

# Hiring and Training for Success With CiviCRM

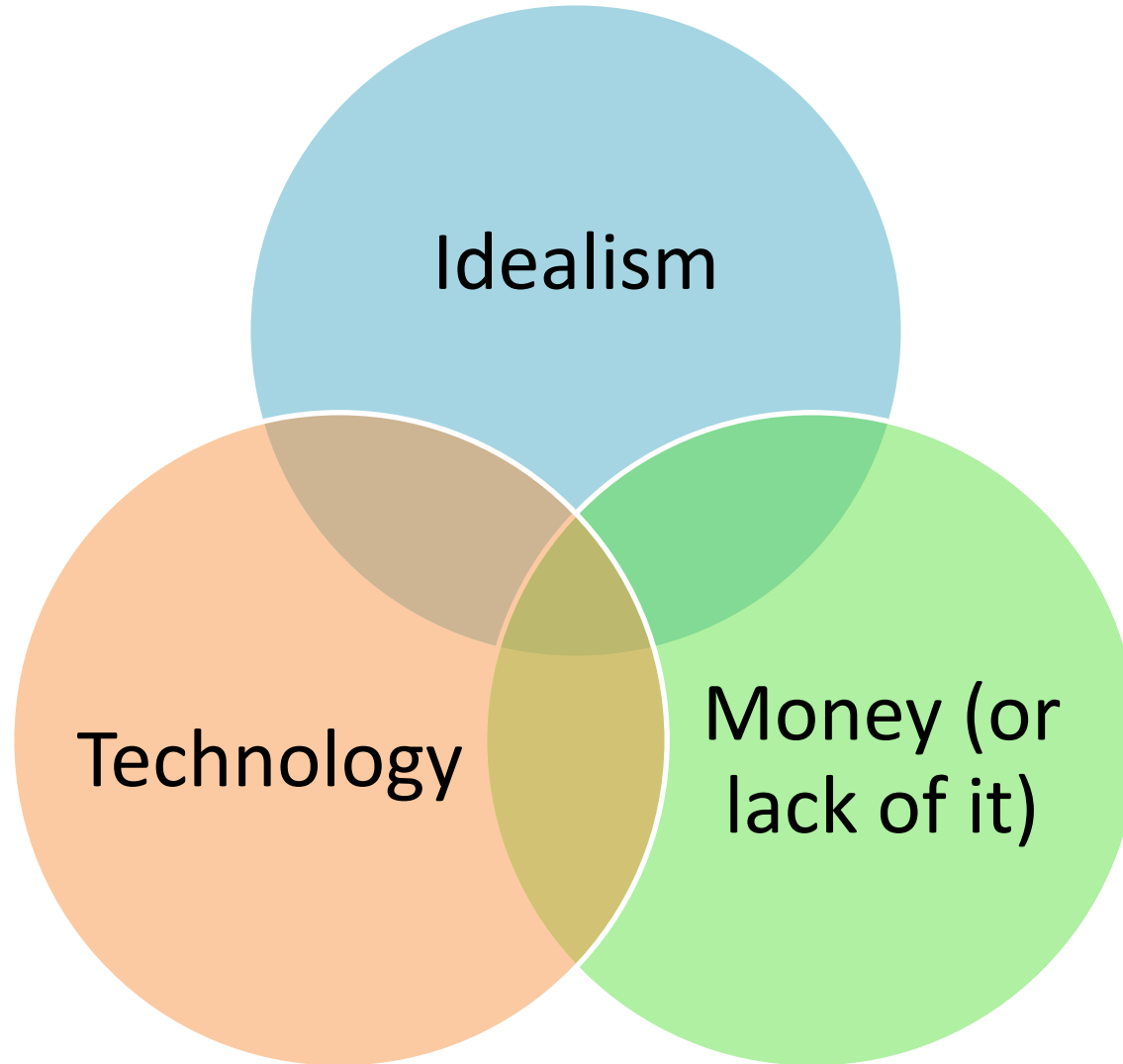
CiviCon 2015 Denver

Stuart of CiviTeacher.com

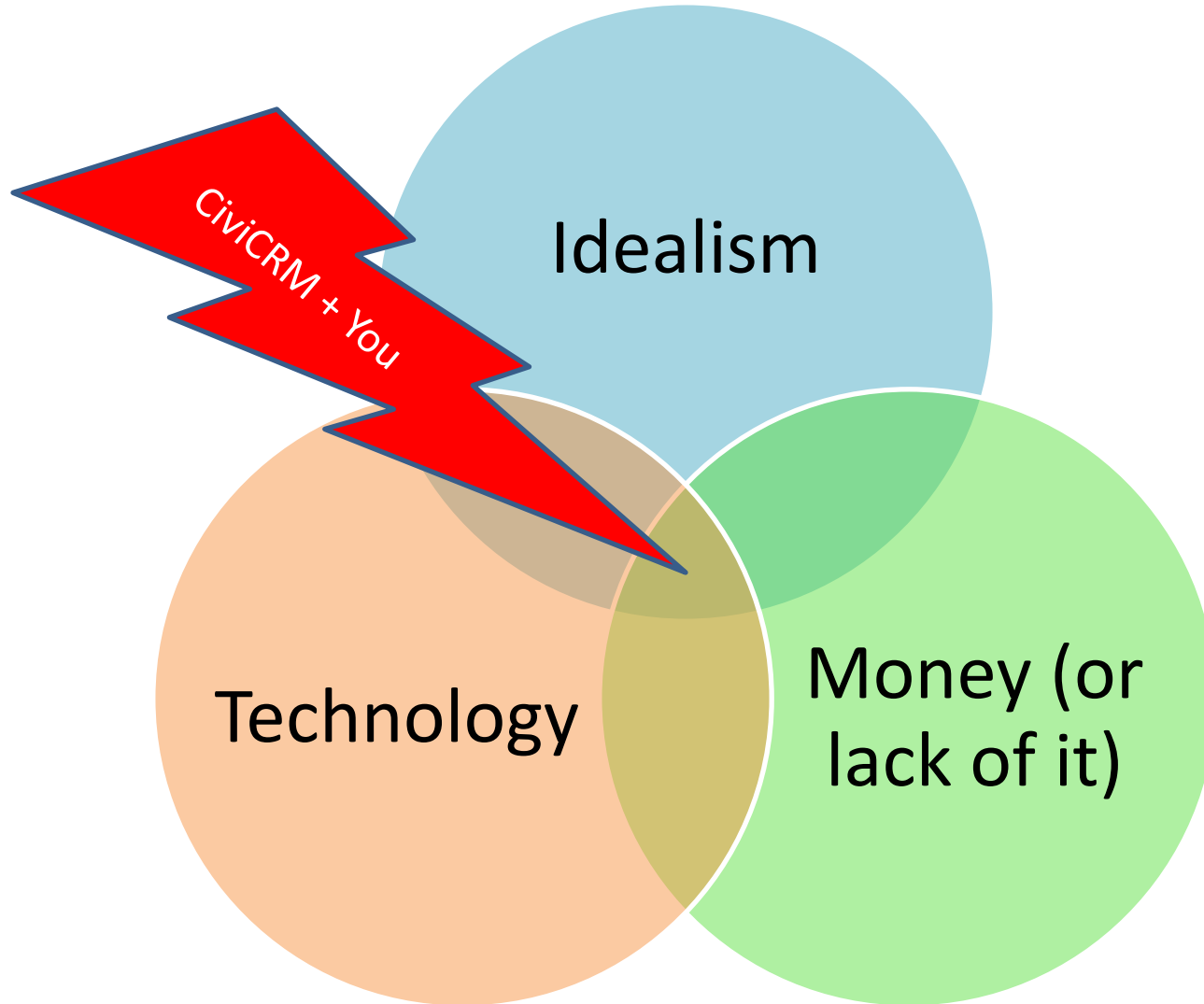
# Who Am I?

- Teacher for four years in the financial industry
- Seven years as a CiviCRM-centric consultant
- Twelve years in the nonprofit sector
- Seventeen years as a ‘web developer’
- Owner and operator of [CiviTeacher.com](http://CiviTeacher.com)
- Maintainer of approximately 50 active charities using Civi, most with budgets under \$250,000/yr

