Centralizing our Information

The ABC’s of CRM at PWN

What is happening?

- PWN's primary work is about building relationships

What is happening?

- PWN's primary work is about building relationships

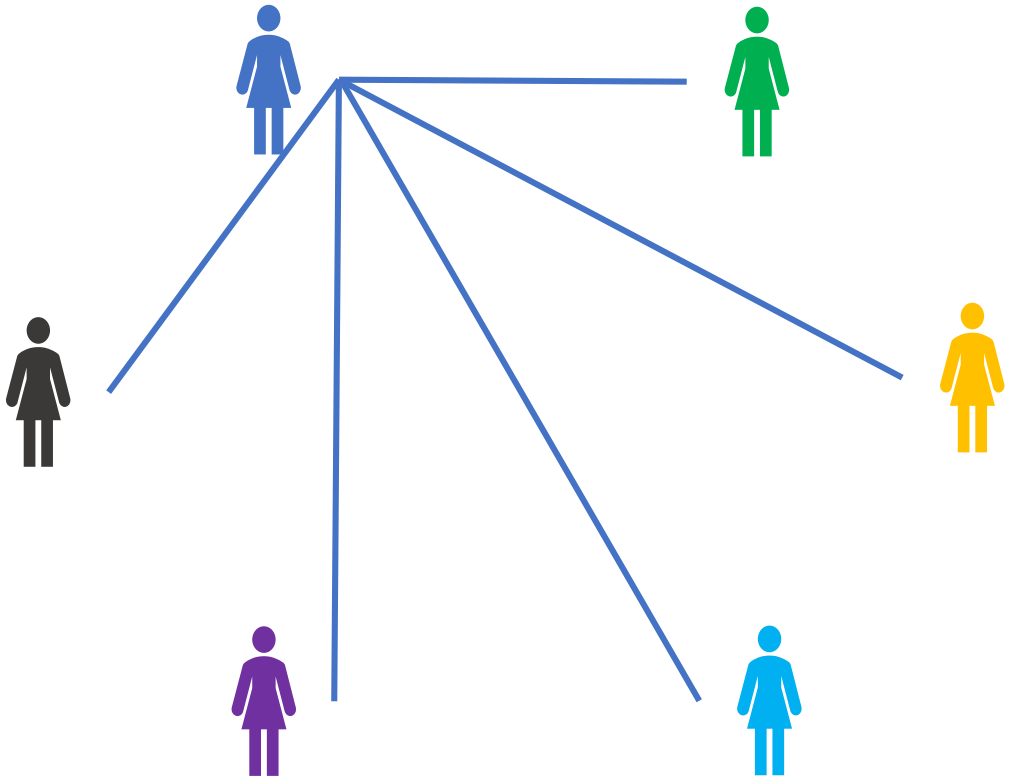
- We need to keep track of relationships to do our work.

What is happening?

- As we grow, the number of relationships grows faster

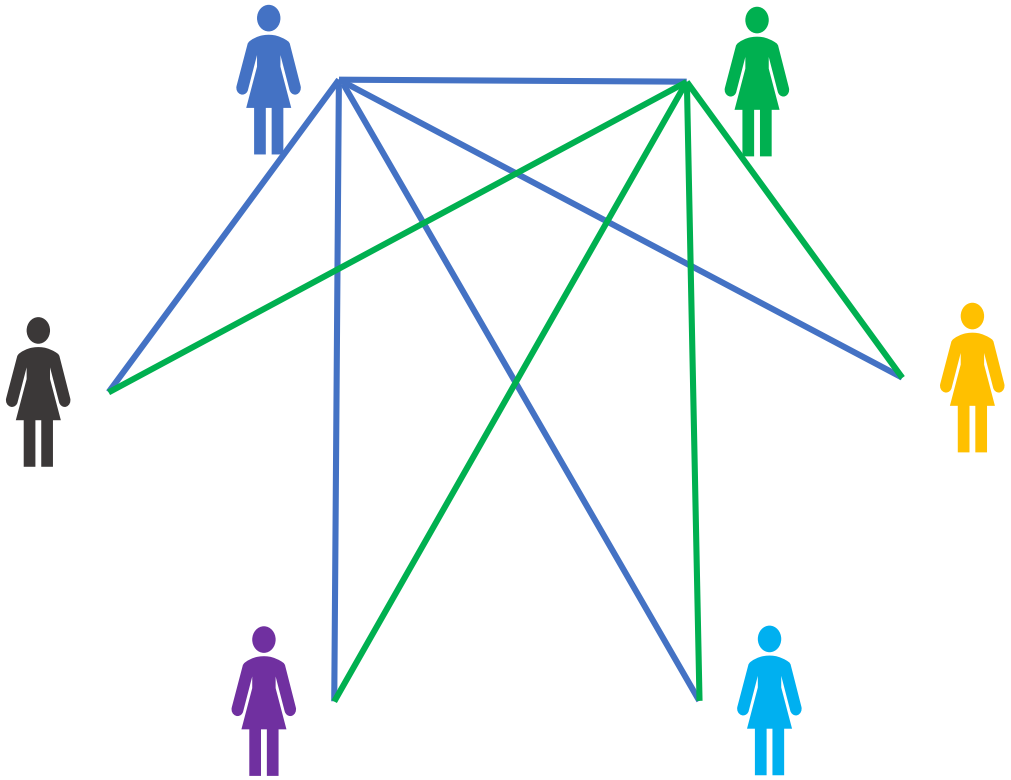
What is happening?

- As we grow, the number of relationships grows faster



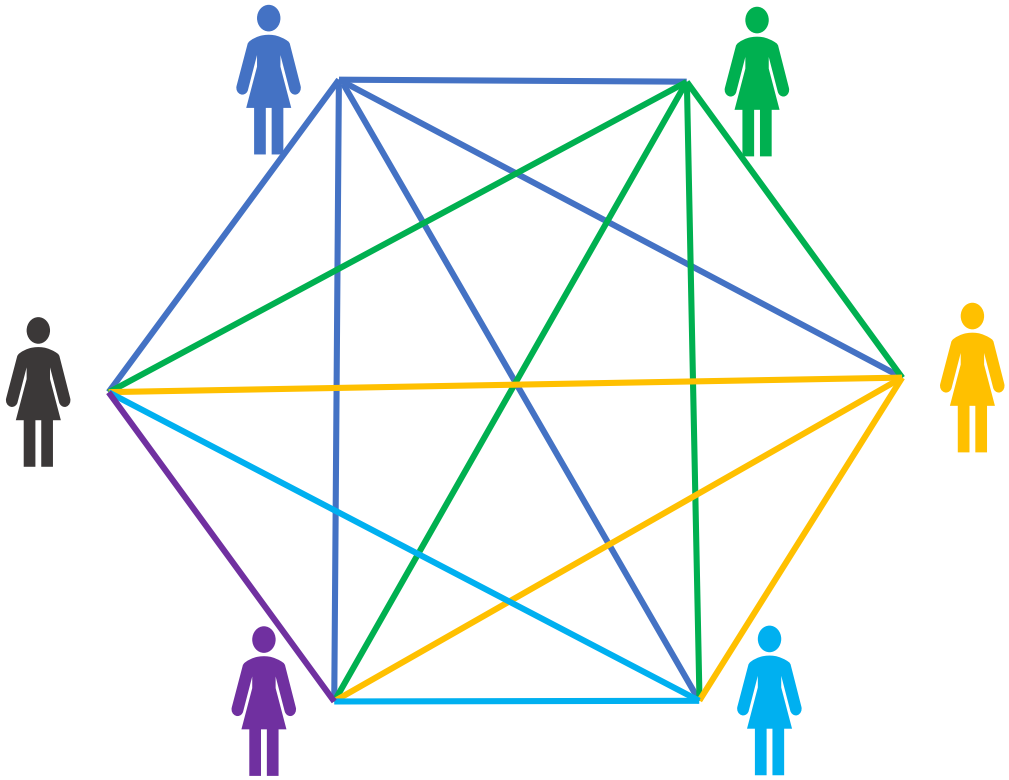
What is happening?

