How to Choose a Database Management System:

A Primer

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Insource Services, Inc.
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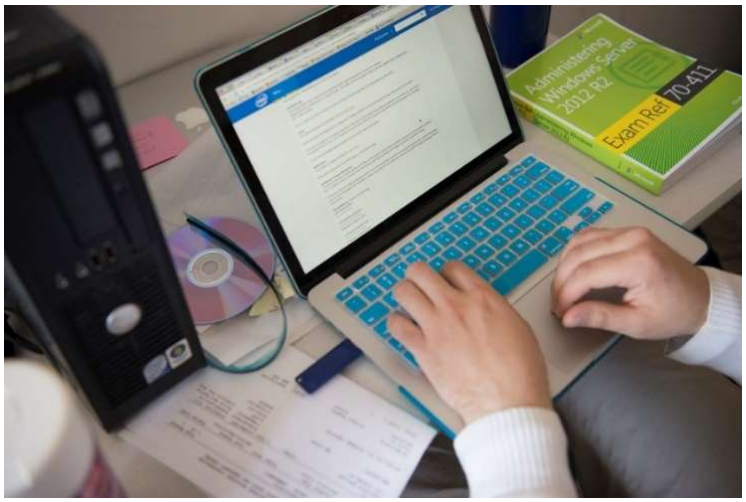
Agenda

- Who We Are
- Assessment
- Feature Requirements
- RFP Process
- Implementation
- Questions



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About Us: Insource Services, Inc.

At Insource, we believe that HR, Finance & IT start with people

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About Us: Insource Services, Inc.

What We Do:

- Full department outsourcing - generally part-time and long-term
- “A la carte” services
- Assessments
- Trainings
- Project/interim assignments

How We Do It:

- Seek to understand client businesses and mission
- Experienced, expert senior account leaders
- Account team with multiple skill levels; work is performed at the most cost-effective level
- Approximately 75 employees

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Database Management Systems – Question 1

Who here has a database?

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Assessment

Plan Elements

- Ownership
- Process
- Needs
- Governance
- Compliance and policy

What to Document

- Current state
- Desired state
- Gap analysis
- Next steps

501partners

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Assessment Kickoff Meeting

- Why now?
- What would success look like?
- What is the guiding purpose?

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Assessment – Ownership

- Responsibility
- Gatekeeper/Quality control
- Mission focused
- Liaison with consultants

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Assessment – Liaison Role

- At all meetings
- Internal coordination
- Trained up to be DB admins
  - Reduce consulting dollars

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Assessment – Process

- 5 why's
- Who/how is data collected
- Who/how is data reported
- Documented data flows

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Assessment – Needs

- Data requirements
- Reporting requirements
- System and IT Integration requirements
- Feature requirements
- Employee adoption and training requirements

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Database Management Systems – Question 2

How confident are you in the quality of your data?

- Does everything need to be imported?
  - Is there a predetermined cutoff point?
- Clean up the data before import
  - Who will do the cleanup? How much time is involved?
- Good data in = Good data out!

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Assessment – Governance

- Naming
- Required fields
- Data entry
- Access
- Policy and controls

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Assessment – Compliance and Policy

- Regulatory
- Organizational risk
- Needs vs convenience
- Ownership

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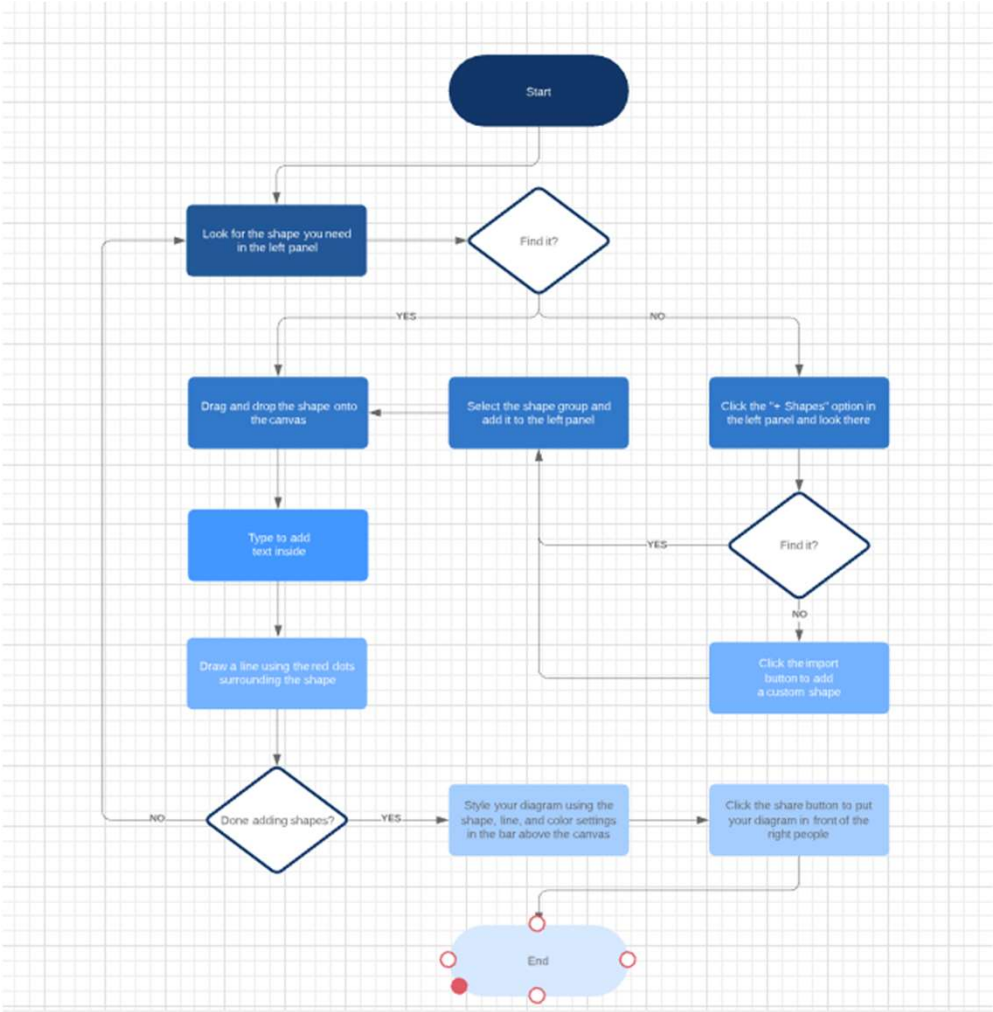
Assessment- Results



