



*Skeleton Key*  
STRATEGIES

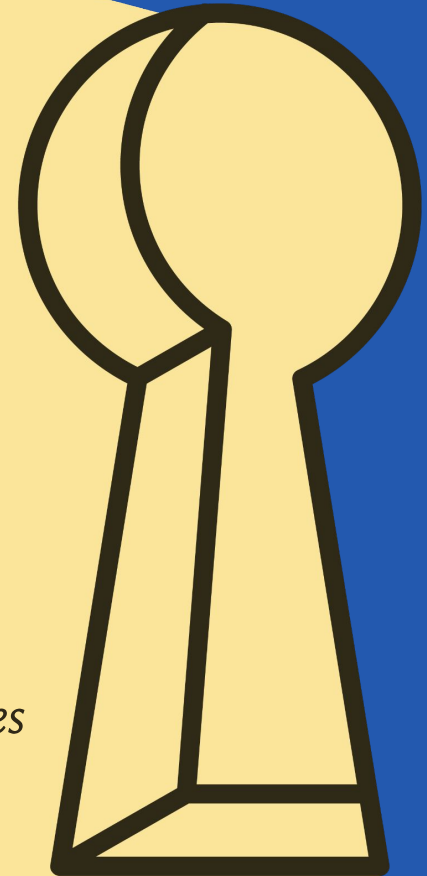


# BRIDGE THE GAP:

## Staffing Strategies to Unify Business & Tech Teams

*Presented by Devan Tucker, CRM Director, CARE USA  
& Justin Birdsong, Founder & Principal, Skeleton Key Strategies*

Collaborative Notes: [tinyurl.com/25ntcstaffing](https://tinyurl.com/25ntcstaffing)





Please note this session is being filmed and photographed for use on our website and social media, in accordance with NTEN and Baltimore Conference Center policies.

If you want to ensure you're not in frame, please sit toward the rear of the room.