- As we grow, the number of relationships grows faster



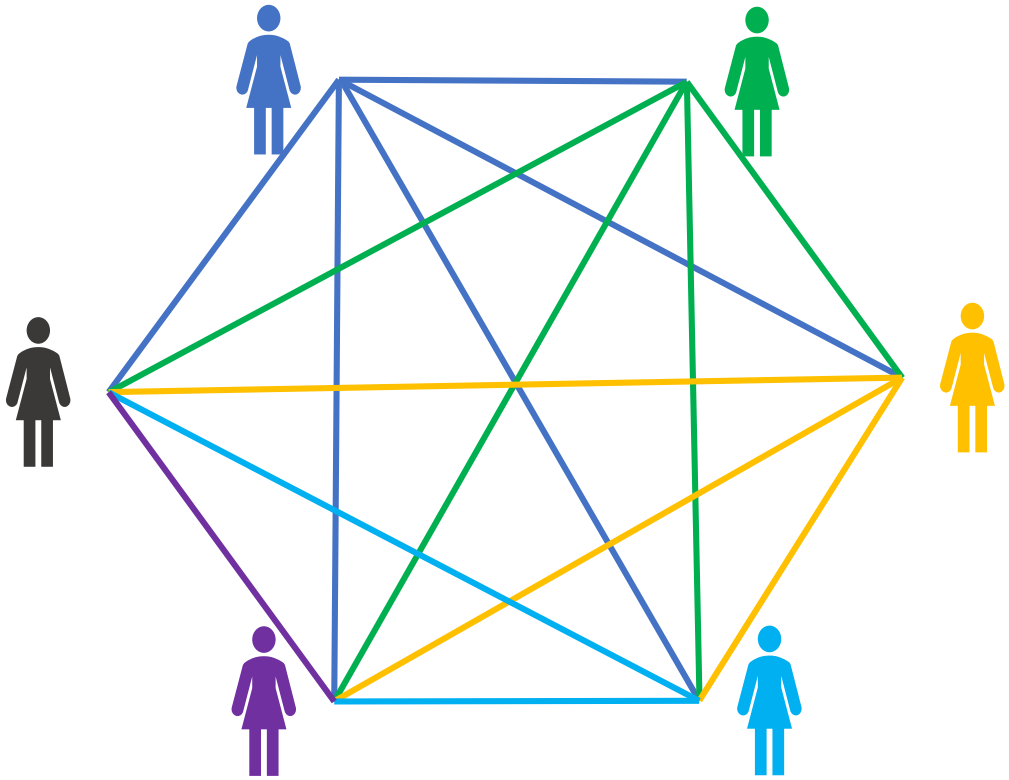
What is happening?

- As we grow, the number of relationships grows faster



What is happening?

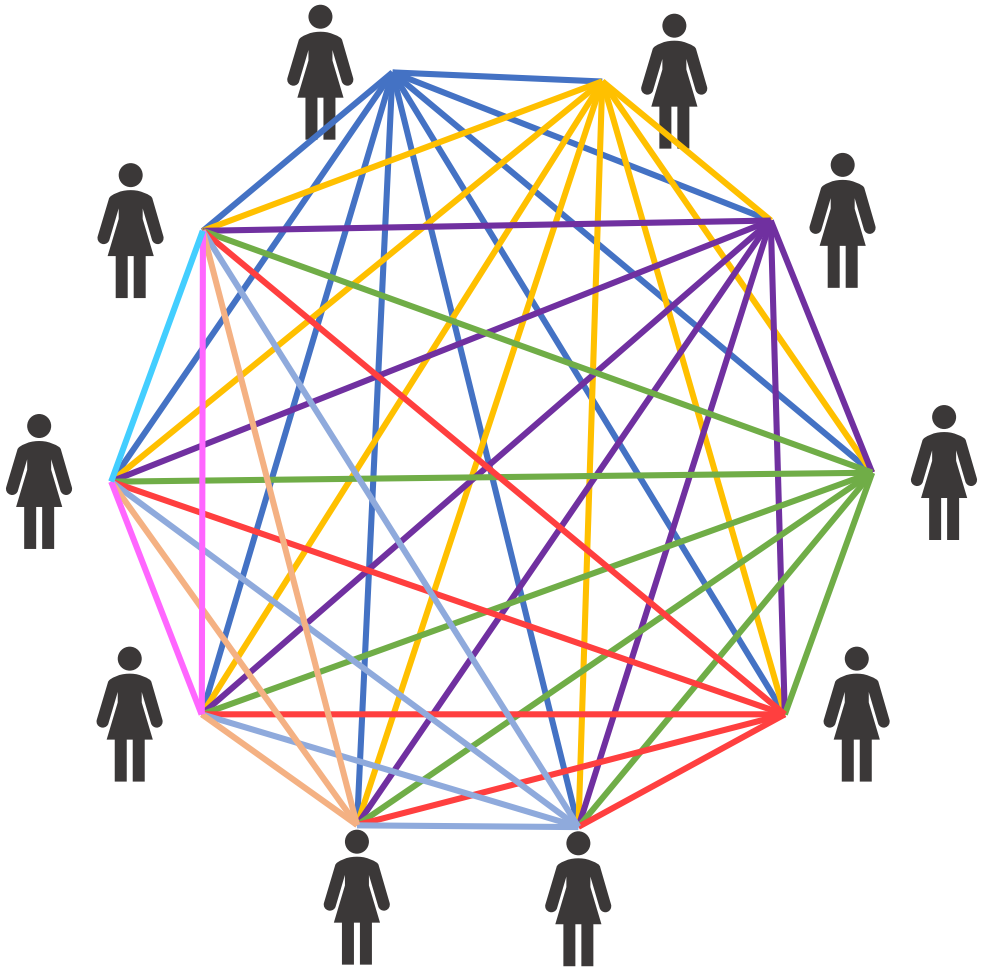
- As we grow, the number of relationships grows faster



- **6** people
- **15** pairs
- **64** total relationships

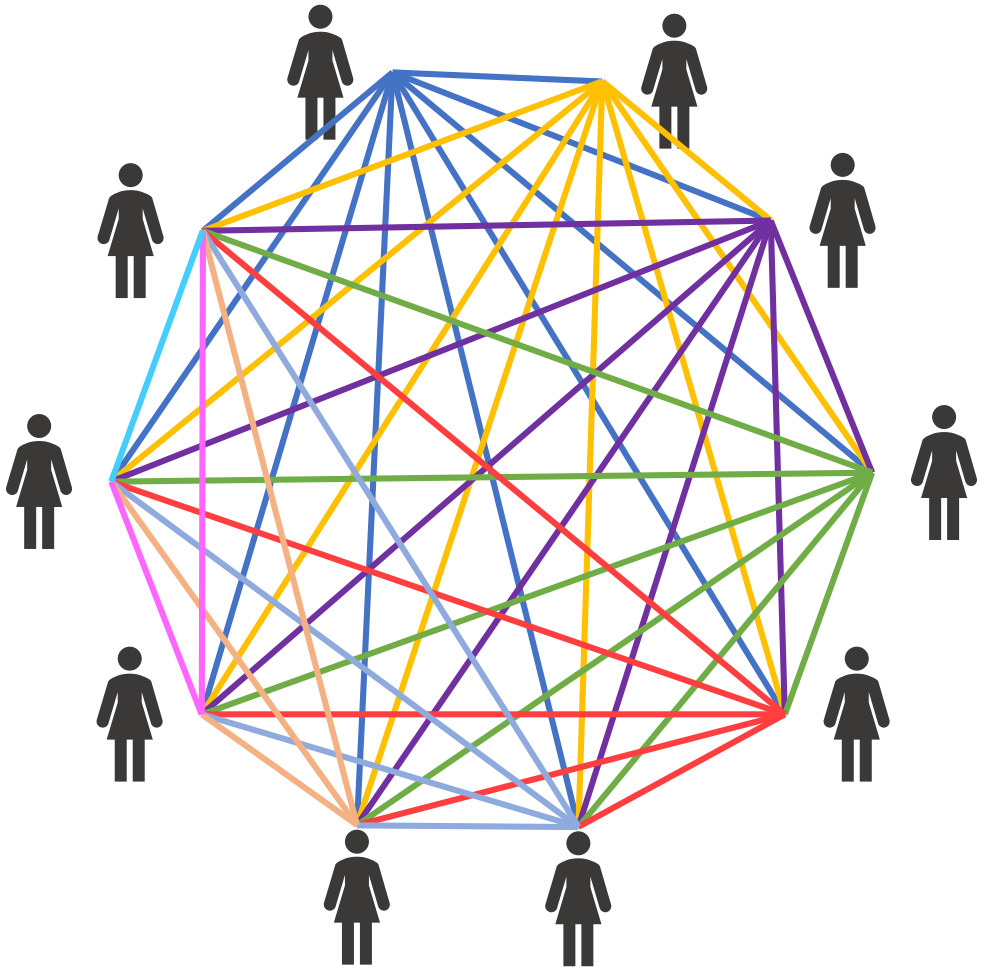
What is happening?

