Revamping the Customer Relations Management System for the Somali Youth Development Resource Centre

TEAM MEMBERS

Matthew Dzwil
James Hammel
Bradley Markiewicz
Matt Worzala

Sponsor

Abdiwahab Ali, SYDRC

D Term
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ADVISORS

Dominic Golding
Lorraine Higgins

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Abstract

The Somali Youth Development Resource Centre (SYDRC) is a non-profit organization focused on empowering youth to develop into their true potential. The purpose of this project was to improve SYDRC's ability to use a customer relations management (CRM) system for its data management and reporting. Through background research and a staff survey, interviews, and process analysis sessions, we determined that they needed to centralize their data and automate more tasks. We recommended new workflows and identified ways to better exploit the full functionality of their current CRM, developing and implementing accessible training materials for staff. We also implemented a new room booking system.

Left-to-right: James Hammel, Matthew Dzwil, Matt Worzala, Bradley Markiewicz
Inside the N1C Centre in Camden

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SYDRC.
Somali Youth Development Resource Centre

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Left-to-right: Bradley Markiewicz, Isahaq Abdikarim, James Hammel
Weekly session with Isahaq at the N1C Centre

Introduction

The Somali Youth Development Resource Centre (SYDRC) is a youth-led and youth-focused non-profit organization located in the London borough of Camden. It aims to give the Somali community in Camden the tools to succeed in life by providing a variety of services, ranging from academic sessions for students to community engagement activities for older members. The SYDRC comprises four major departments; Case Work handles community enquiries about housing, education and more. Youth services offers youth sessions such as boxing or football. MPower is a program that offers mentorship and advocacy for Camden youth. Finally, the administration department oversees operations and reports to trustees. Each of these departments in the SYDRC currently utilizes a shared customer relations management system (CRM) to store and manage information about their programs, events, and community members. A CRM is flexible software that has the overall goal of improving workflow and data management within an organization. A CRMs ability to connect organizations with their communities and relay data to stakeholders makes it a beneficial tool. A CRM allows an organization to increase the productivity of employees at minimal cost (Kristoffersen and Singh, 2015).

As the SYDRC continued to grow prior to the pandemic, they needed a CRM to better manage the increase in data. In early 2020, a Worcester Polytechnic Institute student group implemented *Substance Views* as a customer relations management system for the SYDRC. *Views* is a cloud-based CRM developed for non-profits to centralize an organization's data in one program. At the start of this project in 2022, the organization was not using the full capabilities of *Views*, due to the intricacies of the software and a lack of training and support. Thus, the overall goal for the project was to aid the SYDRC in collecting and visualizing their data to provide more information to stakeholders and better track the progress of their clients. We achieved our goal by completing the following objectives:

1. **Research and explore CRM usage in the non-profit sector to develop an understanding of best practices.**
2. **Determine the design requirements of a *Views* system and booking solution to better meet the needs of the SYDRC staff and clients.**
3. **Optimize *Views* and redesign their booking system to better meet the goals found in objective 2.**
4. **Develop and implement staff training with the aid of tutorial videos and an online searchable user guide.**

To achieve these objectives, we interviewed technical support staff from *Views* to improve our understanding of the software's functionalities. We also conducted a survey along with interviews and observations of the SYDRC staff's current data management processes to determine their needs and challenges with the current software. Based on these findings, we used an iterative process to test and implement changes to the SYDRC's *Views* configuration. To develop training materials, we used *Views'* main functionalities as a way to organize topics for an iteratively developed, online, searchable set of manuals.