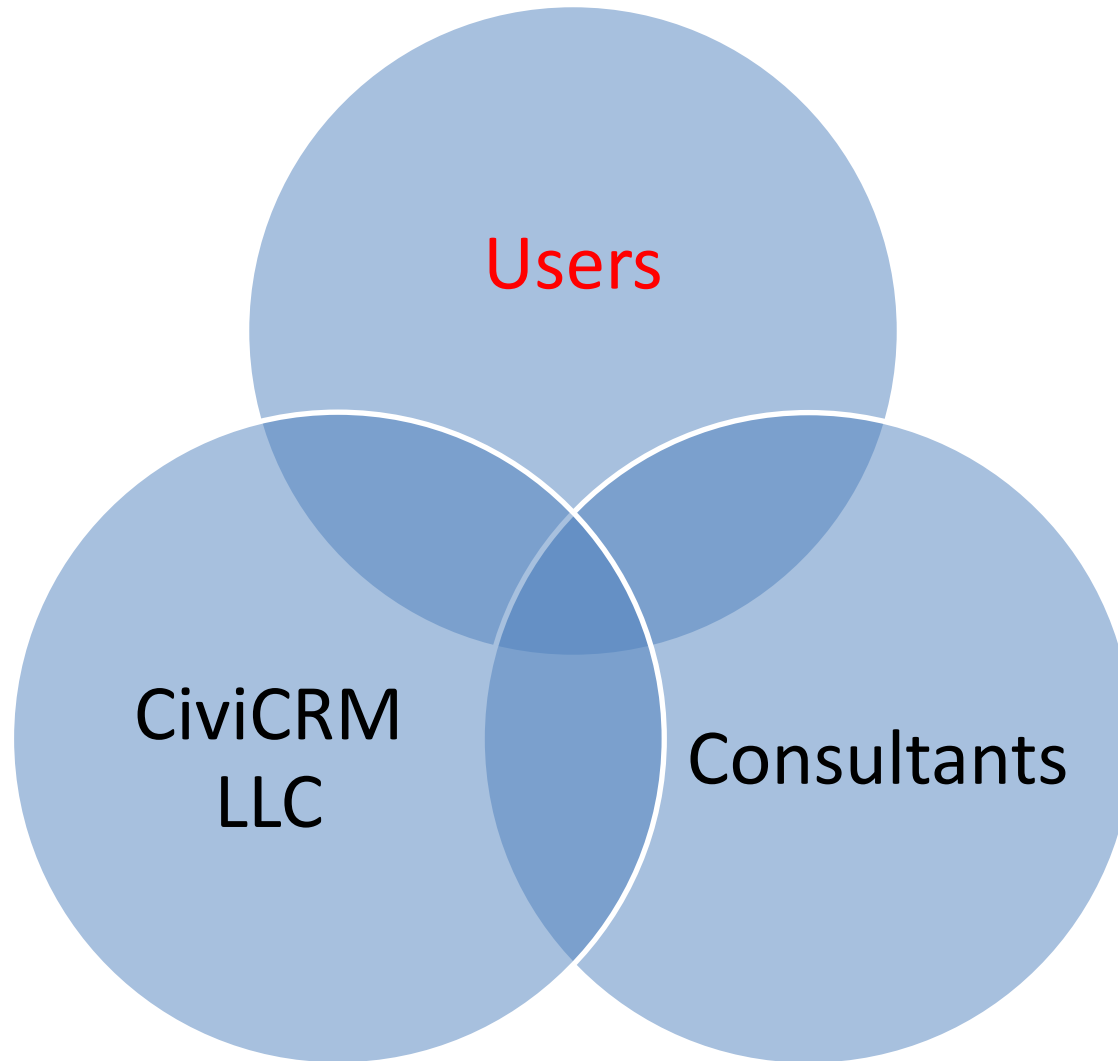
# The Ecosystem in Which We Live



# The Ecosystem in Which We Live



# Your Place in the Civi Community



# A (Not So Fictional) Tale of Two Departments

- Large nonprofit organization
- Same version of CiviCRM
- Same *kind* of data
- Same way of using that data
- Same consultant

One department is succeeding, the other is struggling. How? **Why?**

# The People



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Technology is a tool.  
People are the solution.  
Turnover is a problem.

## ...More Specifically

1. Hiring the right people
2. Training those people right
3. Making the right plan for your people now
4. Planning right now for the next generation of people