- As we grow, the number of relationships grows faster



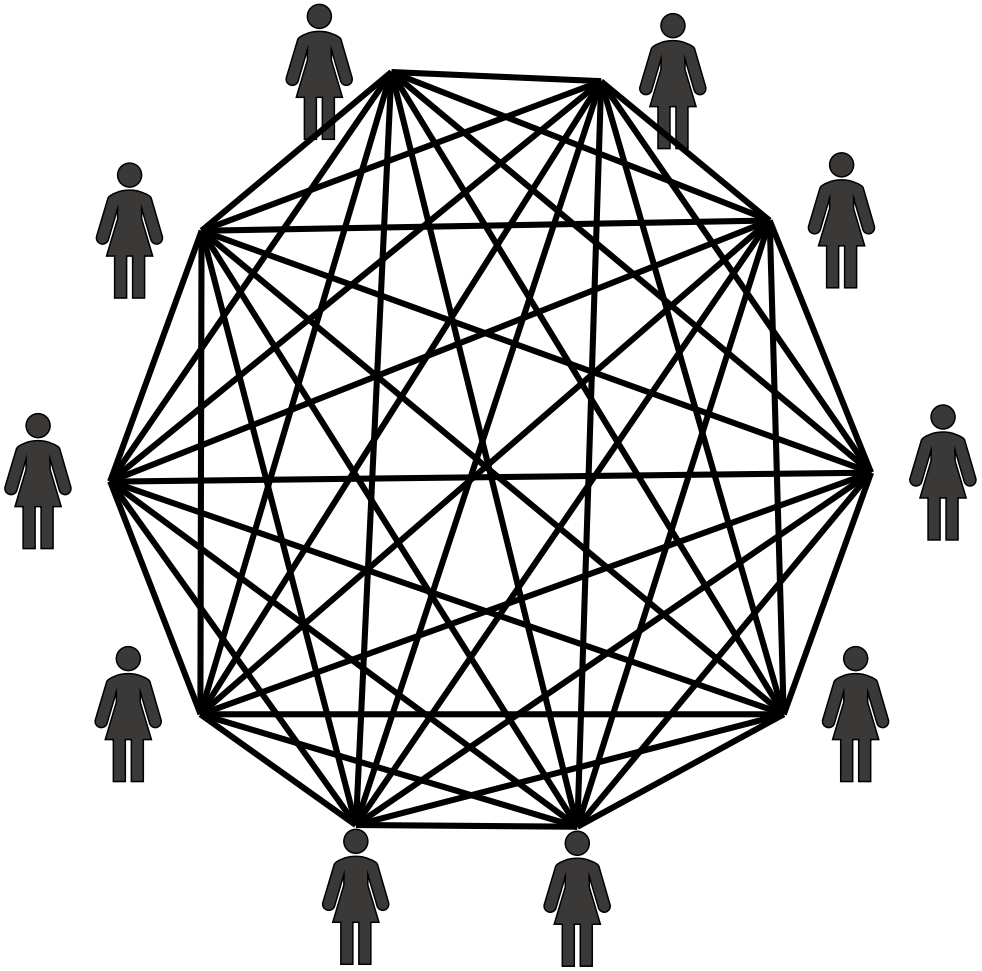
What is happening?

- As we grow, the number of relationships grows faster



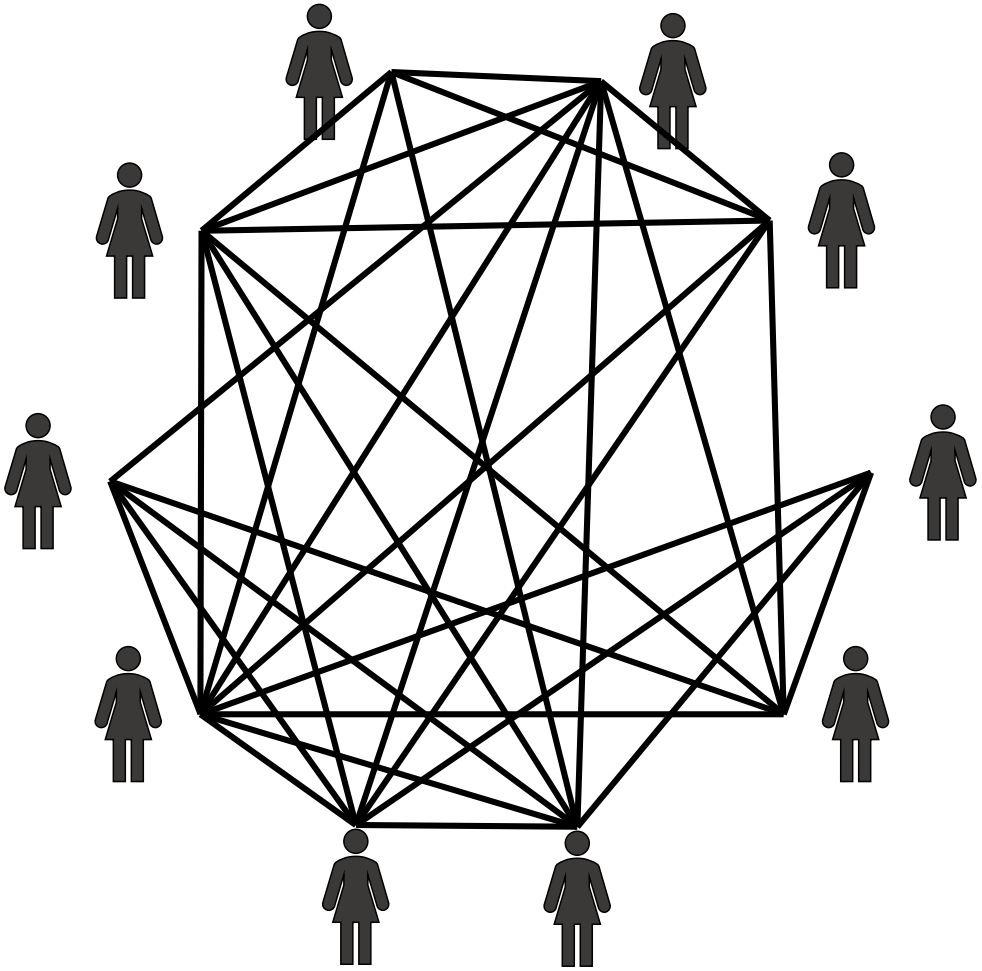
- **10** people
- **45** pairs
- **1024** total relationships

So what?



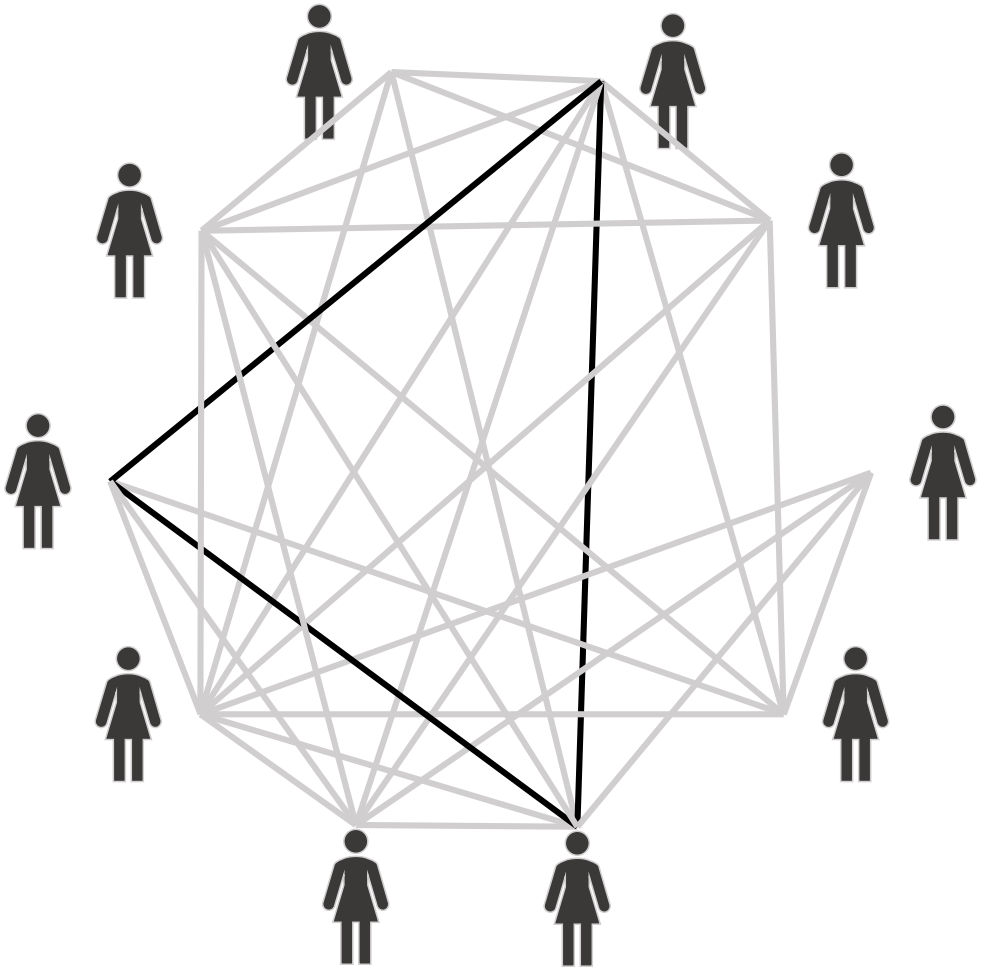
- Harder for any 1 person to know everyone

So what?