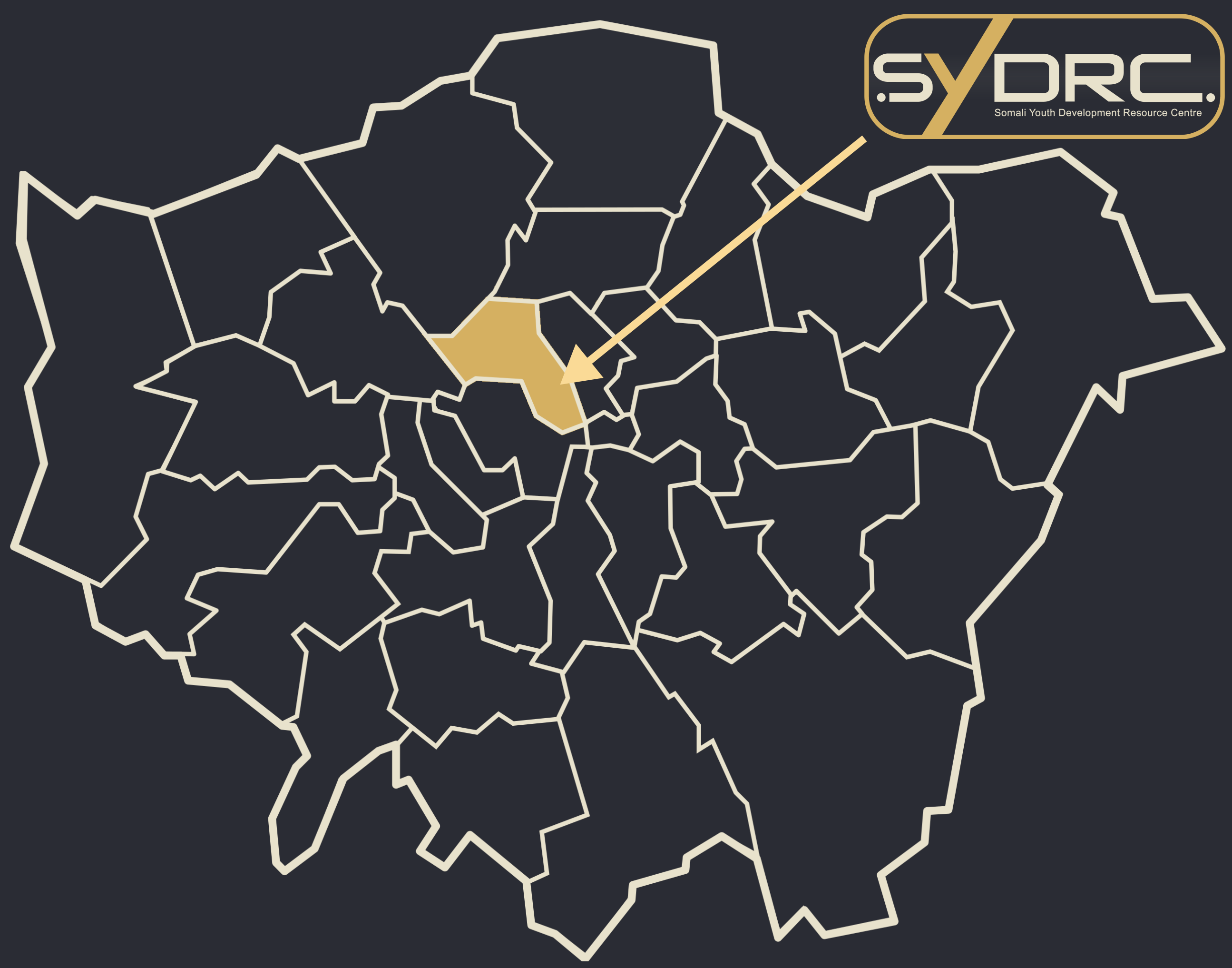
All told, our project automated many of the processes, integrated data from external sources into *Views*, and better utilized the CRM's functionalities to allow the SYDRC to manage their client and other data more effectively and efficiently. We also developed and implemented a new room booking system. These enhancements will allow the SYDRC to better manage and maintain their data and spend more time focusing on community involvement.

Background

The Somali Youth Development Resource Centre (SYDRC) is a youth focused charity located in Camden, whose mission is "to empower and inspire Somali young people to achieve their true potential by equipping them with the tools for tomorrow, to enable them to take responsibility for their lives and develop as individuals and make the successful transition to adulthood" (N1C Centre, n.d.). However, over the past couple years the SYDRC has pivoted to serve the Camden community as a whole (Abdiwahab Ali, Director, SYDRC, personal communication, January 28, 2022). Located in the N1C Centre in Camden (Figure 1), The SYDRC offers community programs, events, and meeting spaces.

Figure 1

The SYDRC is located in the London Borough of Camden



Adapted from Wikimedia Commons

Activities targeted towards youth include athletic classes such as dance and soccer (Figure 2), tutoring sessions, and mentoring programs (Charity Commission, 2021). Programs targeted towards families include women's only yoga and baby massaging class (SYDRC, 2021). The SYDRC believes that these activities and programs have played a role in the significant improvement in GCSE scores among Somali youth over the past 20 years. In addition, the SYDRC offers the community a support line for issues related to topics such as housing and education.

The educational attainment of Somali children in Camden has improved dramatically in recent years. In 2000, the year after the SYDRC was founded, only 3.1% of Somali children in Camden passed five or more GCSEs compared with 47.7% of all other pupils in the borough (SYDRC, 2022). However, in the 2011-2012 school year, as seen in Figure 3, 63% of Somali girls passed five or more GCSEs and 54% of Somali boys passed five or more GCSEs, doing slightly better than the average Camden pupil.