**DEVAN  
TUCKER**

*she/her*

**CRM Director**



**JUSTIN  
BIRDSONG**

*he/him*

**Founder &  
Principal**

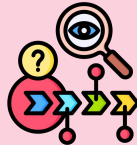
# Skeleton Key

## STRATEGIES

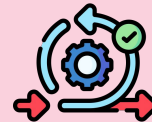
### WHAT WE DO



Guide tech  
strategy & data  
governance



Optimize business  
processes &  
operating models



Promote agile  
methodology &  
adaptive culture



Facilitate  
workshops &  
leadership  
development



Embed program  
management  
expertise &  
capacity

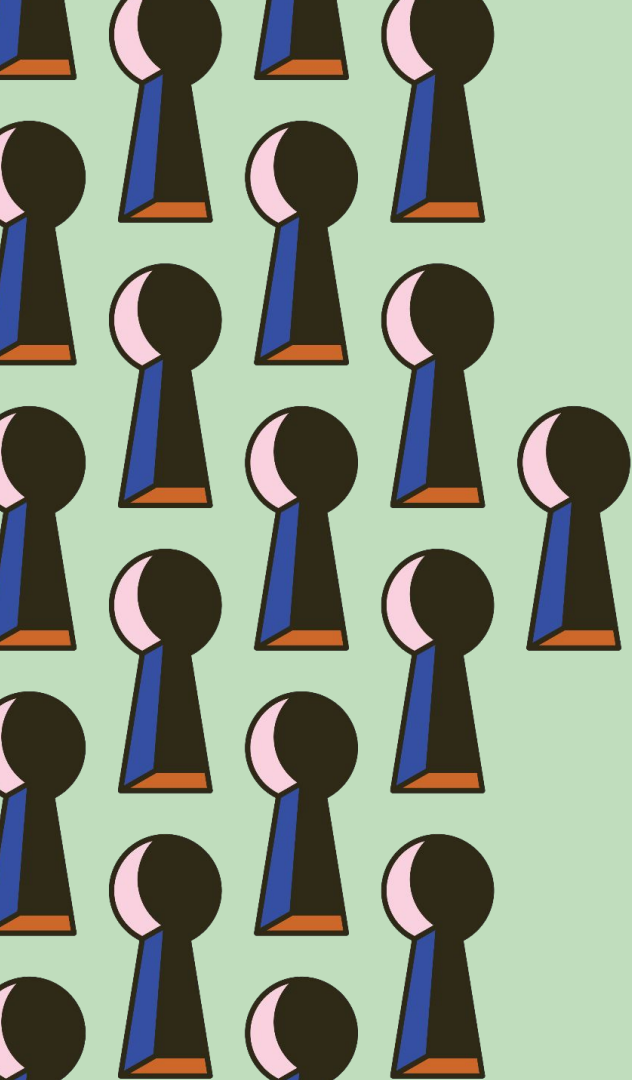


Support change  
management &  
training  
initiatives

*We thrive at the nexus of  
progressive missions, the  
humans who love them,  
and the tools they use to  
change the world.*

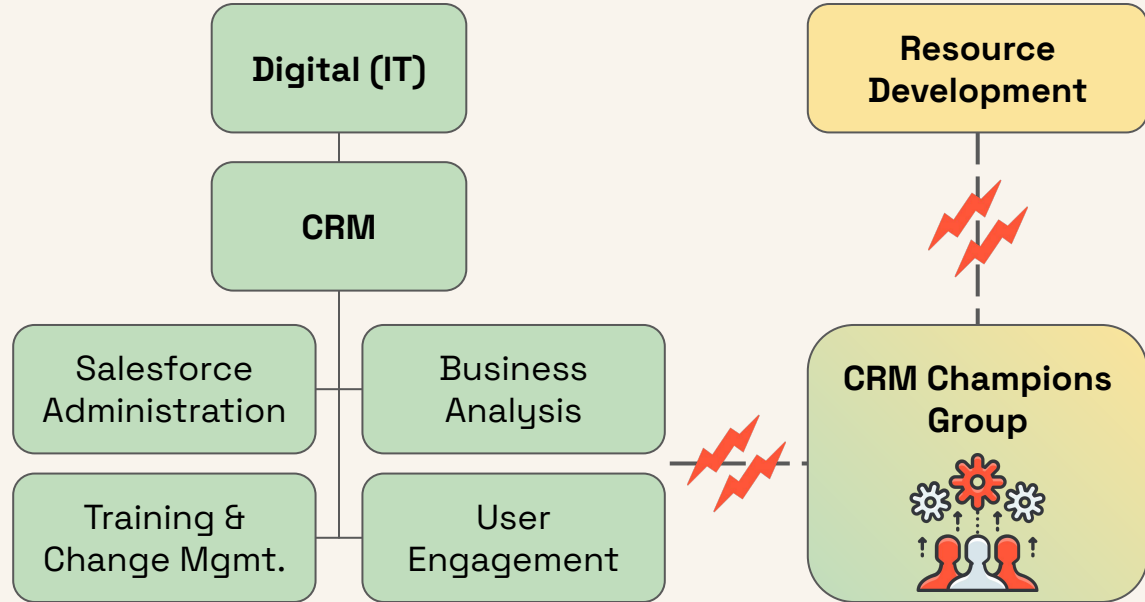
Learn more at  
[SkeletonKeyStrategies.com](https://SkeletonKeyStrategies.com)