- Harder for any 1 person to know everyone
- Mathematically impossible for *everyone* to know everyone (limitation of time)

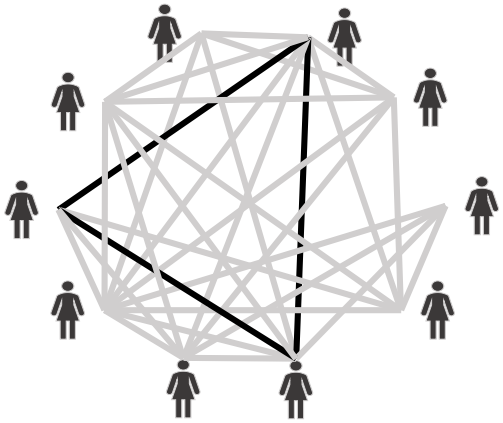
So what?



- Keeping track of basic information (name, phone, email) becomes more unwieldy
- We want to know more details, too
- And know about individuals *and sub-groups*

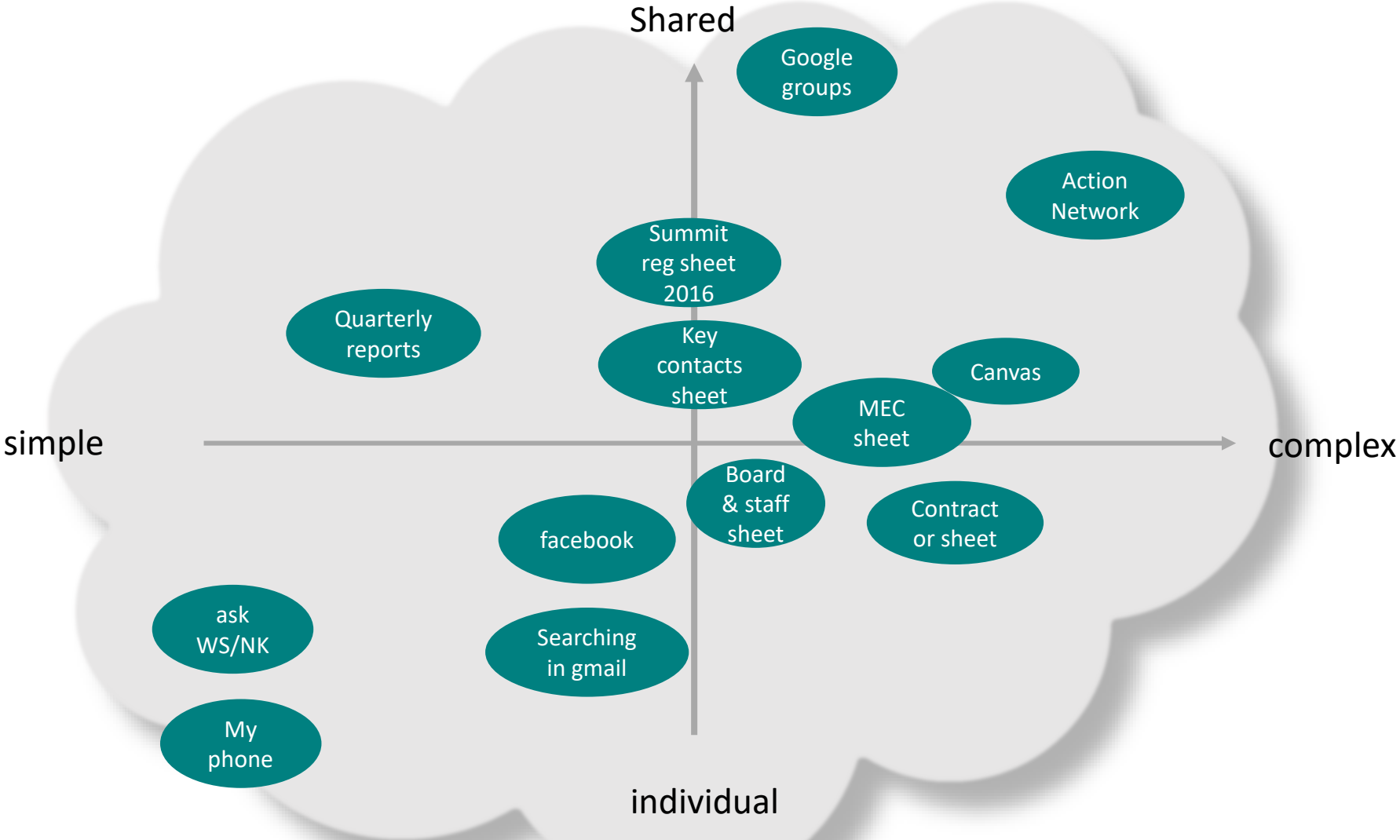
What's happening at PWN?

- Different people want to know and do different things with different subsets of this information
  - And are therefore using different methods across multiple, incomplete sets of information



How is this happening?

- With great variation!



Challenges/Limitations

- **Lag times**: Different data sources are updated at different times, and piece-by-piece
- **Authority control**: which one is the right email address for person x?? Who is a member???
- **Generating sub-lists**: time-consuming, prone to human error, inconsisent
- **Loss risk**: someone accidentally deletes or edits a sheet they shouldn’t

Who wants to know what about whom?

Department	Stakeholder information

Organizing	• Member contact info (phone, email, mailing address)
	• Member PWN affiliations
	  • Chapter member? Chapter officer? State lead? Summit presenter? Summit attendee?
	• Member organizing activities
	  • E.g, attended POD call on x date, bird-dogged congressperson on y date, signed petition on z date

Policy	• Records of one-off research support to members • Member engagement in campaigns
Comms	• Member contact info & engagement with emails, webinars, & calls • Base, Allies, Donors contact info & email engagement • Segmented lists for emails • Member photos for use in marketing

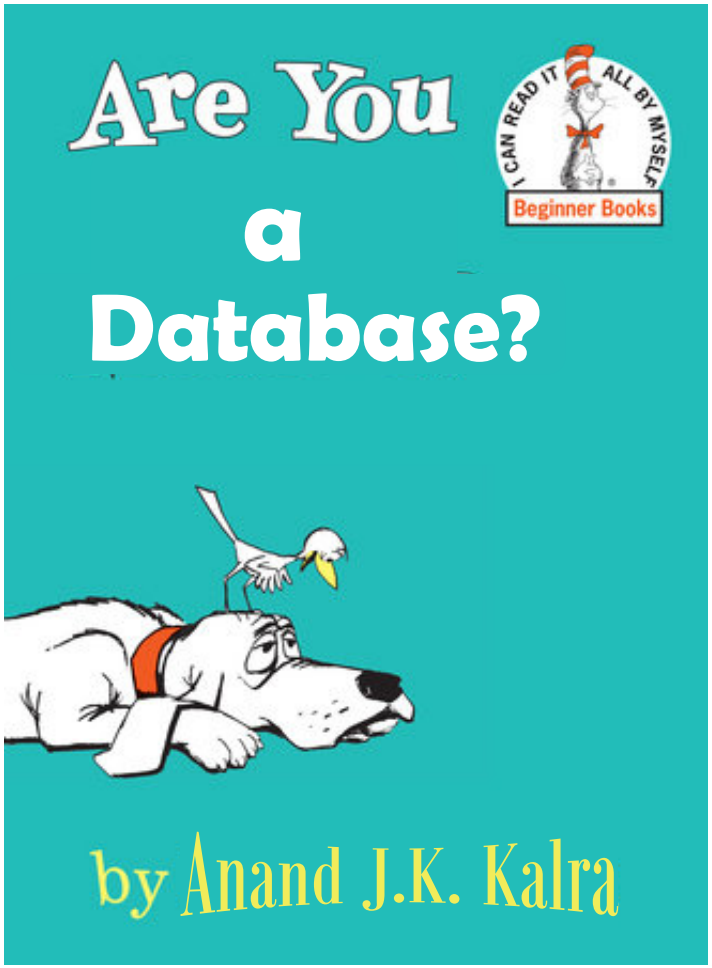
Admin/Exec	• Staff & board contact, travel & food info
	  • Emergency contacts
	• Contractor contact info
	  • Plus documents (e.g., W9's, invoices, contracts) & contract info
	• Funder contact info
	  • Tied to grant info, incl deadlines & documents
	• Donor contact info & donation history

