

Implementing CiviCRM at Leukaemia & Lymphoma Research

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The Organisational Perspective

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Overview

The Organisational Perspective

- Needs
- Resources
- Customisation
- Immediate Results

About LLR

Leukaemia & Lymphoma Research

- Established, mid-sized charity
- £20m/year
- income streams and efforts
 - Sports Events, Corporate, Trusts, Legacies, Special events, Major donors, Regional and Community fundraising
 - Research grants, Patient Information, Shop /trading

Needs

“A CRM system that allowed the entire organisation to work from a central repository of all their supporters and other contacts, enhancing their relationship management and customer insight potential.”

Needs

- Accessible
- Stable
- Flexible
- Integrated
- Cost Effective

Resources

OVERVIEW

- Time
- Team
- Mandate

Time

10 Weeks

- 6 weeks: Implementation of core processes
- 4 weeks: Post go live support

8-10 weeks: Reviewing and improving processes

TOTAL: 4 months

Team

Core Team

- Project Manager
- Civi Implementer
- Developers (x2)
- Database Manager

Mandate

How Civi Met Needs

Out-of-the-box

Customisation

- Batch processing
- Financial processing
- Financial adjustments
- Reports

Immediate Results

Time saved: 25 staff days/month

- **Integrated event registration (2 days/week)**
- **Reduced donation processing time (2.5 days/month)**
- **Increased staff use and distributed expertise**

“As an organization we have saved a huge amount of time. A lot of hours spent manipulating data and processing has been negated owing to the improved functionality Civi has given us (LLR).

We’ve moved from the database being something rather specialist or niche to creating something that all staff can use, develop and take pride in.”

--Head of Customer Services

CWOLFECONSULTING.COM

CiviCRM Implementation Case Study

**LEUKAEMIA
& LYMPHOMA
RESEARCH** 

Beating Blood Cancers

Leukaemia and Lymphoma
Research

www.leukaemialymphomaresearch.org.uk

Parvez Saleh

www.vedaconsulting.co.uk

Previous Architecture

- Drupal Web Site
 - Bespoke Events Booking System
 - Online Donations
 - Not connected to CRM
- Export Web Participant registrations and import into CRM
- Export Web Donations and import into CRM
- External Payments Imported by Finance

Data Migration

- Large Data Set
 - 350k Contacts
 - 190k Participants
 - 1.2Million Contributions
- Conversion from CSV to CiviCRM down to under one hour
- Conversion run about 30 times prior to go live to iron out issues
- End to end data conversion under 2 hrs

Accounting Integration

- Largest part of development
- Primary goal to allow Financial System to reconcile income
- Finance control what is posted to Finance system
- CiviCRM is not an ledger based system
- Process of Batching Contributions and posting to finance
- Posted contributions Locked Down
- Financial Adjustments to posted contributions to reverse post correction to Finance.
- Tried and tested processes
 - Batching of Contributions
 - Posting batches to Finance
 - Financial adjustments for any posted contributions

Financial Imports

- Contribution files from external sources
- Import File
 - Summary of amount to be imported
- Validate
 - Verifies file format is as expected
 - Depending on file type finds link to contact
 - Produces exceptions page for those that could not match
 - Allows manual correction of allocation
- Allocated Batch
 - Following the import process an allocated batch is produced

Performance

- Dedicated Server 24GB RAM
- Additional Indexing for certain tables
- Modified Quick Search
 - Its hard trying to find someone when you have 350k + contacts
- Converted Drupal to InnoDB
 - We getting occasional site crashes due to locking issues with Drupal tables
- Pentaho Reports for speed and efficiency
 - Tuned SQL
 - Export different formats
 - Separate server serving reports

Success Factors

- Veda Consulting (Obviously!)
- Driven Implementation Team
 - All implementer's could see the benefit of CiviCRM and wanted to make the project a success
 - Change driven by Digital team
- Well managed organisation wide 'bug list'
 - There will always be issues, they need managing by the supplier and by the client.

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...Life Goes On

Thomas Muirhead

Head of Digital