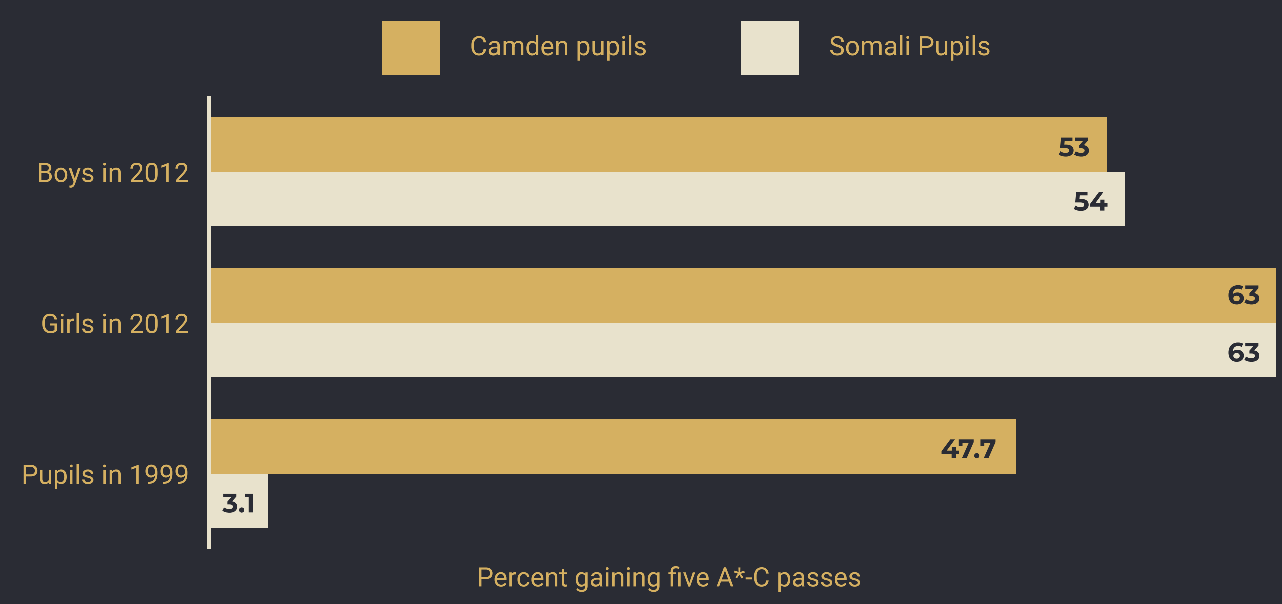
Figure 2

SYDRC Youth Football Session

(SYDRC, 2022)

Figure 3

Somali GCSE Score Improvement from 1999 to 2012



Adapted from data from the SYDRC (2022)

In 2020, the SYDRC served over 9,000 members of the community while only employing nine people (Charity Commission, 2021). While there are not many statistics that show the exact number of Somalis in Camden, the Open Society Foundations (2014) found that there were over 65,000 Somali-born British Somalis in the UK in 2011, with a large concentration of them in London.

Due to its size as well as limited funding, the SYDRC must have a cost-effective and organized system for managing their operations. In the months leading up to the COVID-19 pandemic, they worked together with a team of students from Worcester Polytechnic Institute (WPI) to develop the systems they use to track and manage their operations. Aponte et al. (2020) posit that the SYDRC staff were looking for ways to integrate participant feedback and track the progress of their clients efficiently with quantitative data.

Aponte et al. (2020) researched possible solutions and chose to implement *Substance Views*, a CRM used by other non-profits. The prior team also developed and implemented a booking system to help organize SYDRC event scheduling and room bookings. Unfortunately, before the current project began, the booking system stopped working, and SYDRC staff were forced to handle bookings through a cumbersome process of emails and phone calls. This project built on the previous groups' work to allow the SYDRC staff to take advantage of all functionalities of their CRM platform offers and to fix the existing booking system. In the next section, we provide an overview of CRMs before addressing SYDRC's specific use of the *Views* CRM.

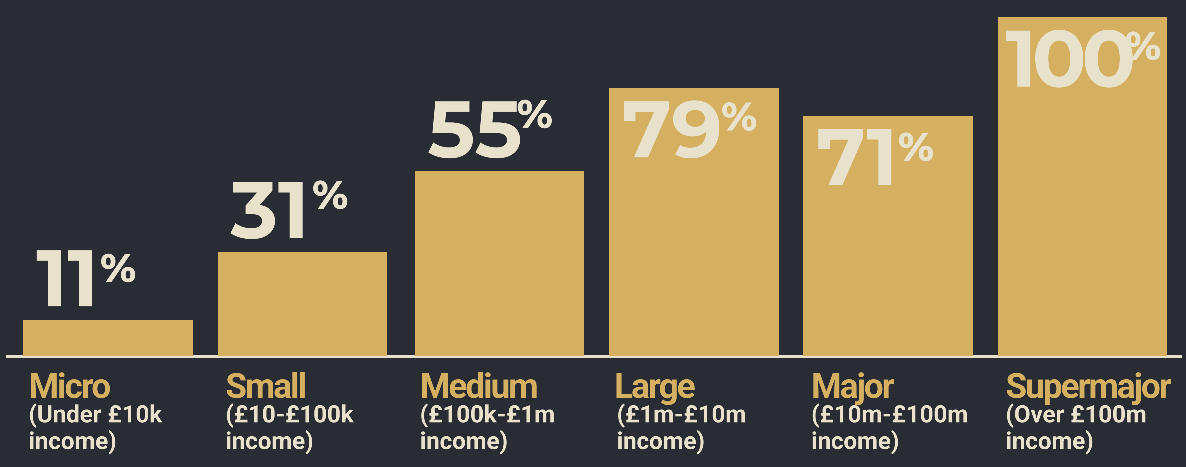
CRM's Benefit to Non-profit Organizations

Customer relationship management can be defined as a process of developing and maintaining relationships between an organization (business, charity, school, etc.) and the people it serves, whether program participants or customers. Customer relationship management itself is only a process, but today the term usually refers to a software which digitally implements CRM principles. This definition applies to CRM software implemented in the business sector, where the overarching goal is to generate profit; however, it also applies to non-profits that are concerned with providing an impact in their community. Even though the goals are different, business and non-profit organizations need to collect data on their operations and their collaborations so they can analyze it for strategic planning and reporting.