Moving to Solutions

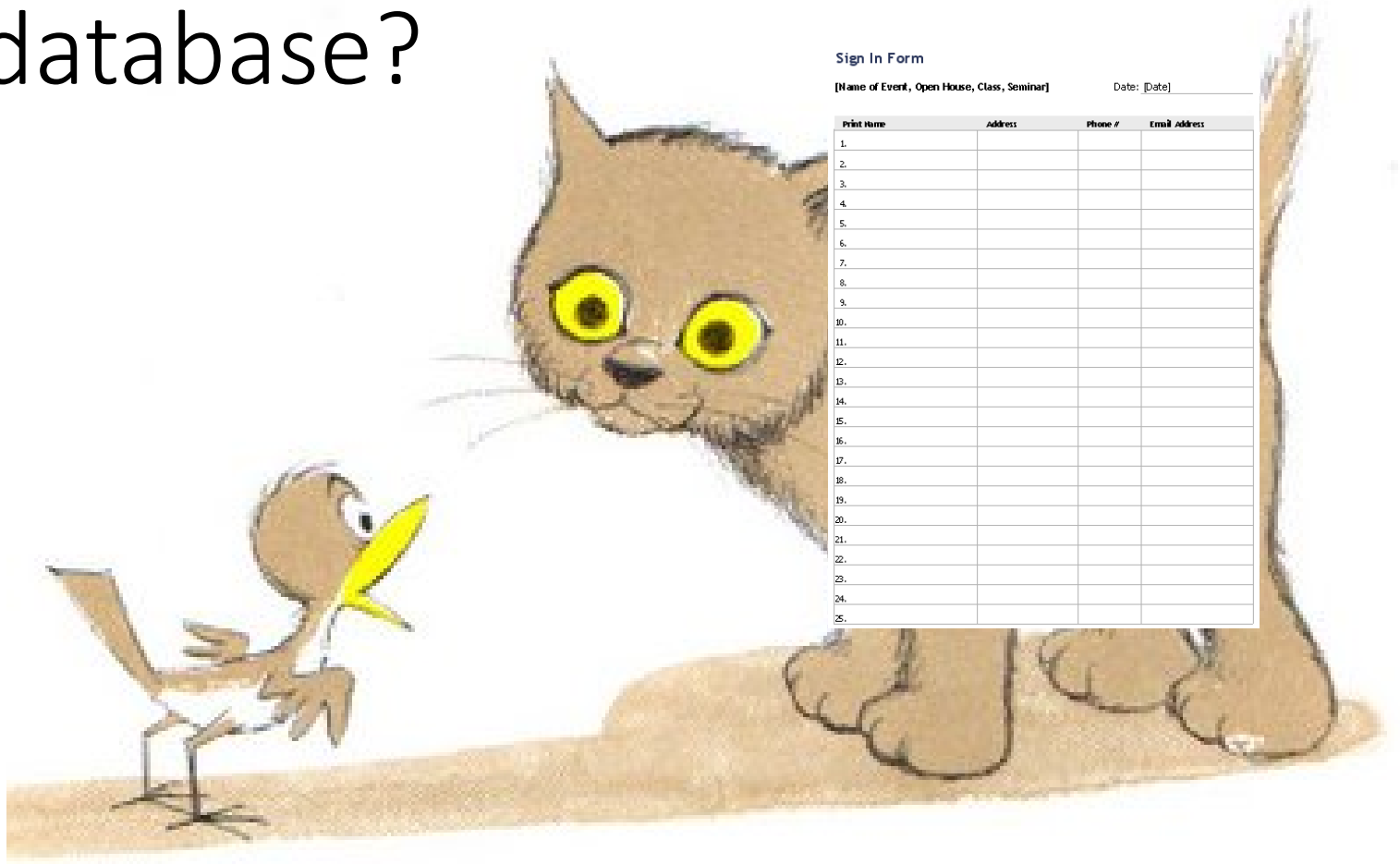
- **C**ustomer **R**ecords **M**anagement Database (CRM)
  - Can do basically anything
  - But require time & expertise to set things up *and maintain*
  - So we can't do everything
    - (sorry, ENFPs)
  - We need to narrow to our **main priorities**

How can one database do all that?

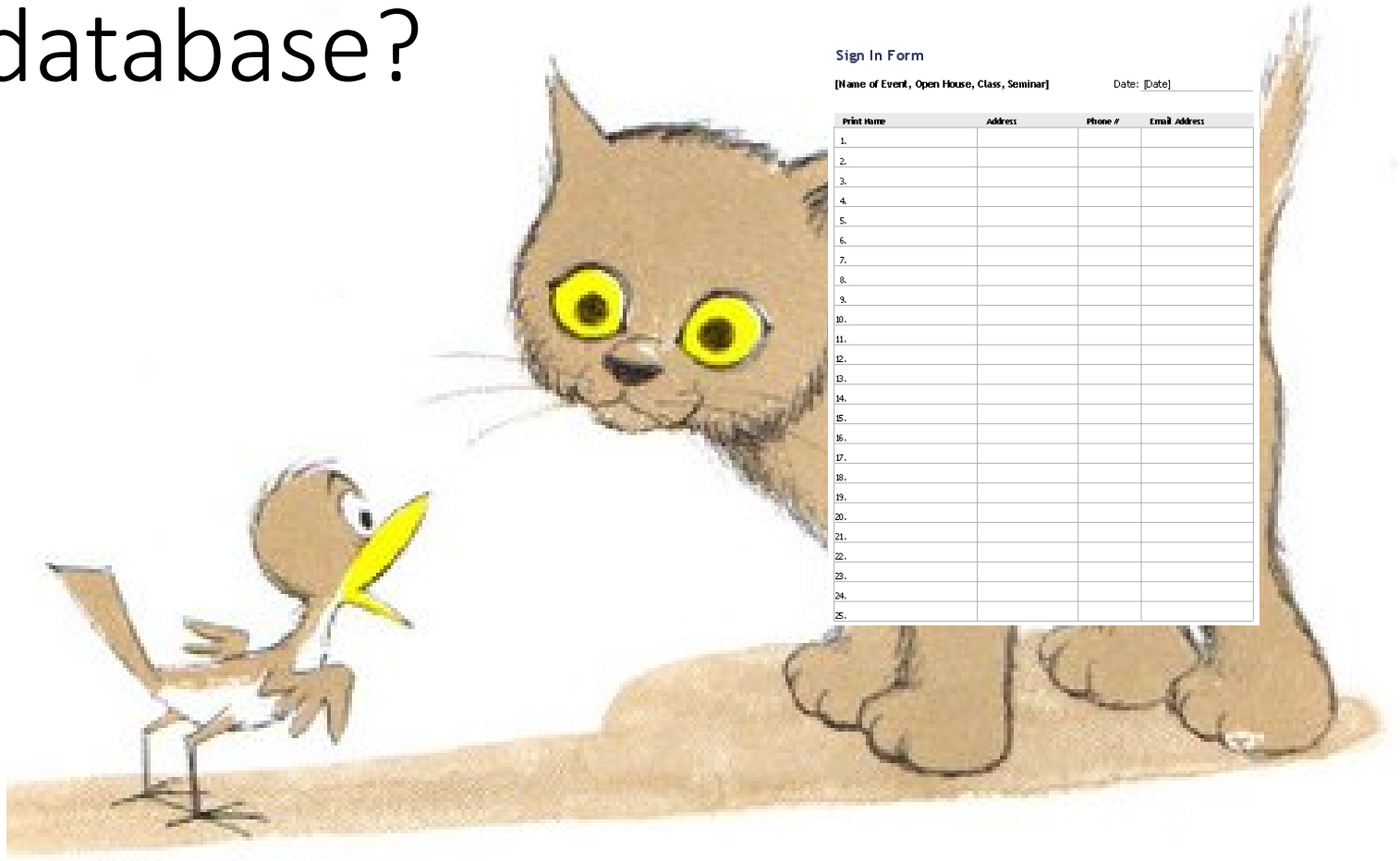
How can one database do all that?