# OUR CASE STUDY

# CARE CRM HISTORY



# CARE CRM HISTORY

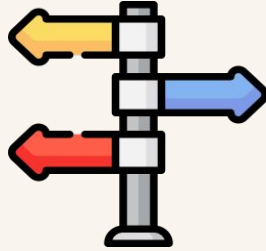


**Cake  
Byte**

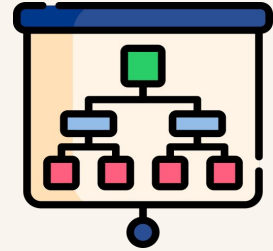
# OUR ENGAGEMENT



**Stakeholder Interviews &  
Organizational Assessment**



**Preview Directions to Align  
with Strategic Outcomes**



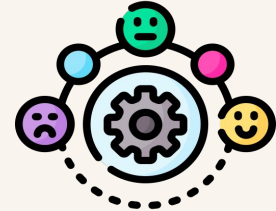
**Finalize Org, Workflow, Role,  
and Governance Models**



**Phased Read-outs of Findings  
& Recommendations**



**Draft New and Updated  
Job Descriptions**



**Transition with Change  
Management Support**



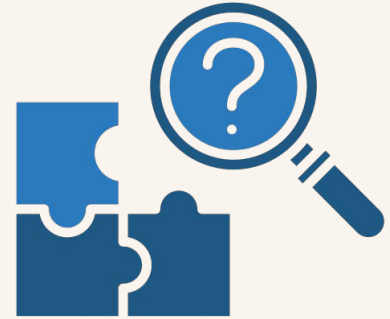
# FINDINGS: Outlining the Functional Gap



- 1) CRM team tasked with too broad a remit



- 2) Not enough dedicated business-side capacity or expertise



- 3) Missing “service bureau” functions that bridge the gap between Salesforce and user needs

# Strategic Direction of Travel



- 1) **Scope of Digital <> RD collaboration has outgrown the the CRM Champions alone, and needs structural support**



- 2) **Mindset shift: CRM team as strategic fundraising partner**



- 3) **Evolve CRM from product to program through agile**  
*Salesforce development aligned with fundraising processes and goals*

# DEFINITIONS: *Product vs. Platform vs. Project vs. Program*

## TECHNOLOGY

A **product** is a usable piece of software designed to meet customer needs. Products are typically built upon a **platform**, a foundational system for building, running, and integrating business applications or products.



*Nonprofit Success Pack (NPSP) is a **product** built specifically with the needs of nonprofits in mind on top of the Salesforce platform.*

*Salesforce is a cloud-based, **platform-as-a-service** solution that allows developers to build applications or products.*

## PEOPLE & PROCESS

### PRODUCT Mgmt.

**Product managers** are responsible for guiding the design, development, and production of one or more products. This includes:

- Evaluating customer needs;
- Creating a design that will address those needs; and
- Working with the teams who actually build the product to ensure that it meets the intended goal.

### PROJECT Mgmt.

A **project** is an initiative that is bound by a finite scope, timeline, and budget.

**Project managers** guide and empower a project team through the life of a project. They also create and manage project plans and budgets; keep team members accountable for their assignments; and report on project progress to stakeholders.

*Moving NPSP toward this:*

### PROGRAM Mgmt.

A **program** is closely linked with one or more org goals and consists of multiple interrelated projects.

A **program manager** is a higher-level variation of a project manager, with fewer tactical or admin tasks but with responsibility for cross-project integration and the success of the program as a whole.

# Recommendations for Cross-Functional CRM Collaboration & Partnership



- 1) **Salesforce is a shared resource, and it needs to be managed in partnership.**  
*More like 1 big team than 2 separate teams.*



- 2) **This model calls for a more highly integrated and collaborative way of working** *between RD and Digital.*



- 3) **The team who understands the business best should form the base of a cross-team support model** *that supports fundraising users and informs CRM feature, data quality, and training needs.*

# Org Model: Matrixed Development Systems Team + IT Technical Partner

## TECH MGMT.

**Digital CRM Team** is a technical partner for the DDS team, responsible for:

- Salesforce technical performance and security
- Evolving fundraising features using agile development approach
- Co-developing and managing long-term feature roadmap
- Troubleshooting integrations and technical issues
- Positioning Salesforce within CARE's enterprise architecture

