

# Case Study:

## Can:Do Group CRM procurement

### Client Relationship Management software procurement - 2021/22

#### Introduction

In May 2021, Sonya Weiser of Wiser Technology Advice was approached by Alison Gallo, Executive General Manager, Can:Do Group Corporate Services.



Sonya was recommended to Can:Do Group by the Executive Manager, Community Services of the Royal Society for the Blind, as a suitable person to provide advice on how to start the process on replacing client relationship management (CRM) software, and to provide general guidance on how to move forward.

Can:Do Group is a South Australian not-for-profit organisation which provides support and assistance to children and adults who are deaf, hard of hearing, blind or have low vision.

#### The problem facing Can:Do Group



Can:Do Group had commenced a systems review project, with the initial driver for this project being replacement of the CRM system used to manage national disability insurance scheme (NDIS) service delivery.

Detailed requirements for the CRM system had been documented, but the next step of finding a suitable software vendor had not commenced. Engaging with software vendors can be overwhelming, with each vendor's sales team providing convincing reasons why theirs is the best software system.

The executive team of Can:Do wished to engage an independent advisor to assist them along the journey of vendor selection. The intention of this was to ensure the organisation received not only the system it needed to meet requirements, but selected the software vendor who provides the best support through implementation and ongoing use of the new system.

Sonya Weiser of Wiser Technology Advice was engaged to ensure good governance throughout the CRM software procurement process.

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### How Wiser Technology Advice helped



We provided software system procurement services to Can:Do Group, from stakeholder engagement, analysis of needs and vendor selection through to approval of a business case by the Can:Do Group board.

Here's a summary of what we did to help Can:Do Group:

- In June 2021 we facilitated a workshop to analyse the current business processes, discuss issues and ideas arise from the current CRM, analyse data flows and prioritise requirements for a new CRM. The workshop was attended by operational staff and management of Can:Do Group, including the CEO, executive managers, team leaders, key administrative staff and therapists.
- We provided Can:Do with a report documenting the outcomes of the workshop, including the business process and data flow diagrams developed during the workshop, the issues discussed and the prioritised requirements in particular for reporting form a new CRM. This report was finalised in July 2021.
- A request for proposal document was then developed, based on the requirements for CRM software that had previously been documented by Can:Do and the further information provided in the workshop.
- Wiser Technology Advice approached five software vendors on behalf of Can:Do in August 2021, presenting them with the Request for Proposal document and a Word document template for their response.
- Once responses from vendors were received in September 2021, we provided the Can:Do evaluation team with a vendor scoring spreadsheet, enabling fair comparisons of how vendors responded and how well the requirements could be fulfilled by their software systems.
- In October 2021 the evaluation team met and agreed on consensus scoring for the vendor responses. The outcome of this was that two vendors and their CRM software systems were short-listed.
- We conducted reference checks, speaking to current customers of the vendors. The clear leader from this process was Social Solutions. The Penelope CRM is trusted and recommended by other not-for-profit organisations based in South Australia.
- Both the short-listed vendors provided multiple demonstrations of their software to the Can:Do Group evaluation team in November 2021.
- Our vendor evaluation report was provided to Can:Do Group's executive management team on 1 December 2021. This report set out the procurement governance processes that we facilitated, scores by the evaluation team, and the

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recommendation from the evaluation team that Penelope CRM by Social Solutions be considered, with the other short-listed system as a possible alternative.

- A business case was also prepared for consideration by the board of Can:Do Group. This set out three options: 1) the ‘do nothing’ base case, setting out the critical business risks faced in the current situation 2) the preferred option of implementing Penelope CRM and 3) the alternative option of implementing the other short-listed system.
- On 20 December 2021 the Can:Do Group board approved the business case recommendation of proceeding to negotiations with Social Solutions for implementation of their Penelope CRM.
- In January 2022 we assisted Can:Do Group with selection of a candidate for a new Program Manager role, to guide the organisation through the CRM implementation project.
- On 26 April 2022 Social Solutions was engaged by Can:Do Group and the project to implement the Penelope CRM system commenced.

### In Alison’s own words



We asked Alison Gallo, Executive General Manager, Can:Do Group Corporate Services, to provide us with feedback. Here’s how she responded:

“The Can:Do Group engaged Sonya Weiser to assist with the analysis of our system requirements and selection of a CRM that would best suit the needs of our NDIS services. The process mapping phase was critical to ensuring we could accurately define our requirements and Sonya facilitated a workshop to seek input from across the business and prepared procurement documentation that clearly articulated these requirements. Sonya’s guidance and attention to detail throughout the evaluation phase was invaluable and we particularly appreciated her independence and technical expertise. Having Sonya on board throughout the process clarified and streamlined what can be a complex and daunting journey, placing us in a strong position from which to commence implementation. We highly recommend Sonya for her professionalism and practical advice.”