Printed-out Sign-in sheet, are you a database?

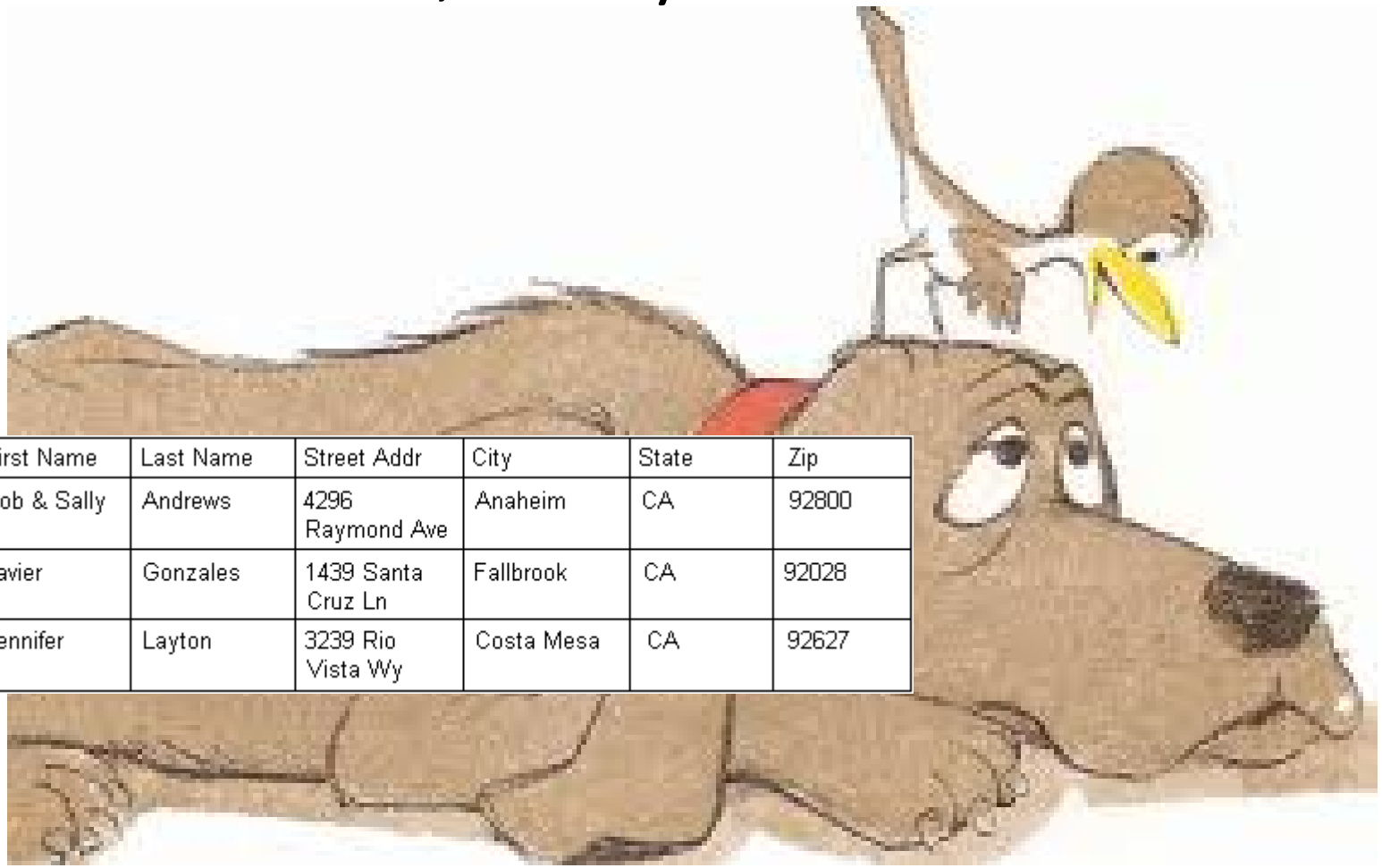


Printed-out Sign-in sheet, are you a database?



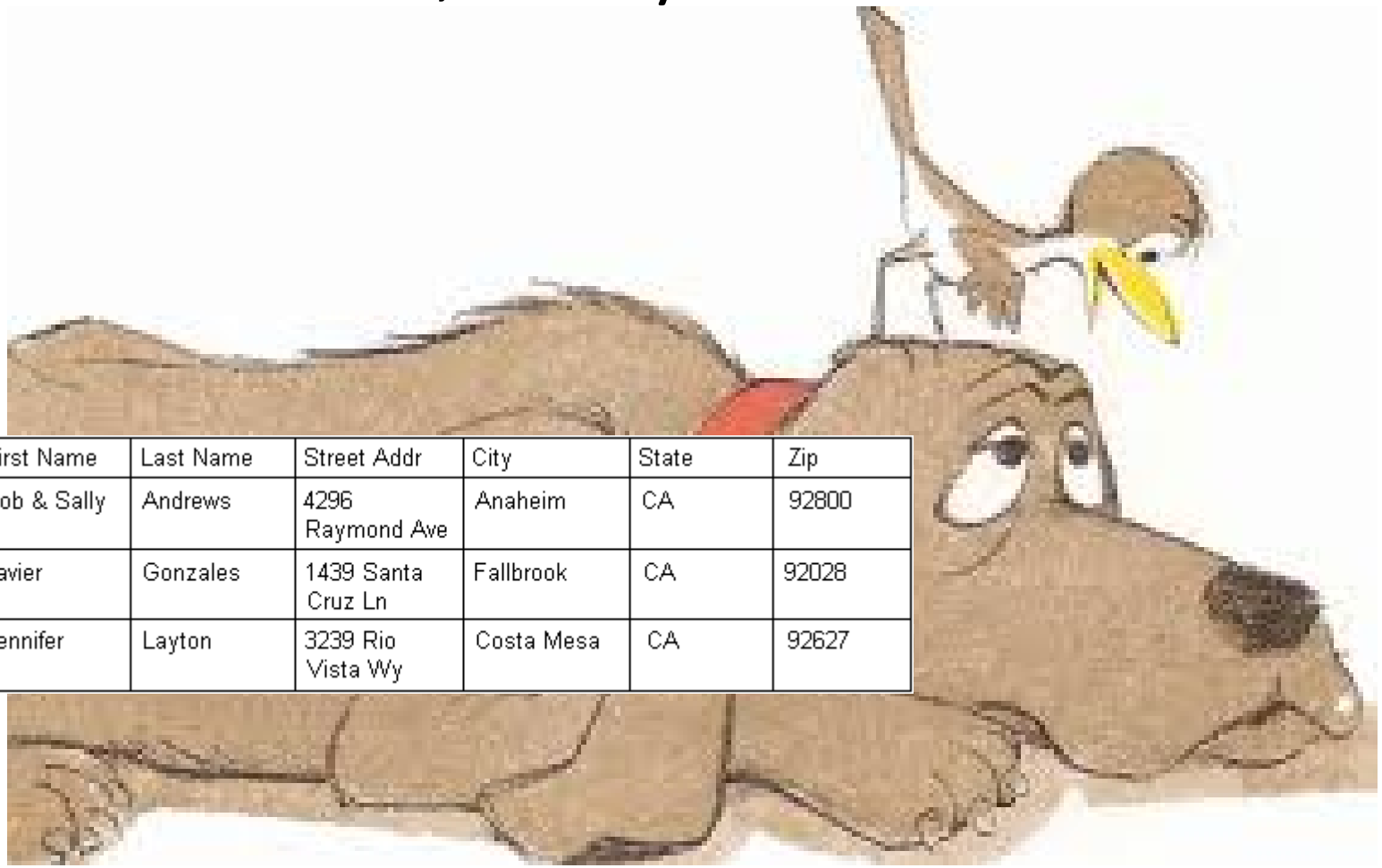
No, but you do have data in you!

Table in Word, are you a database?