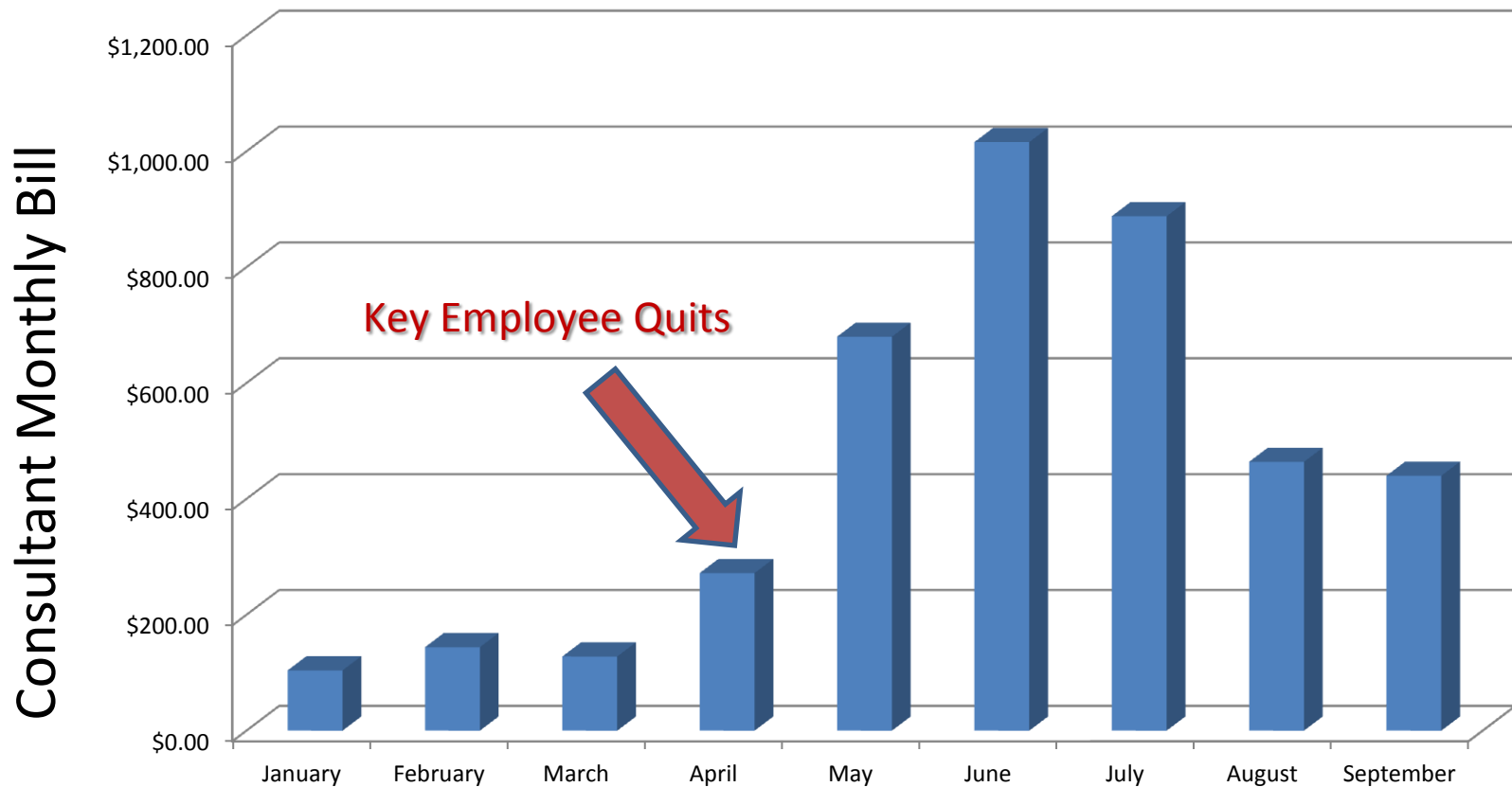


# What happened?

- Suddenly getting calls from staff members I've not met before
- Getting complaints the website “isn't working” and “can't *use* Civic-RM”, but nothing has changed that I know of
- There's talk of switching tools, people are emailing me Excel files of disconnected data
- “Where's Janet?” “Oh, she quit last month.”

# Big money is spent on training

- Whether you like it...or realize it...or not



# Forget About Our Sector a Minute

*What if* you owned...

- A nice restaurant
- An accounting office
- A hospital
- An electronics factory

Could *just anyone* work there?

Would you put them to work with **no training**?

# Why Do Nonprofits Struggle?

1. Money is always tight, so we improvise
2. Turnover is high (more later)
3. Sense of charity extends to the staff
4. Predetermination, idealism, overconfidence, naiveté and creativity abound

# Why Do Nonprofits Struggle With Technology?

- If your staff hates each other (or you), are lazy, mentally ill or corrupt...software won't fix that
- Technology doesn't solve people problems
- Software is a logical machine & lacks judgment
- Sense of entitlement: "We're good people doing good work, so getting what we want out of this computer shouldn't be that hard."

# Nonprofit Tech Spending

- [NTEN](#) did [a report on IT spending](#). Key points:
- Smaller organizations tend to spend % more
- All organizations tend to spend more on consultants (read: “renting knowledge”) than on software itself

My takeaway: Regardless of your nonprofit’s size or mission, increasing staff tech capacity should lower your costs and improve results

