# TAILS FROM THE TRENCHES

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## Agenda

- Introductions
- Real-life tales
- Best practices:
  - Creating a streamlined support process
  - Educate on risk areas
  - Other "gotchas"
- Tips
- Your Stories and Advice Please
- Questions

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## Introductions - Confluence

- Mission:
  - To help our nonprofit clients achieve the greatest strategic value from their technology resources
- Founded 3/01
- Headquartered in Washington DC - "where the magic happens"
  - Field Offices in Baltimore, Los Angeles, and Portland, Oregon
- Worked with >750 nonprofits
  - 70% charities
  - 15% foundations
- 15 full time staff and another ~12 consultants

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## Confluence Practice Areas

- Open Source Design and Development
  - CiviCRM Implementation Specialists for over four years
    - Work with dozens of nonprofits
    - CiviCRM Implementations, Upgrades, Extensions, Ad-hoc Support, Training
    - And Now! Our First Core Module! CiviVolunteer!
  - Unusual depth in Drupal, Joomla and WordPress
  - Full graphic design / creative services team
- Technology Consulting
  - Overall Information Systems Architecture
  - Strategic Technology Assessment and Plan
  - Commercial / Open Source Software Selection
  - Many Other Areas – info sec; load test; tech eval

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## Small sample of our clients

- WateReuse Association
- DRCOG – Denver Regional Council of Governments – We make life better!
- LACBA – Los Angeles County Bar Association
- First 5 LA
- Greater DC Cares
- Premier Plantscapes
- National Women's Health Network
- Bikes for the World
- American Whitewater
- Choice USA
- NASUAD – National Association of States United for Aging and Disabilities
- We are Meals On Wheels Association of America – So no senior goes hungry.

CiviCRM for Nonprofits: #14NTCThink

Slide 5

## Why Me?

- Guess How Long?
- Providing support for CiviCRM for three years to scores of nonprofit clients
- Worked with 8-some Civi developers / experts
- You probably know everything I will say
  - Worth repeating?
  - You'll add to it!

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## Real-life Tales

- The badly customized implementation
- The “partner” in development client
- The “needy” client
- The “hurry up and wait” client
- Integration / Dependency on 3rd party systems / vendors

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## Real-life Tales

- Discovering a “bug” one year later
- Asking for ill-advised automation
- Forcing a budget in spite of unknowns
- Not wanting to pay for open source software “issues”; compromises in information security
- Outage from not paying their bills
- 24x7 expectations for support

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## Best practices: Creating a Streamlined Support Process

- Funnel all requests to single tracking system
  - Support "self service" by client / client portal
- Closed Loop
  - Client request triggers response
    - "We have received your ticket…"
- Request triggers:
  - Triage
  - Resource assignment
  - Initial estimate (budget and schedule)
  - Update to client

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## Best Practices: Creating a Streamlined Support Process

- Automated escalation workflow
- Closing ticket
  - Alert client
  - Record time
  - (Optional) client survey
- Goal: 0% clients asking for status
- Use data to measure and improve performance

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## Best Practices: Categorize Clients

- All and Especially Needy clients
  - Require controlled communication
  - No direct email / phone calls for single individuals
- Some want daily; weekly updates
- Some love talking on the phone
- Some need our help to manage their work

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## Best Practices: Educate on Risk Areas

- Scope creep
- Data Migration
- Third party extension quality
- Effort to figure out issue / estimate solution is 90% of solution
- Integration / Dependency on 3rd party systems / vendors

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# Best Practices: Other Gotchas

- Competing priorities
  - Satisficing
  - Getting the truth of the situation from client
    - "ASAP" as in right now, or "ASAP" as in "this week"?
  - Quickest time to get back in client court
- Single point of failure / hit by bus
  - Documentation
  - Two-person teams
  - Interim milestones that stand alone

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# Other Gotchas

- You Underbid
  - Stop Work ASAP and Share Bad News
  - Come Prepared with your Wherewithal
    - Split Cost
    - Not To Exceed "Donation"
    - Promise to do next upgrade for free

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# Expectation Setting
# Right from the start

- Open Source has bugs
  - Cost saved in no license are partially spent in maintenance and support
- Open Source requires maintenance and support like commercial software
  - 10% of implementation costs per year or more
- Open Source can change or sunset features
- Continued budget / investment
  - Enhancements
  - Upgrades
  - Traditional maintenance and support

