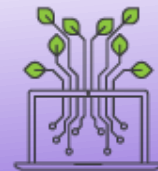
# Phase 4: Training and Use

- Training staff to use database but also on any changes in organization processes and procedures
- Reporting
  - Built in Reports and Templates
  - CiviCRM Extensions
  - Custom Reports (requires code)



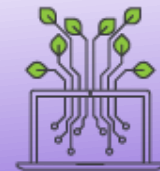
# Phase 4: Training and Use- Case Study

- User training and manual provided by CiviCRM partner
- ROR process adjustments around
  - Reports
  - Donations
  - Grants



# Case Study Take Aways

- All phases took more time than expected
- Time spent internally discussing what WANT (Dream Big)
- Implement at Affordable Cost

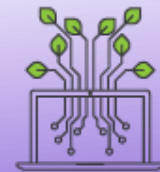


# Question

- Feel free to contact us:

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