It is difficult to quantify the performance of a non-profit organization, but CRMs can help by tracking program and participant data to see changes over time. CRMs are essential to many non-profits so they can manage not only their client base but also their funders and fundraising activities. For example, over half the charities in the UK who are equivalent in size to the SYDRC use CRMs to manage their data (Figure 4). The larger the charity, the more they depend on this software. CRMs can provide many functions such as tracking data on events and programs, the number of participants at each event, geographic origin of clients, frequency of participation, and more. They can also record qualitative data about individuals, such as client and staff feedback on activities, programs, and events. This is important because it is difficult to measure the community impact of non-profits due to a lack of meaningful data (Prosper Strategies, 2020).

Figure 4

CRM usage in charities in the United Kingdom



Adapted from data from Salesforce (2022)

CRMs improve efficiency at a relatively low cost (Kristoffersen and Singh, 2015) in a number of ways: they can store contact information for easy and fast access, automate mailings, and keep track of funding digitally. In fact, according to salesforce research,

> **"82% of nonprofits with a CRM platform say it saves them time and increases their income"**
>
> Bull, 2020

Even if CRM software is not used to increase funding, saving time is just as critical. Many non-profits have a small number of employees who do all the work, and saving one employee a few hours a week can have big benefits. The financial benefits of CRMs are reported in terms of return on investment or how much money a CRM will make or save the organization for every dollar spent on installing and maintaining it. One study determined that in 2014, for every dollar a company spent on a CRM it got back $8.71 (Salesforce, n.d.). Even though this statistic does not directly apply to non-profits, it does show how CRMs could allow non-profits to do more with their funding. There is extensive research on the applications of CRMs in businesses; however, there is not a lot of documentation outlining how CRMs are implemented in non-profits. We can learn about CRM implementation in non-profits from one case study outlined below.

An example of a successful implementation of a CRM in a non-profit is Plan Norway, who works in underdeveloped nations to improve education, living conditions, and rights for children (Plan International Norway, 2021). Plan believed that a CRM would allow them to provide their sponsors with more informative data which would inspire them to continue sponsoring the organization and contributing funds for their programs.

In the first year (2001) after their CRM implementation, Plan increased their sponsor retention rate by ~4%. Three years later in 2004, it increased by an additional ~2.5% amassing over 90,000 total sponsors, 25,000 more than in 2001 (Kristoffersen & Singh, 2015). The success of Plan Norway has many attributes that can be applied in the SYDRC's implementation of a CRM. The whole team at Plan understood what the end goal of the CRM was: to better analyze data in an effort to predict future trends to garner more sponsors. Their objectives were to have it integrate with their current database, expand with the organization, and to automate manual tasks. A larger focus on sponsors can lead to the organization better serving their community. Knowing what the end goal of the CRM is and creating objectives to achieve the goal is immensely important to incorporating a CRM in a non-profit (Kristoffersen & Singh, 2015).

Substance Views

There are many different types of CRMs from which an organization can choose, but the SYDRC chose to use *Substance Views* on the recommendation of the previous team in 2020. *Views* is a managed, cloud-based CRM tailored "to help charities, non-profits and social purpose companies organize and analyse data in a single platform" (Substance, 2022). *Views* is a complete package for a yearly cost of £980 and separates its tools into four distinct categories as shown in Figure 5 (Substance, 2022). *Contacts* holds records for all employees, volunteers, stakeholders, funders, and participants, and allows staff members to generate reports based on the data entered for each contact. The *Work* section manages a listing of the services or programs provided by the organization and a calendar to quickly view planned events.

The *Evidence* section is a storage area for any data such as images, reports, and questionnaire responses. Finally, the *Intelligence* function ties everything together allowing the employees to generate statistical summaries/reports privately or publicly for stakeholders to review (Substance, 2022). A small section of one such report can be seen in Figure 6. These tools combined allow a user to aggregate all staff work into one unified platform instead of spreading data over many smaller sources–such as Excel spreadsheets–as they have done in the past. Since the CRM solution is managed by Substance, the end user does not need to worry about infrastructure issues on their own and can contact the *Views* support team if a technical issue arises. Nevertheless, usage issues such as learning how to create custom dashboards or statistical metrics are not directed to the support team. Instead, *Views* provides a limited user manual so that the organization's staff can learn to customize and manipulate the data as they see fit, but this can be overwhelming to non-technical staff. Consequently, the SYDRC and other users have not been able to use *Views* to its fullest potential simply due to a lack of time and technical experience.