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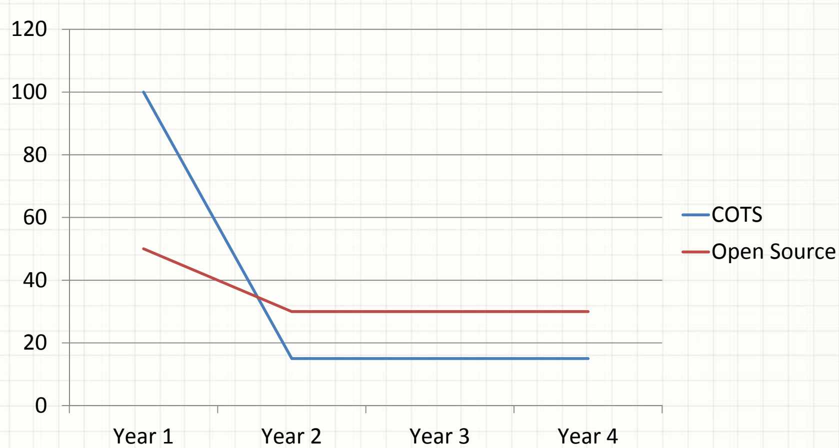
# Setting Expectations

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## Tips / Best Practices

- You can (almost) never over-communicate
- You get brownie points for responsiveness
  - Email is like mouse rewards
  - Clients are impressed with you are right there
- Phone calls for anything substantive and always for bad news

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## Tips / Best Practices

- "I'll put it on the schedule / calendar"
  - Reinforces that you have a schedule / other commitments
- "You gave us three things that need to be done ASAP – which should we do first?"
- Push back on inappropriate requests
  - Hour-by-hour updates
  - Onerous reporting requirements / exception-based

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## Tips / Best Practices

- Honesty is always the best policy
  - “What do I tell the client?”: The Truth
  - Take responsibility for mistakes
- Seek authentic communication
  - Not a “get rich quick” scheme
  - We are trying / here to help
  - Call them on bad behavior
  - Explicitly address problems / opportunities to improve relationship / Discuss the relationship itself

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## Tips: How to Address Common Situations

- Never overspend without advance notice
  - Or be prepared to not get paid
- Always provide options in advance
  - Goldilocks strategy
  - Do nothing
  - Do it badly
  - Do it right
  - Partially do it
  - Do something different

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## Tips: How to Address Common Situations

- Upgrade a heavily customized CiviCRM installation done badly by someone else
  - Identify all customizations
  - Create approximate plan for re-making
  - Review to determine which are (still) needed; which are worth the effort
  - Re-make correctly

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## Tips: How to Address Common Situations

- Expectation setting up-front
  - Potential black hole
  - 4 hours – 200+ hours
  - No guarantees
- Iterate:
  - Re-make a few, give to them to test while re-make some more

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## Tips: How to Address Common Situations

- Bug in the CiviCRM core or other third-party component
- Options
  – Contact developer(s)
  – Swap out component
  – Fix yourself; charge client
  – Workaround
  – Upgrade
  – Live with

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## Tips: How to Address Common Situations

- Prevention is 9/10 of the Cure
- Your Contract / Statement of Work
  – Arbitration
  – Service Level Agreement
  – Statute of Limitations for Bugs
  – Get out of Jail Free for Bugs Not Yours
  – Client responsible for all time spent to determine if bug is yours or not

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## Tips: Prevention during Execution

- Documentation for Scope
- Signed Acceptance for Key Deliverables
- Explicit Testing Period

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## Let’s Talk: Real-life Tales

- The badly customized implementation
- The “partner” in development client
  - Time and Materials only (extra to “help”)
  - Be clear on what is appropriate and what isn’t
- The “needy” client
  - Charge every minute
  - Document / report on every call / email
- The “hurry up and wait” client
  - Call them on it!

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## Real-life Tales

- Discovering a "bug" one year later
  - Sign off / Acceptance / Remind of warranty expiration
- Asking for ill-advised automation
- Forcing a budget in spite of unknowns
  - Make it really big? Best Guess?
- Not wanting to pay for open source software "issues"; compromises in information security
- Outage from not paying their bills
- 24x7 expectations for support

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## Your Stories and Advice Please

Questions