# Reality Check: Staffing for CRMs

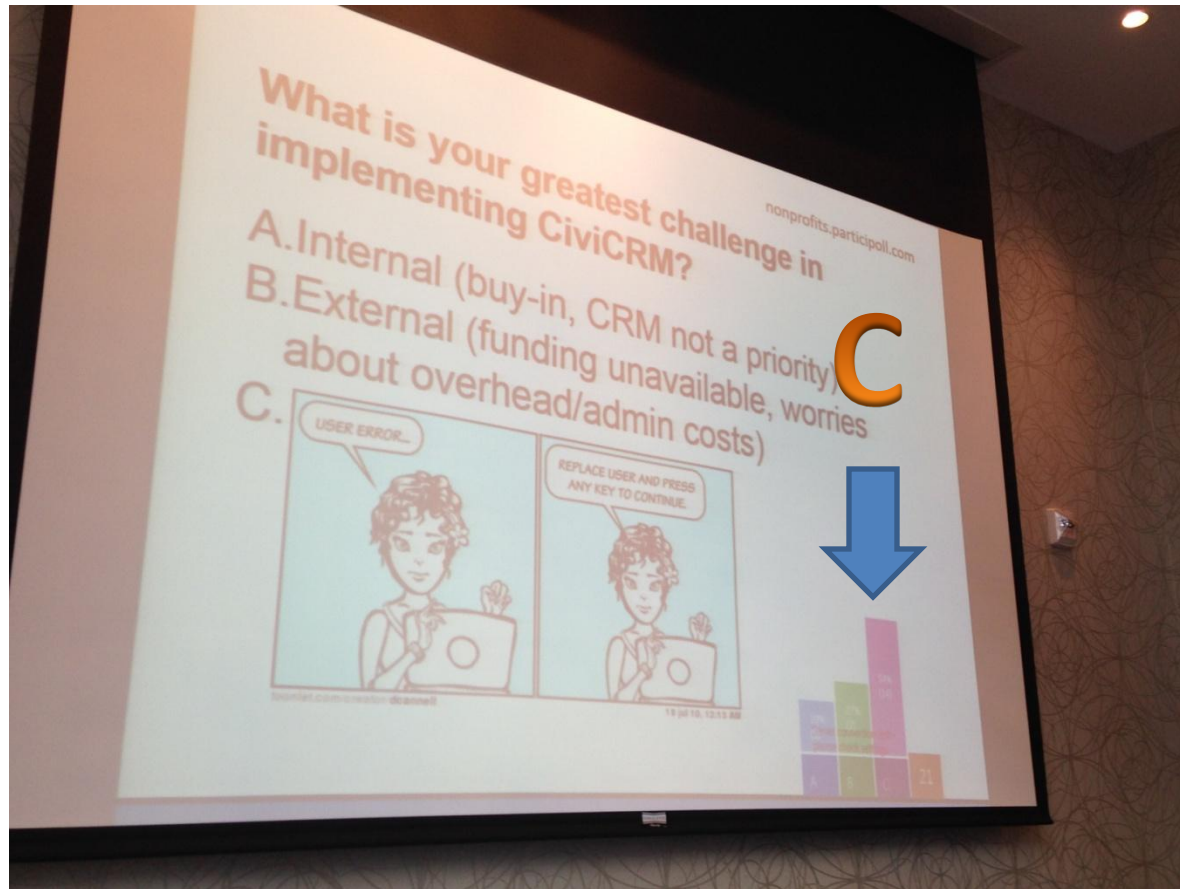
- Managing data, be it in Raiser's, CiviCRM, Salesforce or a bunch of file cabinets in the basement takes organization and discipline
- Everyone hates their CRM sometimes
- Working on a computer efficiently is a skill that a successful staffer must have *already*
- Using CRMs isn't the right job for everyone
- People don't like change

# Current Staffing Realities

- 20% of nonprofits report turnover as their biggest HR challenge yet 90% have no formal retention plan.
- **17% is the annual nonprofit turnover rate**
- Hiring new staff is now tied for popularity vs. reallocation of existing staff as a staffing strategy for new nonprofit initiatives
- Only 22% have any recruitment budget, and the most common hiring portal is Craigslist



# This Just In!



More than half say 'biggest challenge' is C: User error!

Source: Informal poll taken at User Summit 2014

I Asked for Quotes from Clients

**REAL TALKERS**  
**REAL PEOPLE**

# Bad Experiences

- “...I am the point-person for our database management” returning from maternity leave
- “...another staff member had taken it upon herself to import contact data”
- “...meant well and sincerely thought she knew what she was doing”
- 1500 duplicate records (most which were then thrown in the trash along with ‘real’ data)

# Preventing This

- “...**training more than one** staff person” [ed: redundancy and someone to check up on you]
- “...purchasing a book...a good consultant...**BEFORE** you make any major changes”
- Executive Directors should take the need for **training** and expert support seriously and build it **into the annual budget**”

# Bad Experiences

- Transition of capable staff person announced with 3 weeks notice
- No formal transition training scheduled, instead a director requests urgent estimate for new functionality
- New functionality request then put *on hold*
- Three weeks pass, new employee calls consultant for the first time and asks “how do I create a webpage?”