Figure 5

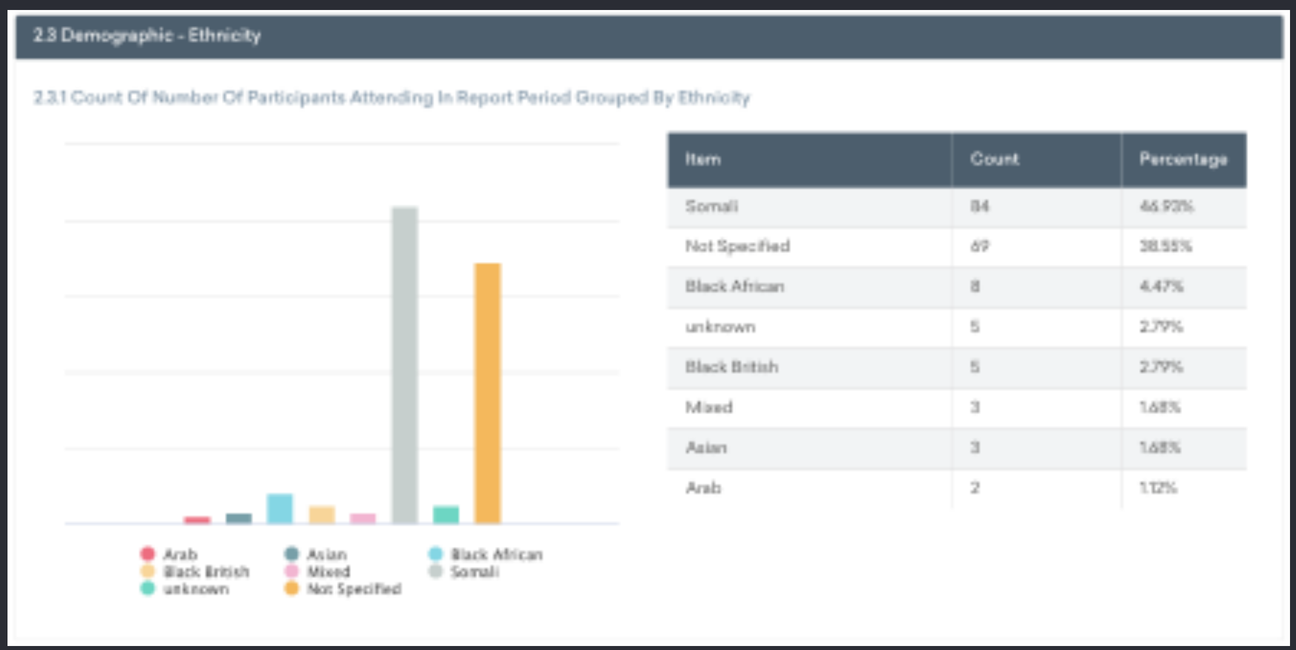
Views four main components

Contacts	Work	Evidence	Intelligence
Participants	Activities	Media	Statistics
Stakeholders	Groups	Questionnaires	Statistic Summaries
Staff	Venues	Case Studies	Targets
Volunteers	Calendar	Bulk Additions	Report Templates
Funders			Reports
			Exports
			Contact Inactivity

Adapted from Substance (2022)

Figure 6

Sample report generated by *Views intelligence* tab



Item	Count	Percentage
Somali	84	46.93%
Not Specified	69	38.55%
Black African	8	4.47%
unknown	5	2.79%
Black British	5	2.79%
Mixed	3	1.68%
Asian	3	1.68%
Arab	2	1.12%

Adapted from Substance (2022)

Introduction to *Views*

The SYDRC had been using *Substance Views* for over two years as of April 2022. The CRM was implemented to improve the workflow for the Somali Youth Development Resource Centre (SYDRC) by offering centralized data management for the organization. Before describing what our research revealed about the data management needs and workflow in each department of the SYDRC, we first summarize some of the basic utilities within *Substance Views*. Each component of the system (*Contacts*, *Work*, *Evidence*, *Intelligence*) contains a different set of utilities. Additionally, *Views* has two more relevant functions outside of the four main components: Dashboards and Administration.

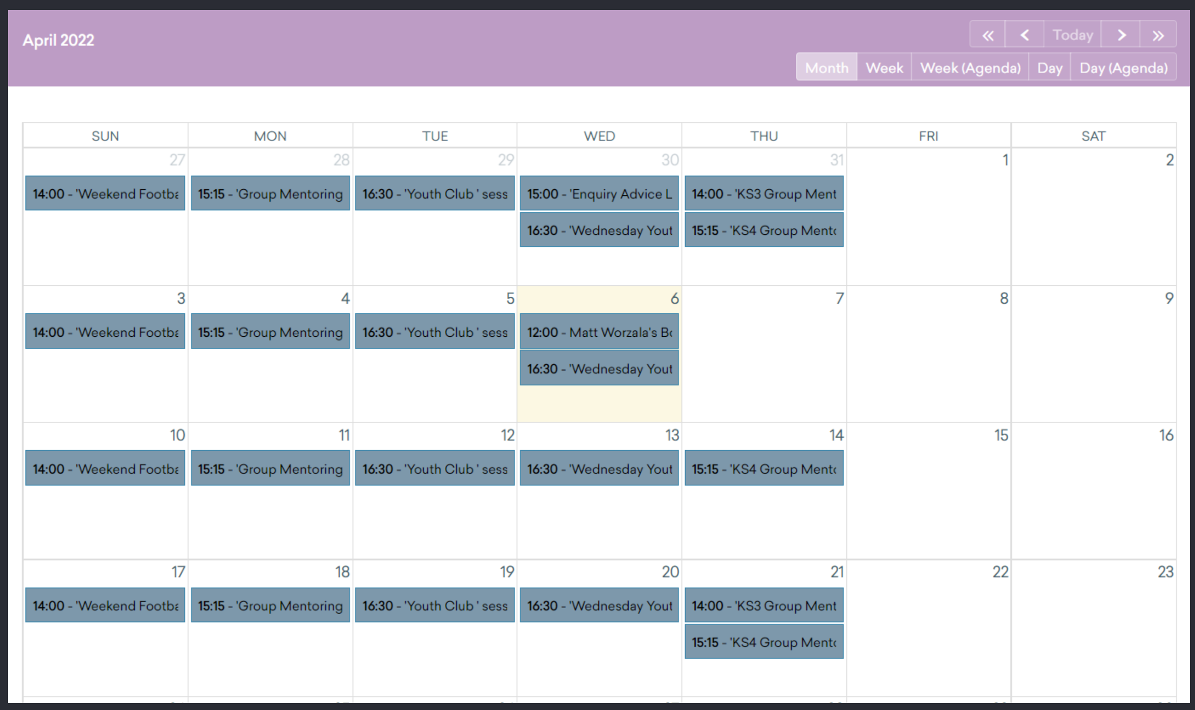
Contacts is where a user can store information about clients (participants) and staff. The SYDRC stores data on religion, race, school, and more for each participant, but the user can fully customize what data to store. *Contacts* can be linked to other information within *Views* such as what activities the participants attended or any questionnaires they completed. The most useful aspect of *Contacts* is that it centralizes all participant information into a searchable database.

