

Final Presentation Team CPAC

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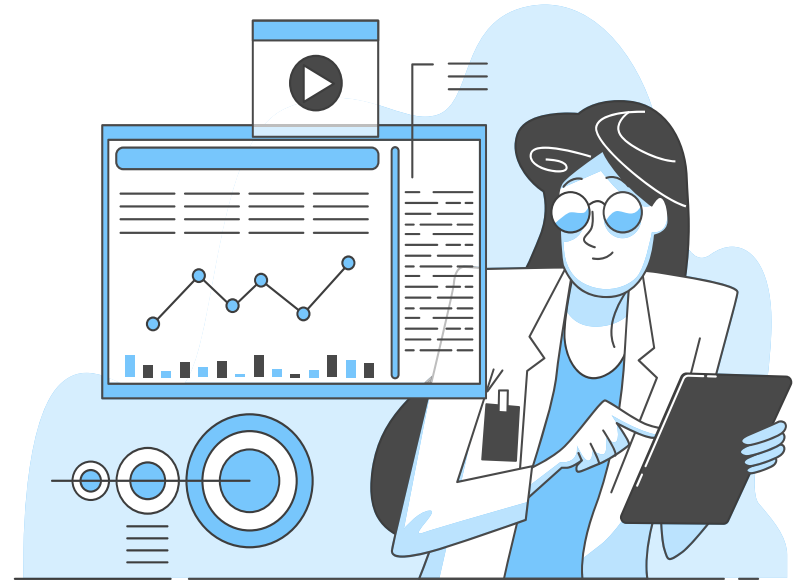
Client Introduction

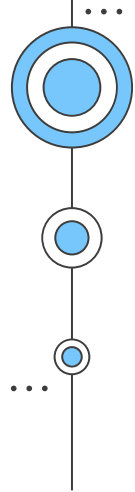
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Problem Analysis

03

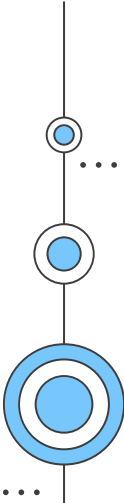
Recommendations

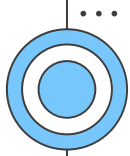




01

Introduction





Introduction of our client:

Partnership for The Arts & Humanities



Founded in 1998



Canton, MI

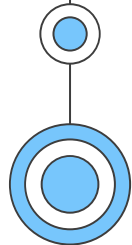
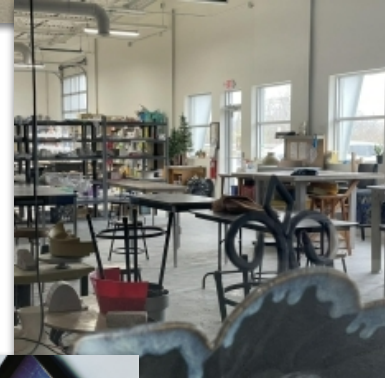


Raise funds for **arts and culture** programs and encourage the development of cultural arts and humanities in the canton township



With the help of more than 500 donors, in 2019, they just opened a completely renovated warehouse with 17,500 square feet for 16 **art studios** including tattooing, pottery, photography, and other visual arts

...



Problems



“ We currently use 30+ TECH programs and applications to run day-to-day operations **with no connectivity between them.**”



name
email
amount
....



name
pay amount
pay day
....



name
email
event info
....



email
content
....

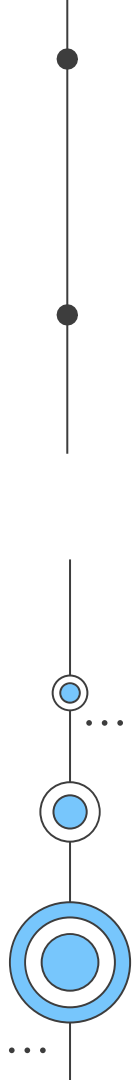
“We are searching for a solution to incorporate a **relational database** and **integration** of all platforms
... connecting donors, contributors, tenants, renters, vendors, employees (payroll), expenses, events, social media, website presence”





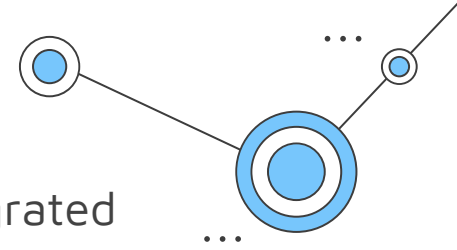
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Problem Analysis



Major Problem:

The software at the organization is underutilized and not integrated



Underutilization

- Most employees are new and not tech-savvy, thus **not familiar** with softwares
- The organization is using multiple software platforms and even **spent a large amount** money on some software
- Most of softwares are **not** being used to their full capacity

Lack of integration

- Data transfer is required for the organization's workflow
- All the softwares are **stand alone**, no means to transfer data between each other
- Employees have to fetch and update information in different softwares manually

Underutilization

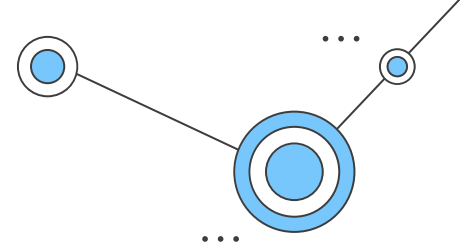


Lack of integration



Understanding the Problem:

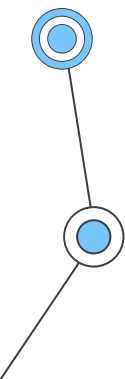
Software under-utilization



There was a general agreement among the among the research participants that the software at the organization is being under-utilized, and causes issues like:

- Poor data management
- Spending more time than necessary on tasks
- Lack of donors

... and many more.