# Preventing This

- Schedule transition training **before old employee** leaves
- **Prioritize current workflow** maintainability before creating *new* workflows
- The hiring process should have discovered an employee capable of research and **self-identifying solutions**

# Hiring Tips from Real Users

- Someone who can “...think creatively, can implement a **plan B without freaking out**” and “Self-identify resources and solutions.”
- “Understanding the **core data principles** shared by many CRMs is important” [ed: relational data]
- “People who **understand** how **accurate data** contributes to their ability to do and evaluate their work”

# Hiring Tips from Real Users

- “...good **problem-solvers** and who are comfortable with technology”
- “...the person appreciates the purpose of CRM technology and is **good at parsing information**”
- “We ask ‘What is your favorite Excel trick?’ If the candidate does not have a good answer for that question, chances are she/he isn't ***right for the job.***”



# Training Tips from Real Users

- “...**task lists** for the various types of events we produce”
- “...each staff person to **document their own** regular interactions/processes”
- “...a sizeable **Civi manual** that is continually getting added to and updated. This manual was consolidated, **organized and reviewed** by *myself*...” [Ed: a ‘*natural*’]

# Training Tips from Real Users

- “...**key competencies** for working with the database **and a timeline** for ...a new employee”
- “We've found **repetition** to be the best in training.”
- “We get people started in Civi right away...”
- CiviCRM “...**doesn't require a lot of training**”

# Turnover Tips from Real Users

- “...we rely on having **multiple users** with expertise.”
- CiviCRM “...doesn't require a lot of training which **minimizes the impact of turnover.**”
- “We always try to **maintain at least 2 EXPERTS for Civi** at any time (one internal, one external consultant)”
- “After a staff turnover event, we often **re-visit** that particular person’s **role and procedures**”
- “CiviCRM is **easy** to use, teach...”

# Hiring Problems and Solutions #1

- **Problem:** People tend to hire those they can relate to, or more simply put, people like themselves.
- **Solution:** Recognize competencies and personalities that are not your own, and hire the best person for the job.

# Hiring Problems and Solutions #2

- **Problem:** A non-technical person often doesn't know the right questions to ask in a tech interview.
- **Solution:** Include technical people in the interview process. If you have none, find an unbiased friend or consultant.

# Hiring Problems and Solutions #3

- **Problem:** Deciding who does what job based on a stereotype.
- **Solution:** Place a bunch of people in the seat and watch for the best result. It may surprise you.

# Hiring Problems and Solutions #4

- **Problem:** Mistaking experience for the *right* experience.
- **Solution:** Hire based more on traits, less on experience. Experience with other software may be a hindrance, not an asset. Experience “fundraising” may not mean they understand how to use a computer.

# What **Good** Traits to Watch For

- Pattern recognition
- Attention span
- Congenial team-player
- Intelligence
- Good Judgment
- Organized
- Cool-headedness
- Cautious curiosity



# What to **Watch Out** For

- Their motives for volunteering
- Opinionated and non-adaptive (“My way!”)
- Excel addicts
- Inability to self-soothe (aka. “calm down”)
- Possessive or prideful (“I got this!”)
- Talk more than they listen
- Slow to connect the dots or recognize patterns
- You *already* have doubts they can do the job

# Categorize Your Staff

- **Regulars** – can get the hang of *regular tasks* with some practice.
- **Naturals** – you find them *figuring stuff out on their own* and helping others.
- **Tinkerers** – treat your database like a science project, coming up with *wacky new schemes*
- **Disasters** – never learn, constantly complain, and seem like they are *always screwing up*

# What to Do With Each Type

- **Regulars** – practice repetition for best results on common tasks. Let them *do what they're good at*, don't be afraid of reassignment
- **Naturals** – give a mentorship role, encourage them to suggest think independently. But... be mindful of their expanding role re: *turnover*.
- **Tinkerers** – listen but give measured response, weigh the cost vs. benefit of their ideas
- **Disasters** – restrict access (read only), exclude from decision-making, reassign or replace