The **Work** section includes information on activities, including participants, venues, dates (see Figure 7), and staff leaders. *Work* tracks all scheduled mentoring sessions and room bookings, for example. Activities have recurring sessions that happen at configurable intervals. Each activity has registered participants who are expected to attend. Staff can mark down which of the registered participants did or did not attend. They can also add notes to each session of an activity to summarize what the activity entailed and how it went. Staff can also record outcomes achieved by participants within sessions, such as improved social skills or developing a CV or resume. These notes are reflected on the profile of each participant who is registered.

The **Evidence** section includes questionnaires (or surveys) that any participant or staff registered in the *Views* system can use to assess participant progress or session effectiveness. The process of creating a questionnaire is similar to Google Forms. Staff may select the type of question desired (e.g., drop down responses, scales, etc.), write the question, and then add the pertinent response options, if any.

Views has a feature called summaries that allows users to analyze responses to a questionnaire. Users can filter certain types of responses and save the results for later viewing. *Views* allows the user to compare up to three distinct summaries to each other. Summary comparison is beneficial if, for example, a department wants to compare the responses from the current month to those of the previous two months to track progress.

Figure 7
Views calendar inside the Work section



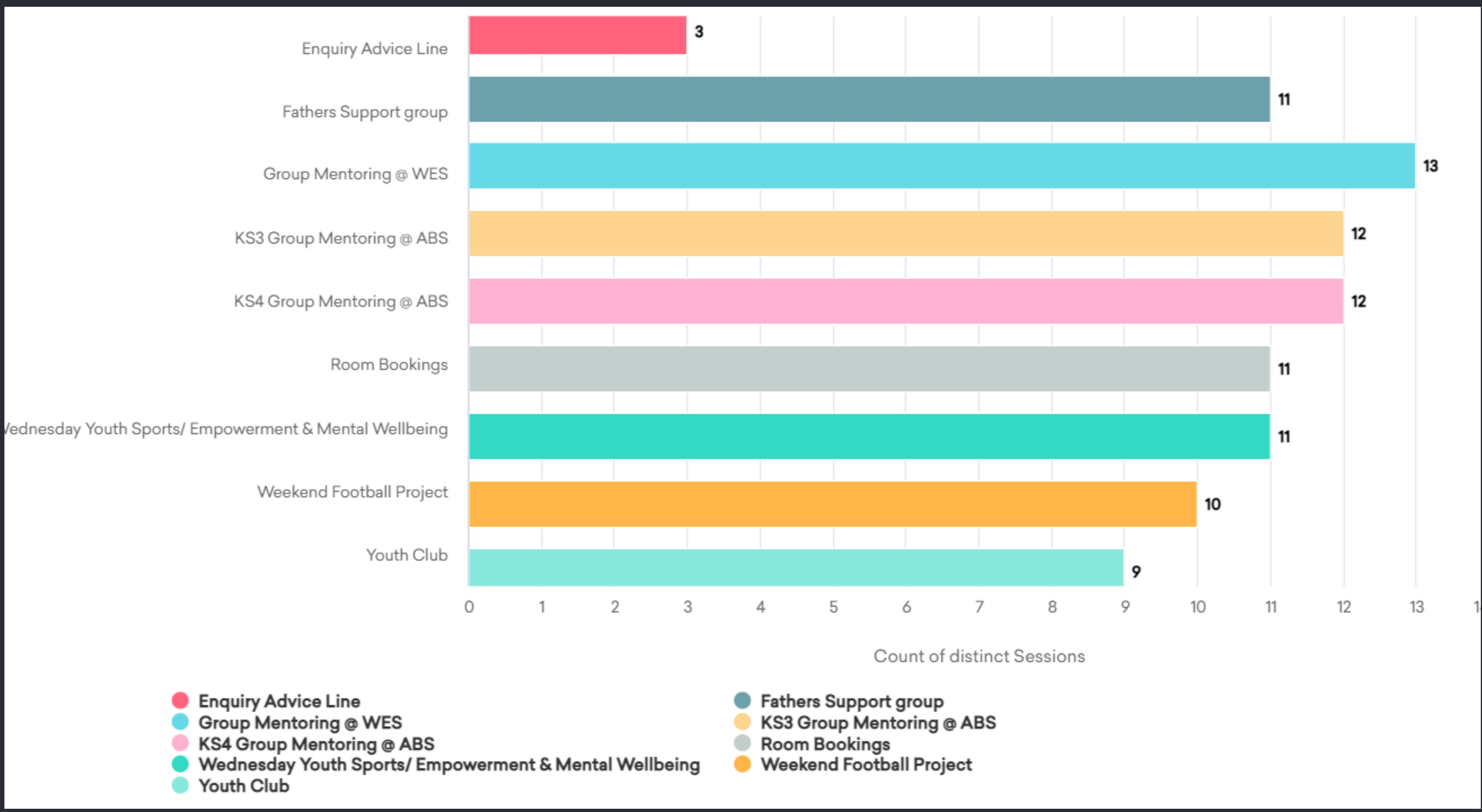
The **Intelligence** section allows users to create tables and visuals that report progress or summarize data stored in *Views*. This allows the user to use statistics to generate graphs and summary statistics on *Contacts* (participants or staff), *Work* (activities or groups) and *Evidence* data (questionnaires). As of March 2022, *Views* introduced a new beta version of statistics called statistics (new). This allows users to create more advanced statistics; however, since it was in beta version during our project, it was not usable in other parts of *Views*. Specifically, the new statistics could not be added to dashboards, where they would be useful. That said, Figure 8 displays the power a statistic (new) can have when it is out of beta. The graph displays information about the number of sessions each activity in the SYDRC held in the past three months. This is relevant to the organization as it is a quick and easy way to display data that could take an hour to do manually. It allows the administration within the SYDRC to see what sessions are most active and reassess their strategy for the next month.