“Donorperfect is **under-utilized** because no one understands its capacity” - P03

“People don't use ME calendar causes the **room use conflicts**” - P01

“The reason why people don't use donorperfect is that they **don't get trained** about its usage” - P01

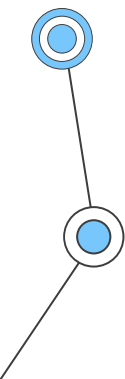
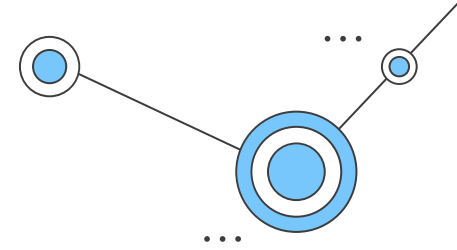
“We started using slack recently, but haven't used it that much - it is **under utilized** because there are only 3 people are on it” - P03

Understanding the Problem:

Lack of software integration

It is important to have a certain level of integration or communication between the software something that is currently missing. This is causing issues including, but not limited to:

- **Manual** recording and transfer of data between different systems
- Employees being **unaware** of important information
- **Miscommunication** between the employees



“I use gmail for communication; excel, Adobe to make board packages and flyers; and ME calendar on the website” - P01

“Donorperfect is **not connected** to mailchimp which makes reaching out to donors **inconvenient**” - P03

“I use google forms as a spreadsheet for the subscription information, and export the report manually to mailchimp” - P04

“I have to **manually create and combine spreadsheets** for different events to get all the information about the sponsors participated in all the events” - P01



03

Recommendations



Recommendations



If budget & time are limited



Software Training:

- Encourage current employees to go to training session provided by softwares, record sessions for future use

Documentation:

- Maintain in-house documentation that can help train new employees about the software



Use Integration provided by current software:

- Quickbooks (financial) can be incorporated into Donorperfect (donor management)



Recommendations

If budget & time are adequate



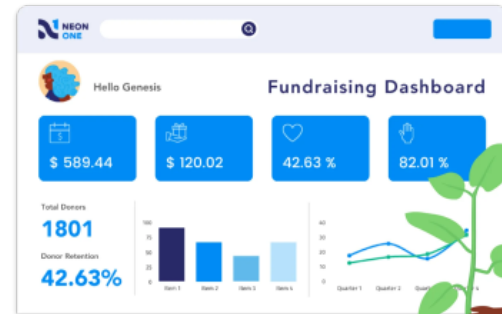
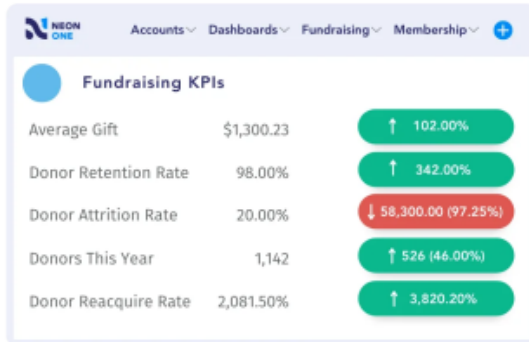
New Hires:

- Recruit talents with data processing skills and software interaction capability

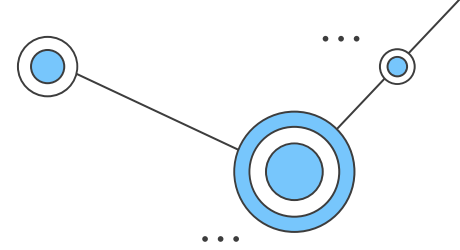


New CRM (Customer relationship management) Softwares:

- Switch to platform with better integrations of softwares
- e.g. Neon One, it can integrate with mailchimp, quickbooks, eventbrite; it is even more economical than current software



Conclusions



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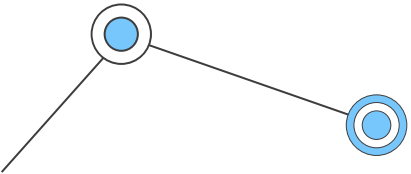
Our client has strong project management and planning capabilities, but still have many defects in the field of **software usage**

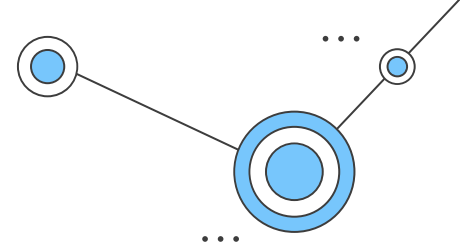
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Software underutilization and **lack of integration** are the major problems
Causing time-consuming manual recording of data, inefficient track of information

03

We suggest employees to go to software **training** sessions and keep **documentation** for future reference
If budget and time permitted, we suggest our client to hire **tech staff** with data management skills, and consider switching to a **CRM** platform with a better integration functionality





Thank you for your attention!

Do you have any questions?