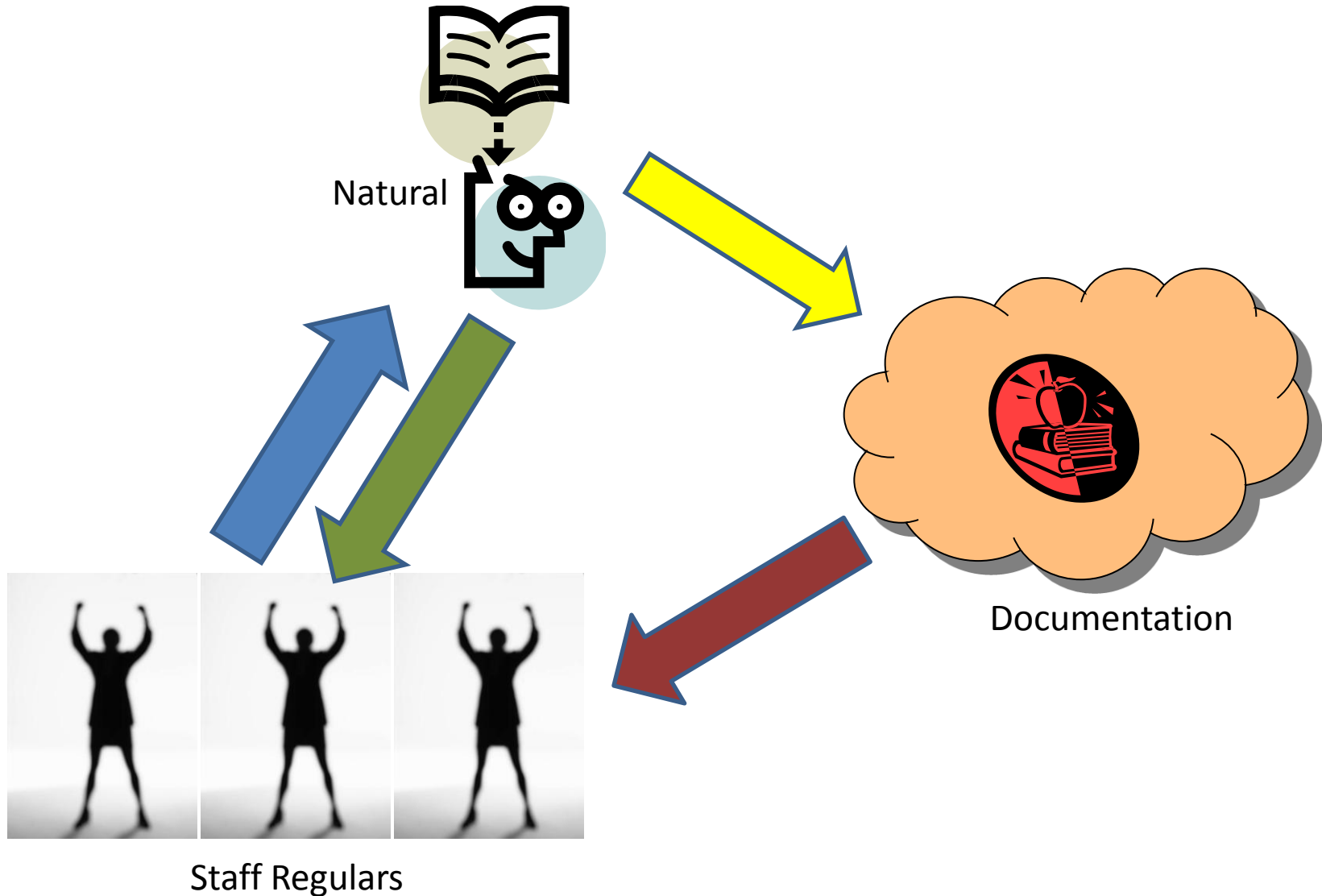
# The Most Successful Internal Training Systems I've Found Include...

- Involvement
- Oversight
- Accountability
- Availability

# Training

- Have people write their own workflows docs
- Place a 'natural' editor in charge of the project to offer feedback and organize the docs
- Cross-train people for the same task
- Consider discipline and consequences (gasp!)
- Place those resources in a format and location that staff can access easily on their own

# What Does That Look Like? (Using the Worst Clip Art Available)



# Escalation Points Are...

...where staff reach out for help before they screw something up. **It's different for every Org.**

- “Ask so-and-so about that before you do it.”
- “We need to have a meeting to discuss it.”
- “You should ask the consultant.”

**Usually when you do something new.**

Remember: not everyone has to know everything nor should be doing everything

# Available Resources

Resource	Cost	Format
<a href="http://book.civicrm.org">book.civicrm.org</a> created by a group of volunteers at various Civi sprints and conventions	Free	Online website Downloadable PDF Printed paper book
<a href="#">Using CiviCRM</a> Written by Joe Murray and Brian Shaugnessy, two experienced CiviCRM consultants	\$50	Paper book eBook
<a href="http://CiviTeacher.com">CiviTeacher.com</a> Videos developed by yours truly, and experienced CiviCRM consultant and teacher	\$15/mo	Online videos Subscription model
<a href="#">CiviCRM Cookbook</a> Written by Tony Horrocks, an experienced CiviCRM consultant	\$40	Paper book eBook