The **Administration** section is accessible only to certain users and allows them to further customize the *Views* framework. It allows users to change some of the fields visible in many areas of *Views*, like what questions appear when you create a case study.

The *Administration* section presents technical details that might be useful to someone with an IT background but may not be useful to the average user. Only certain users have access to the Administration section for security.

Figure 8

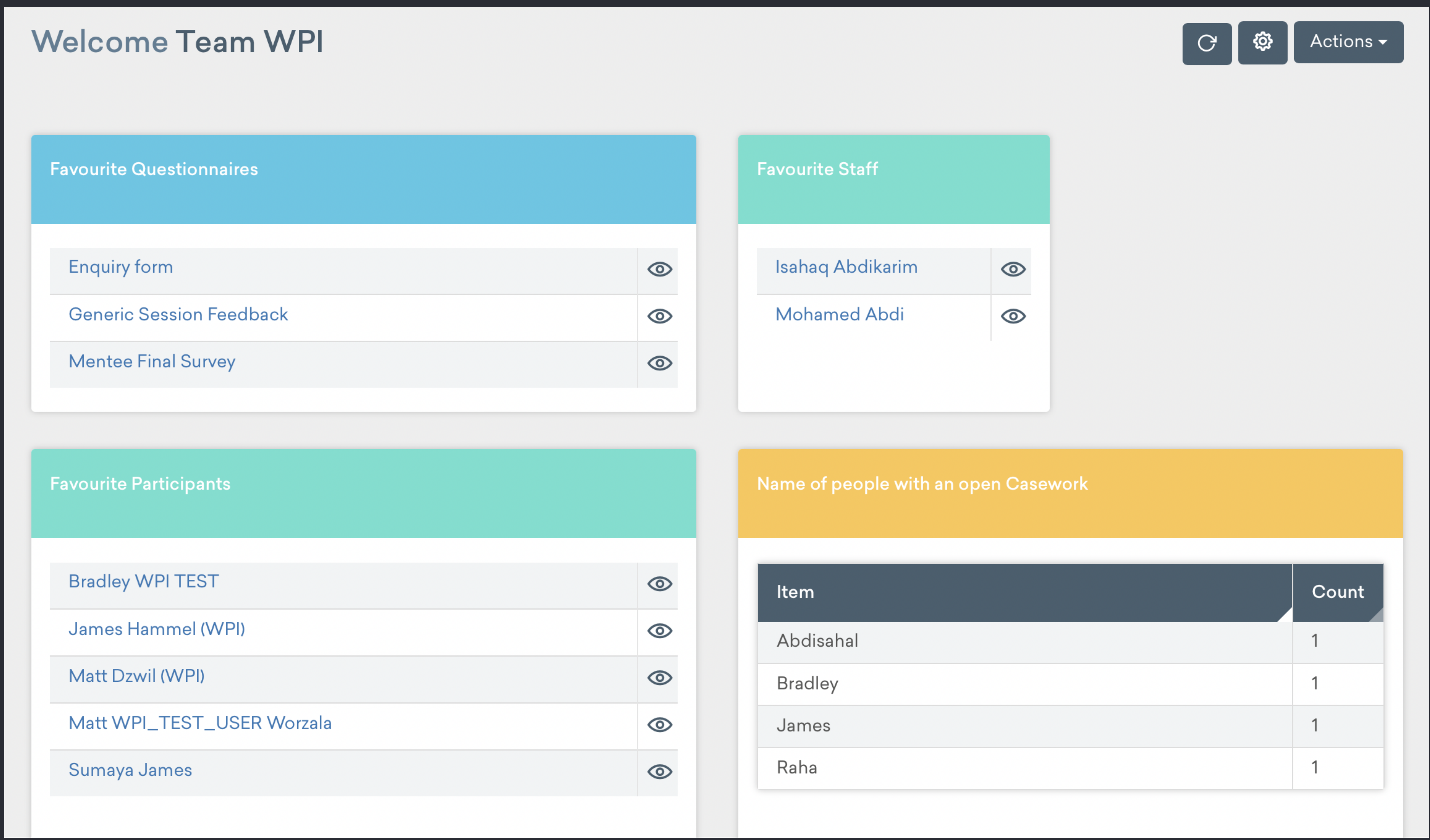
Three month summary of number of sessions held for each activity in the SYDRC