## TRANSLATION AND ENABLEMENT

**Development Data & Systems (DDS)** is a new dedicated team that plays the role of CRM service provider to fundraising staff, responsible for all user-facing aspects of SF:

- Delivering responsive CRM user support
- Translating user needs into software requirements
- Aligning business processes with Salesforce capabilities
- Providing accessible, user-friendly systems training, delivered in business context based on real-life roles and workflows
- Creating actionable insights through reports and data quality initiatives

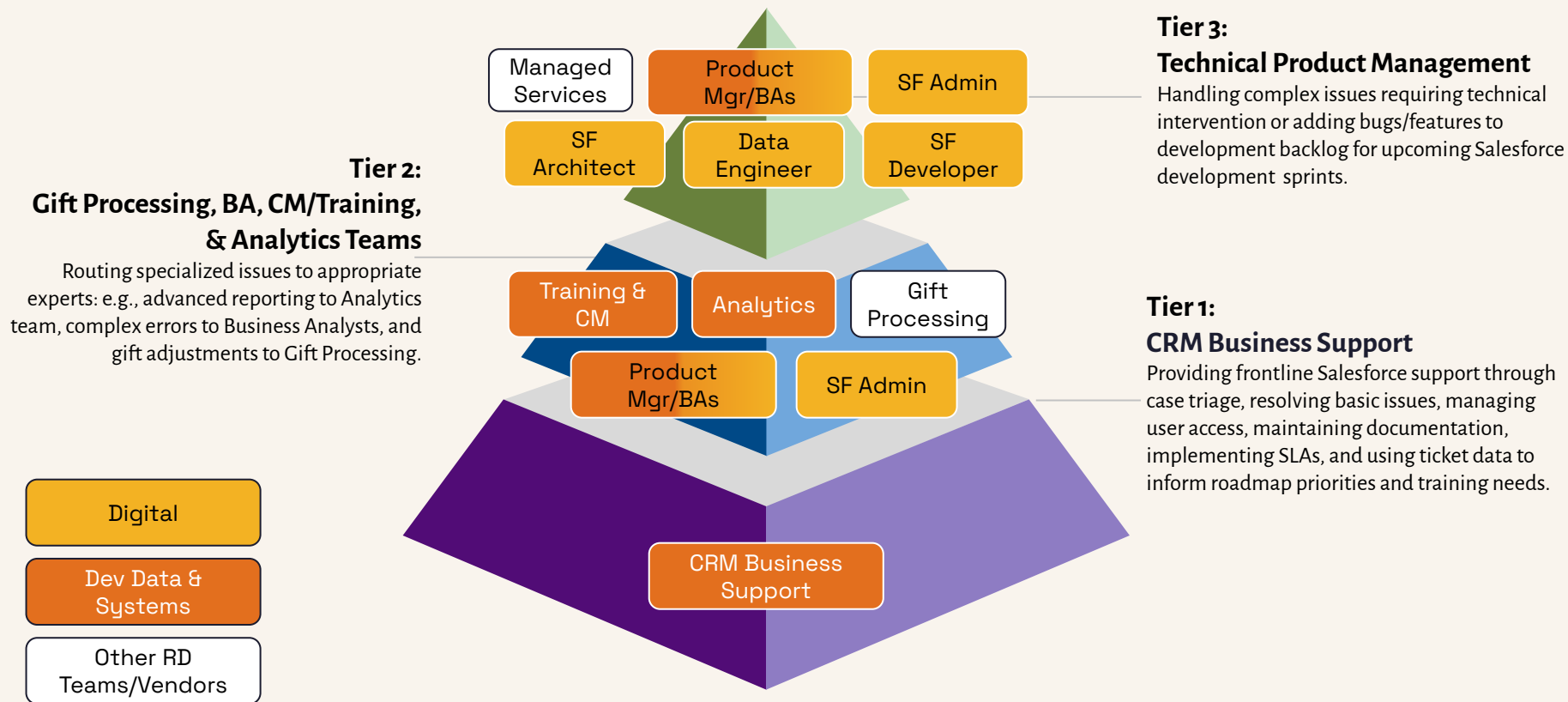


## STAKEHOLDER

**Resource Development** are the users/consumers of data/systems managed by Digital, responsible for:

- Setting strategic fundraising priorities
- Partnering with DDS and Digital to align tech roadmap with fundraising needs, and negotiating competing priorities
- Participating in system design and training
- Mandating Salesforce usage