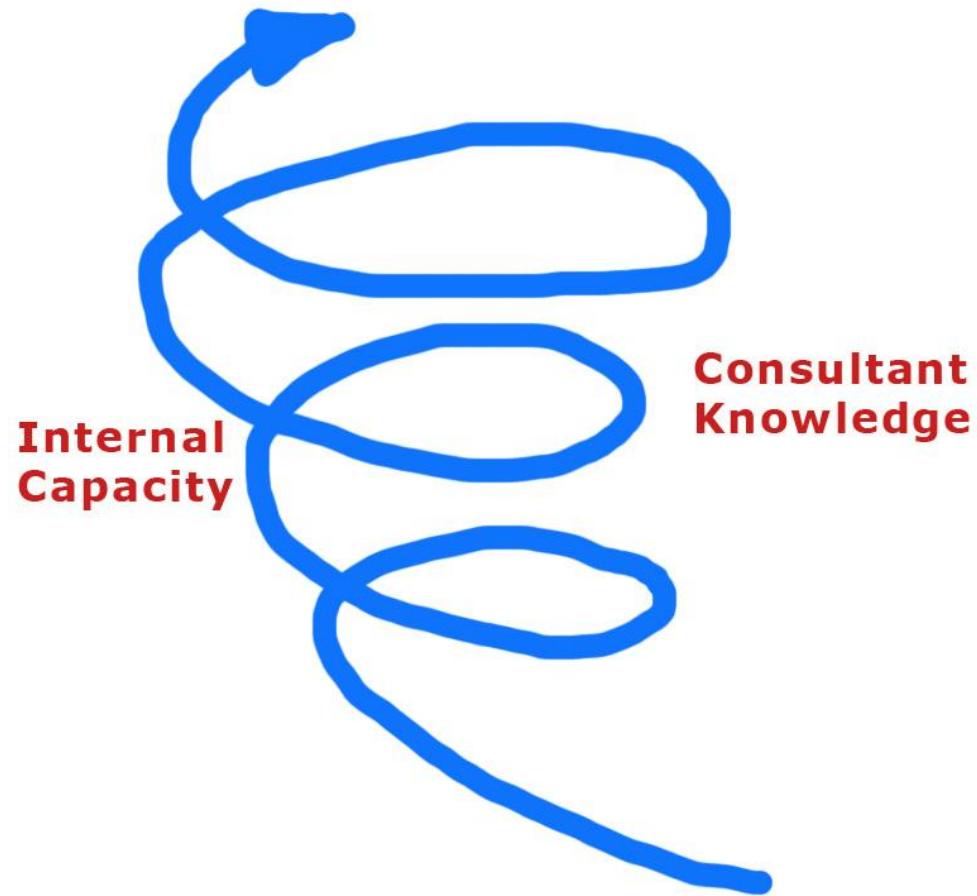
# Available Resources

Resource	Cost	Format
<a href="#">Webinars</a> Produced by volunteers to introduce and discuss CiviCRM	Free	Online meeting
<a href="#">The Forums</a> Online free-for-all discussion where n00bz, core team, consultants and hacks meet and get real	Karma	Online website
<a href="#">Local Meetups</a> Watch for CiviCRM meetings in your area, produced by a wide variety of organizations with a multitude of styles	Free	In person meeting
<a href="#">CiviCRM In-person Trainings</a> Training seminars (usually one or two days) produced by local outfits worldwide	\$100-\$600	In person meeting

# Working With Consultants

- Much like a lawyer, you shouldn't make an important move without consulting him/her, but the quickest way to bankruptcy is to ask your lawyer every little question on your mind
- You will probably always need a consultant
- A good relationship with a consultant is maintained over time, where both of you are accountable for your continued success

# The Upward Spiral of Consultancy



# What the Future Holds

- **In five years, 80% of the people you work with will be gone (and maybe you too!)**
- The software you use will likely be obsolete, unsupported, sold out or bankrupt
- Demand for your organization's mission will be higher, but your staff will be the same size
- Your budget will be virtually unchanged

# Rising to this Challenge Takes

- Leadership
  - Asking a lot of open ended questions (Why?)
  - Developing a *vision*
  - Aligning people
- Management
  - Asking a lot of closed-end questions (How much?)
  - Planning and accountability
  - Effective use of resources

# Hiring and Training Plan to Succeed

- Adaptability is key (open source allows this)
- Develop rugged, sustainable, transferrable workflows
- Remain true to **your organization's vision**
- Offer bossy stakeholders knowledge. They feel out of control.
- Do your best to find and then ***keep*** the right ***people*** for the job

# Hard Questions to Ask Yourself

- Are you making short-sighted decisions based on fads, “shiny object syndrome”, or pandering to quarterly demands?
- Are you biting off more than you can chew? Have you thought about the cost of ongoing support and *training*? Do your vendors care?
- Are you spending money to accommodate the wants of the “squeaky wheel” who will probably quit soon (or should be fired)?

Would you accept \$10,000 to put a pear tree in your rose garden?



**Saying 'no'** is one of the hardest things you'll ever do...but how else can you stay true to your vision?



# Getting Respect Starts With Giving Respect

- Even powerful and generous people (e.g. board members) need expectations set
- Remember: being **respectful** of someone's time means establishing an agreement on the terms of their involvement.
- When you respect their money and time, they will respect you and your vision

Good luck!

Question time...

**CiviTeacher**