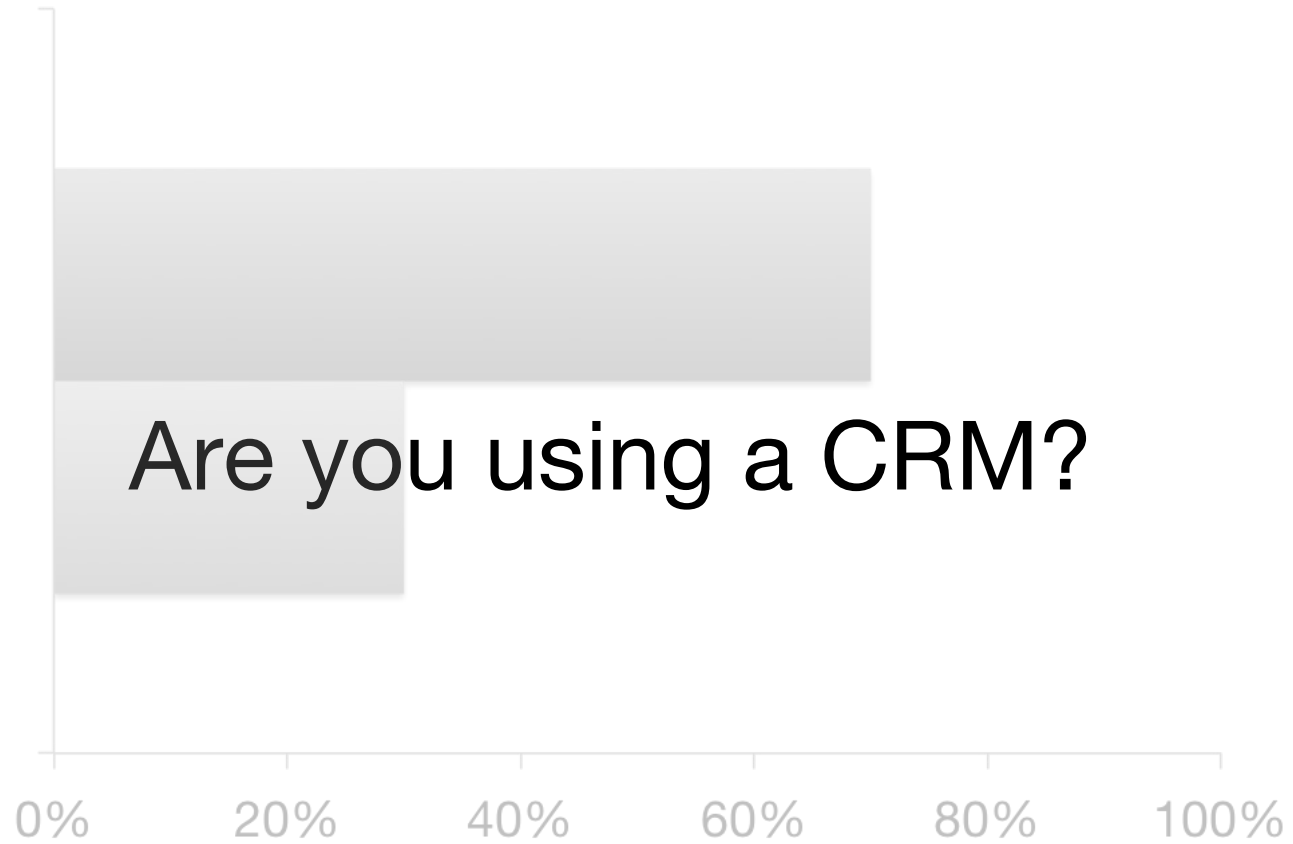




How to Think Like a CRM Admin

#16NTCadmincrm

Poll #1

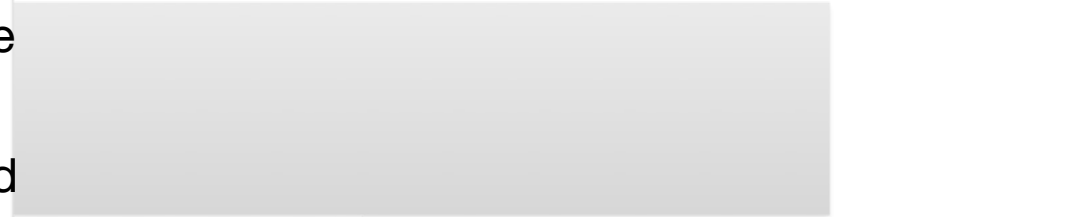


Poll #2

Which CRM are you using?

- Salesforce
- CiviCRM
- Blackbaud
- Microsoft Dynamics
- ETO
- Apricot
- Donorperfect
- Zoho
- SugarCRM

0% 20% 40% 60% 80% 100%



Poll #3



Terminology

CRM	Customer Relationship Management, Client/ Donor/ Student Database
Sys Admin/ System Administrator	The person at your organization who manages your database (answers questions, works with consultants, ensures it is up and running, etc)
Data Model	The structure for how you track data in your CRM system
User Profile/ Settings	Allows you to set up access and viewing privileges for data that are unique depending on your role/ responsibilities
Objects/ Fields/ Record Types	The way that Salesforce organizes data (these terms are also used in other databases)
Version Control	A system that enables you to make changes to software that helps reduce disruption to users, etc.
Sandbox	A copy of all or some of your system that is used for testing/development
Production	The live version of your system that users are accessing

The Role

- How did you become a CRM Admin?
- What does being a CRM admin in your organization mean?
What are the types of activities you are responsible for?
- What part of the organization does your role fall in?

The Person

- What skills do you need - soft and hard skills?
- What mindset can help you be successful?
- What type of training have you had (official and unofficial)?
What is most helpful?

The Needs of a New CRM

- What role should the CRM admin play in choosing and launching a new CRM?
- What are the best practices for preparing to launch a new CRM?

The Needs of a Developing CRM

- As a new CRM of an existing system, how did you get up to speed on the system?
- What are the key aspects of ensuring on-going success of your CRM?
- How do you get support when you can't solve problems/ the needs of the user are beyond your capabilities?
- When should you reach out to a consultant? How do you choose a consultant?