First Name	Last Name	Street Addr	City	State	Zip
Bob & Sally	Andrews	4296 Raymond Ave	Anaheim	CA	92800
Javier	Gonzales	1439 Santa Cruz Ln	Fallbrook	CA	92028
Jennifer	Layton	3239 Rio Vista Wy	Costa Mesa	CA	92627

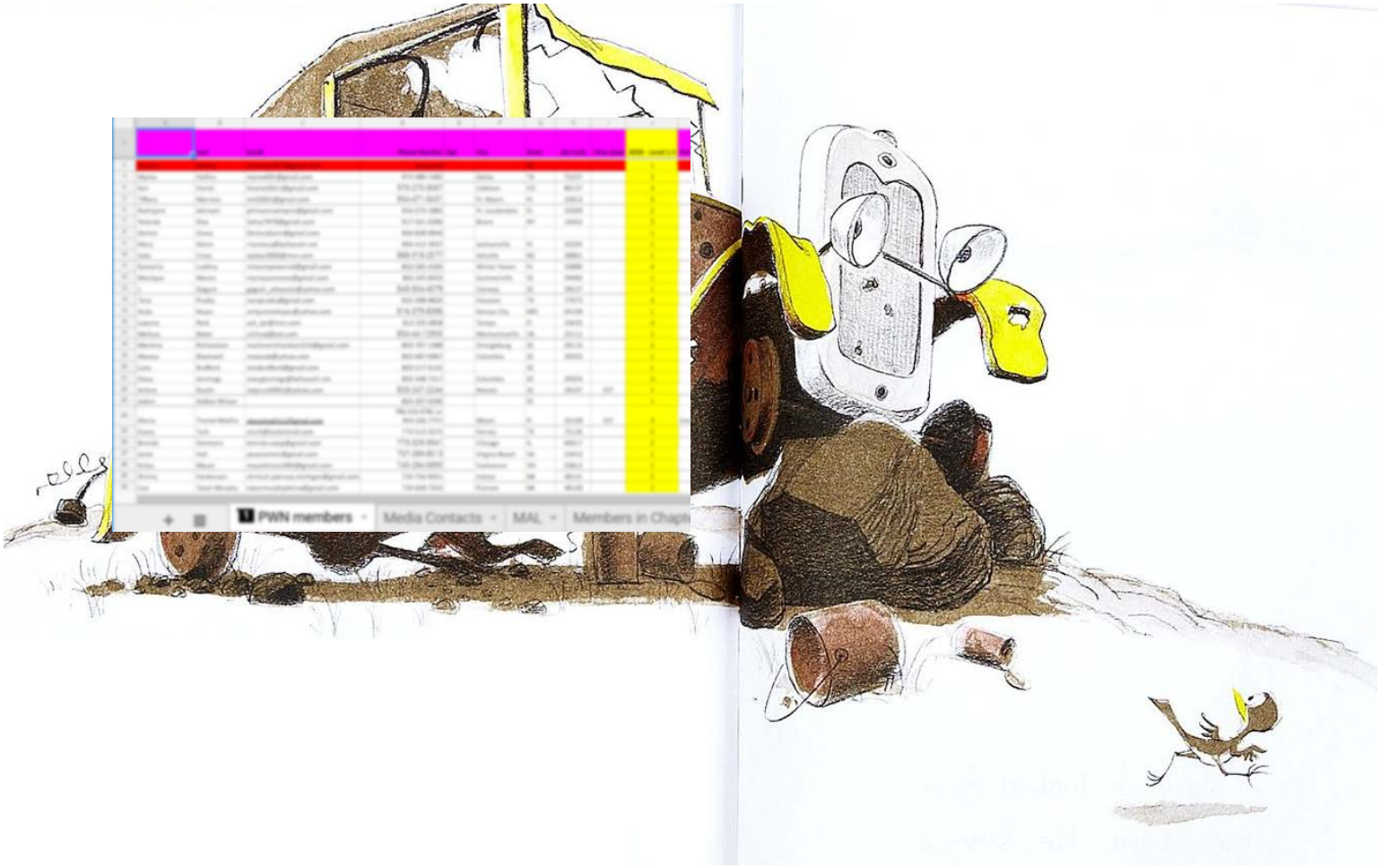
Table in Word, are you a database?



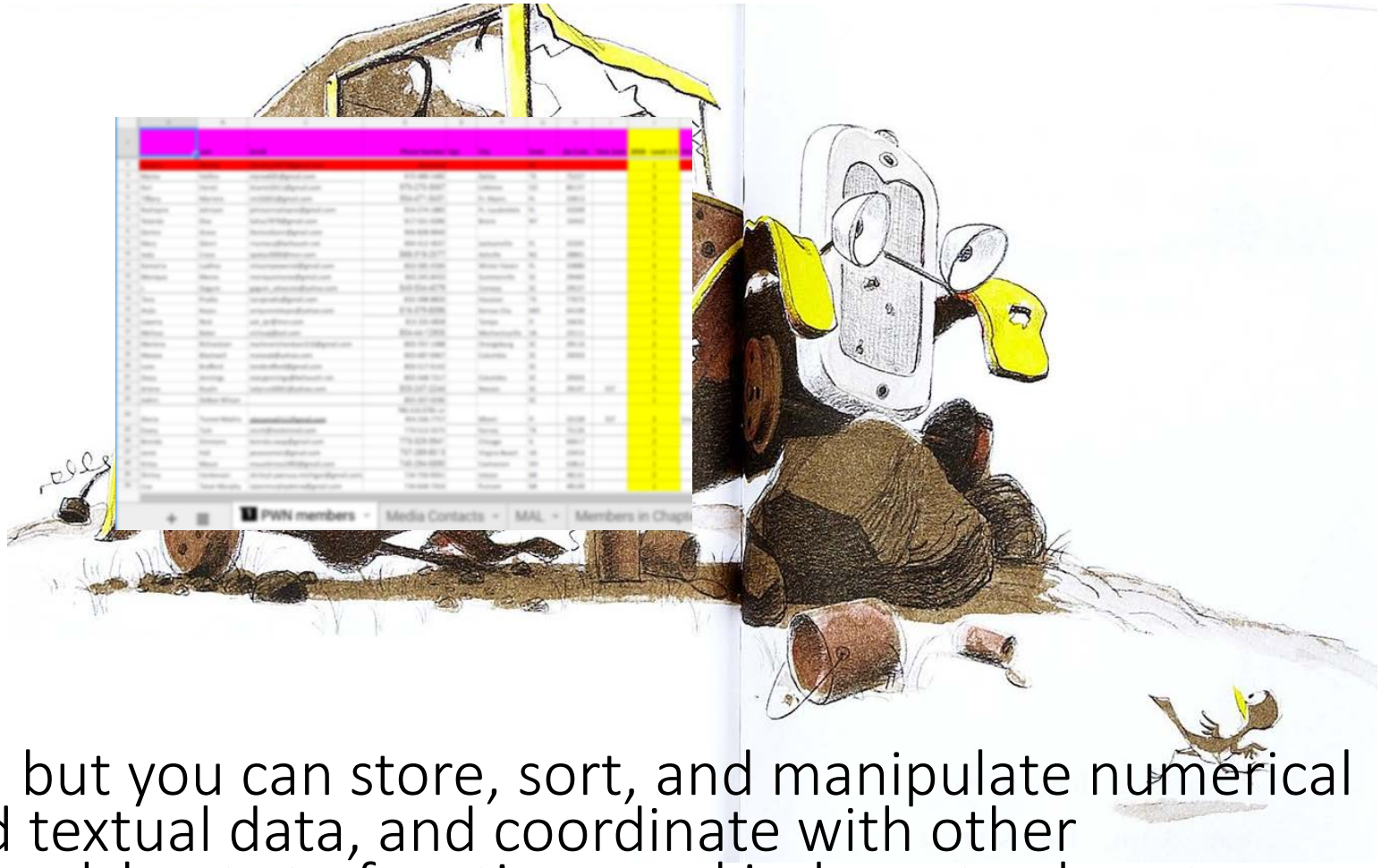
First Name	Last Name	Street Addr	City	State	Zip
Bob & Sally	Andrews	4296 Raymond Ave	Anaheim	CA	92800
Javier	Gonzales	1439 Santa Cruz Ln	Fallbrook	CA	92028
Jennifer	Layton	3239 Rio Vista Wy	Costa Mesa	CA	92627

No, but your data can go in a DB, too.

Spreadsheet, are you a database?