Dashboards are customizable pages that show widgets which can be created and modified by the user. Figure 9 shows an example of a dashboard. Dashboards can also provide a shortcut to navigate to favorite items within *Views* meaning that a user may "favorite" a questionnaire, then navigate back to it with a single click from a dashboard. Dashboard widgets can also contain statistics, giving the user a snapshot of important metrics specific to them or their department. A single user may have any number of dashboards, and single dashboards may be shared between multiple users. For each user, one dashboard must be chosen as their homepage, which will be the first page when loading *Views*.

Figure 9

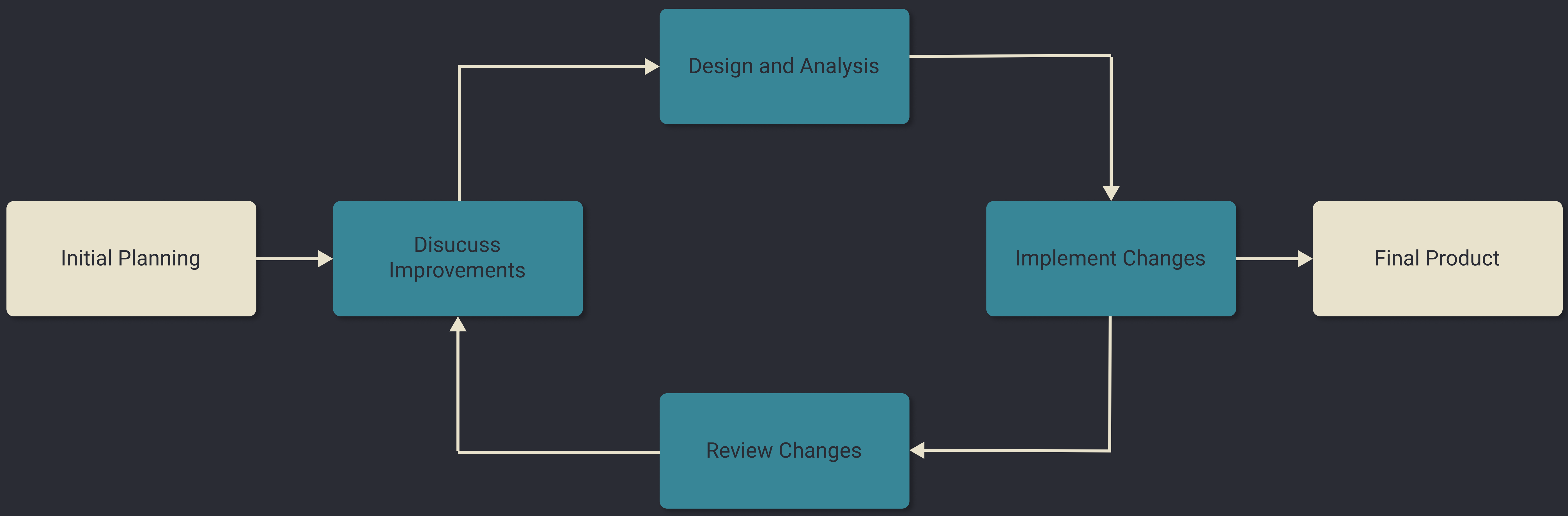
Example *Views* dashboard with widgets for favorite questionnaires, staff, and participants, as well as a sample Statistic



Design Process

Although the SYDRC tried to use *Views* as a primary method to store and visualize data, a lack of technical expertise and support from *Views* (including lackluster documentation for the CRM), caused the organization to develop workarounds to meet their day-to-day needs. Given their limited time, staff reverted to using Word, Google Forms, Outlook, and other external apps to complete many tasks rather than exploiting all the functionality within *Views*. To determine each department's workflow inside of *Views* and understand missed opportunities and inefficiencies, we surveyed members of each department, observed them as they used the system, and interviewed them to understand their work process and the problems that they encountered with *Views*. After understanding the workflow and their needs, we implemented and reviewed changes weekly with each department. Staff gave feedback on these changes, which allowed our team to iteratively refine our changes to better meet the needs of the SYDRC staff. Figure 10 highlights this process visually. During this process, we focused on re-incorporating *Views* into their organization using the built-in functionality of the CRM rather than external workarounds.

Figure 10
Iterative design process



We applied the process shown in Figure 10 to each department which created a solution that is not only improved, but well understood by staff. This process allowed our team to not only get constant feedback, but as one department head said,

> “This process has greatly improved my confidence in using Views”
> SYDRC staff member, personal communication, 2022

We will now discuss each department, how we utilized this iterative process to determine design requirements and improvements, as well as the specific work we completed for each.