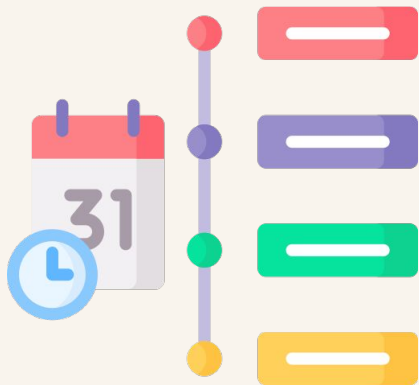
# Cross-Functional Collaboration and Partnership (in Detail)



# FLAGS AND SNAGS



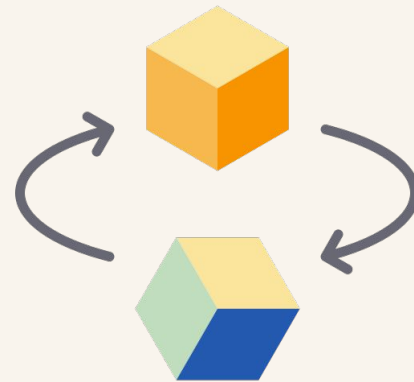
# HOW WE RECOVERED



- 1) **Phased out hiring timeline into a multi-year arc of change and investment**



- 2) **Prioritized the most critical role for quick wins** (*data quality, user support*)



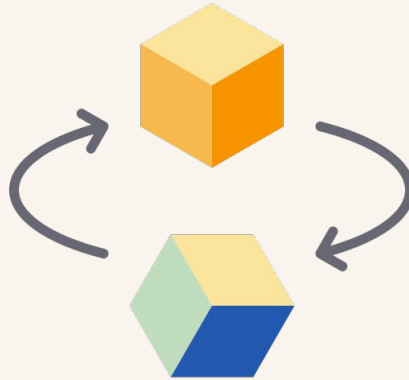
- 3) **Kept agile in order to meet our client where they were.**  
*We iterated as necessary to achieve a feasible go-forward model, and aspirational future growth scenarios.*



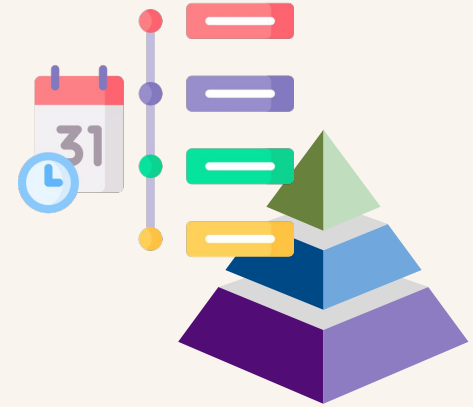
# TAKEAWAYS



**An operating model founded on joint collaboration and ownership of the CRM between Digital & CRM** *best aligned CARE to reduce system friction, increase adoption, and deepen the trust necessary to sustain a long-term partnership.*



**Your org design process needs to be agile, and your org designs need to be flexible** *in order to be durable and adaptable under in an increasingly unpredictable global climate.*



**Commit to an ongoing, iterative evolution of your processes, roles, and team structures.** *Unless you have substantial resources, it's likely that your journey is a marathon, not a sprint. Plan for multi-year phased investments and strong, proactive change management & comms.*



# Q & A



# THANK YOU!



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*Skeleton Key Strategies*