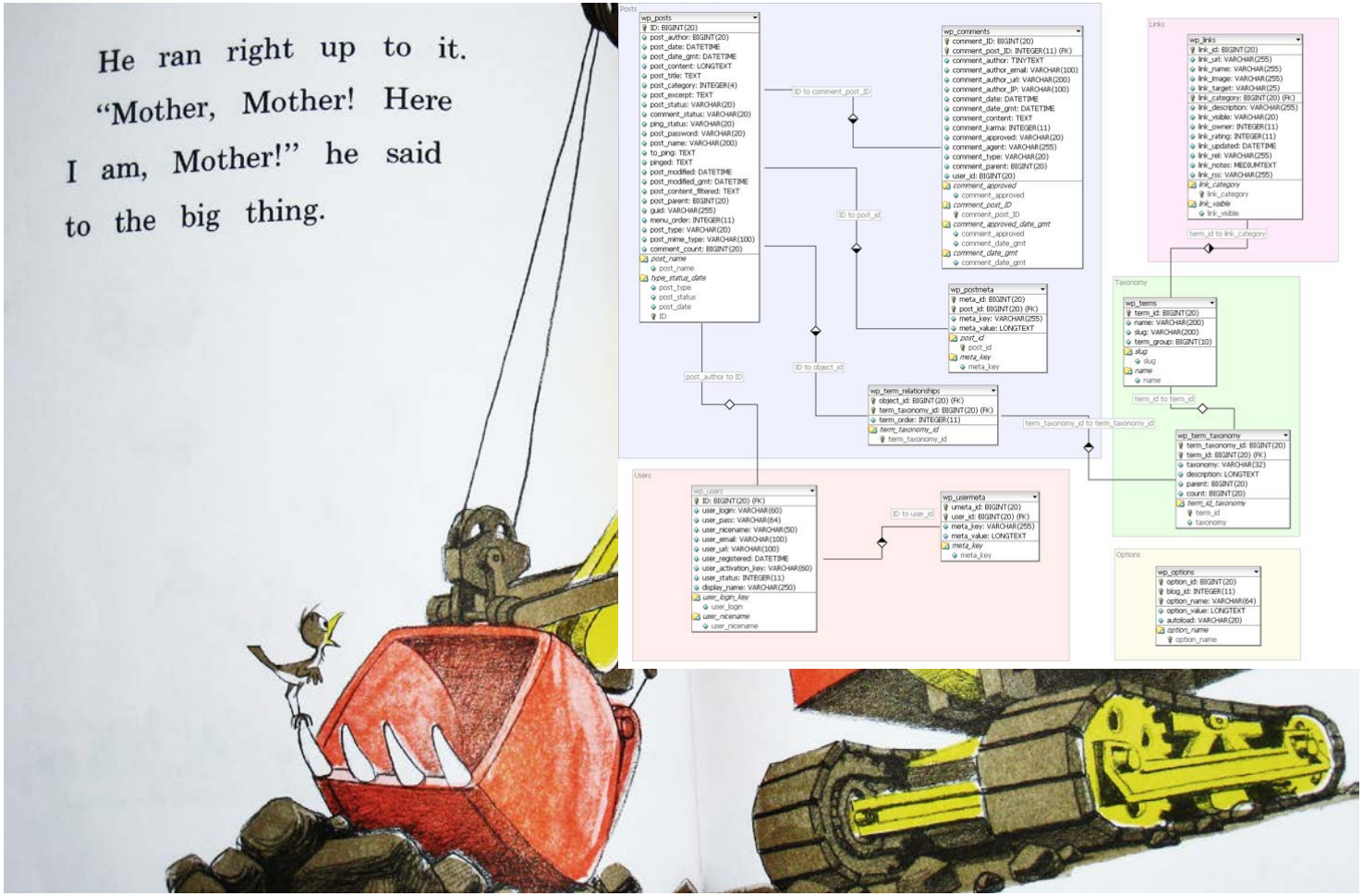


Spreadsheet, are you a database?

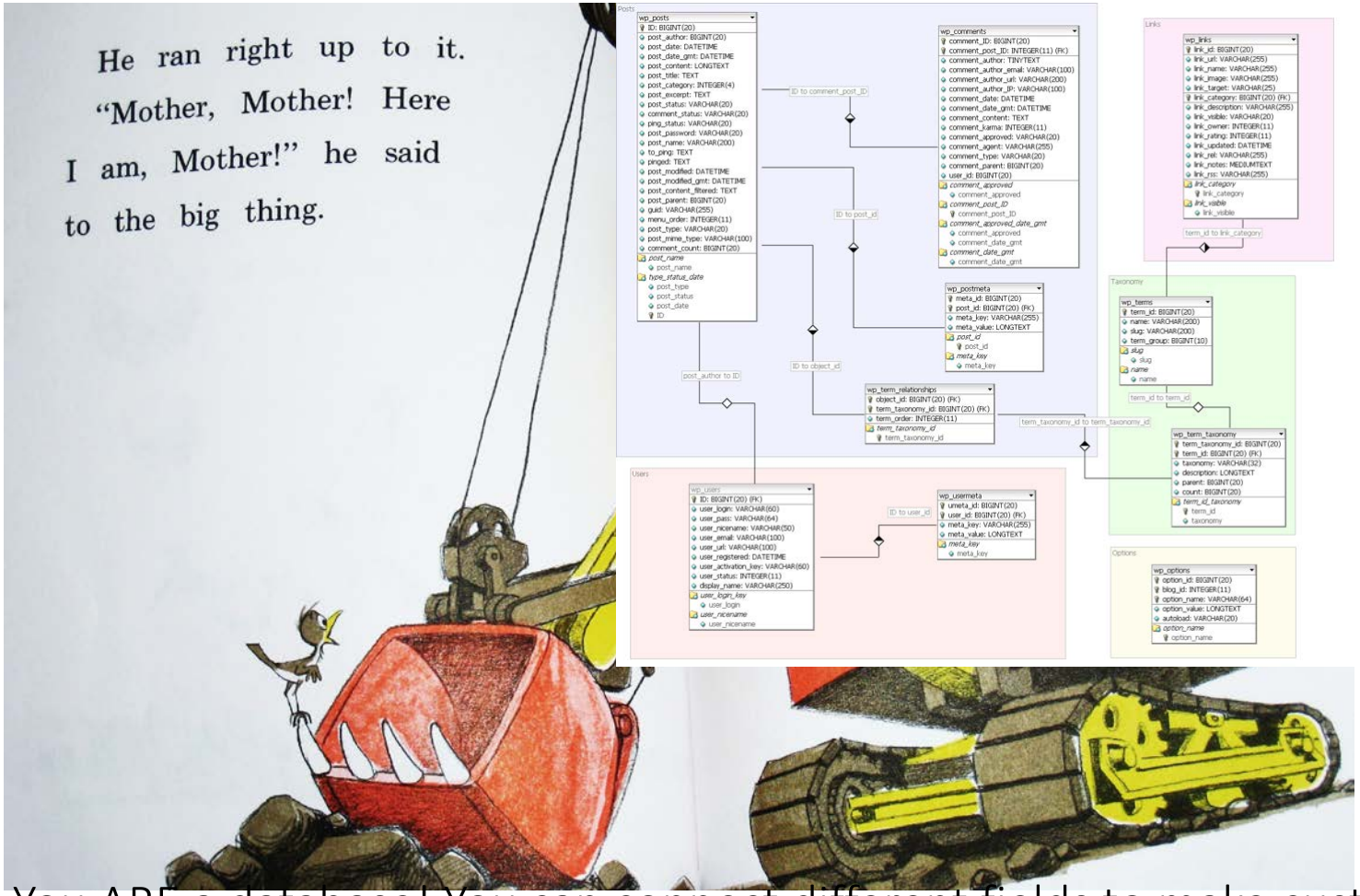


No, but you can store, sort, and manipulate numerical and textual data, and coordinate with other spreadsheets to function as a kinda sorta almost database sometimes when used in very specific ways.

Big thing, are YOU a database?



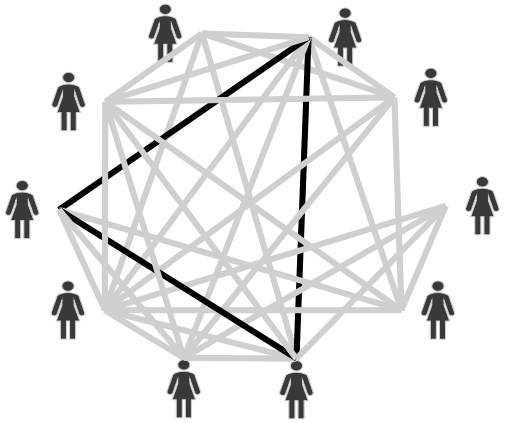
Big thing, are YOU a database?



You ARE a database! You can connect different fields to make custom lists with different information about related entities! You can store numerical & text data right alongside images and other files! You have customizable levels of user access! You have formal and robust search functions! I knew I'd find you, I just knew it!

Phase 2: Coming soon!

- Determining specific needs
  - Prioritizing into must-have and nice-to-have
- Exploring options & selecting a solution
  - Considering up-front vs long-term costs, dependability, user-friendliness, and more
- Building & testing!
  - Lots of testing. Lots.
- R-O-L-L-O-U-T!



Thank you!