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Implementation

- Road Map
- Data integrity
- Governance

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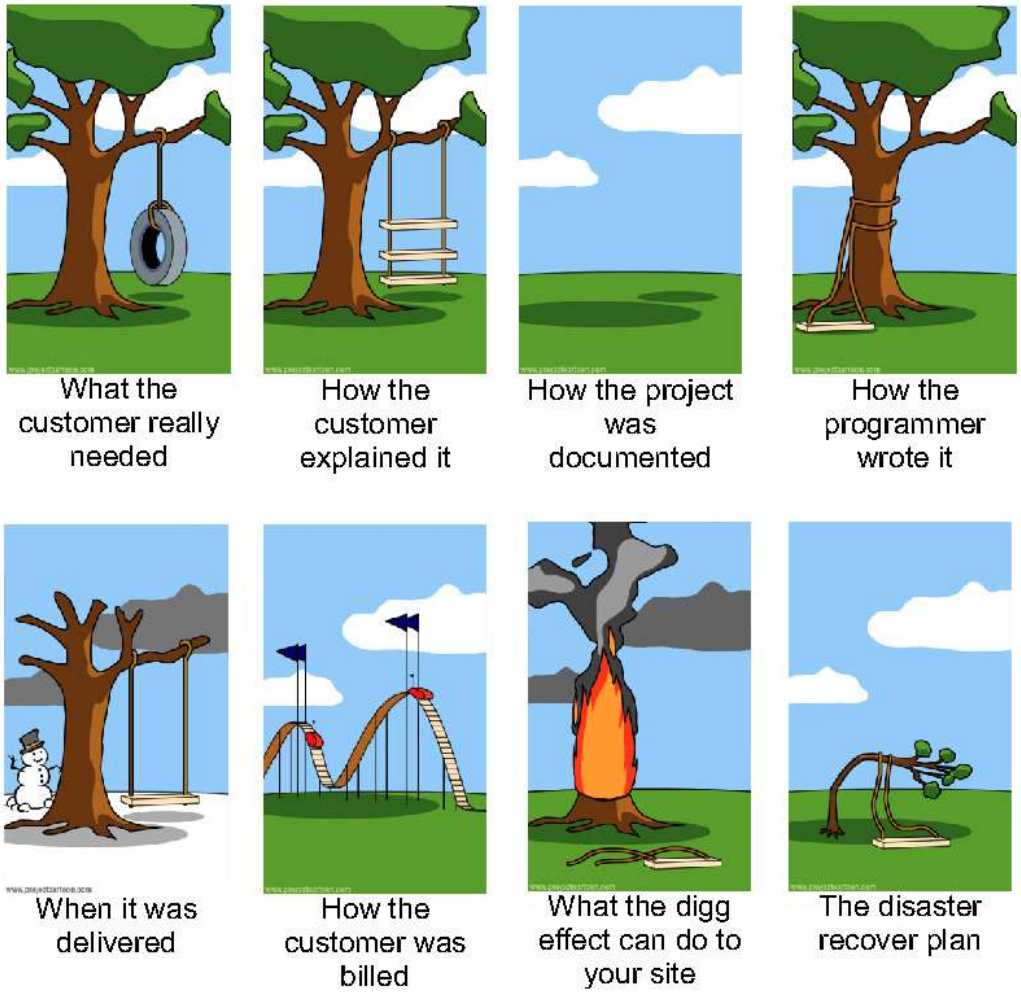
Implementation – Road Map



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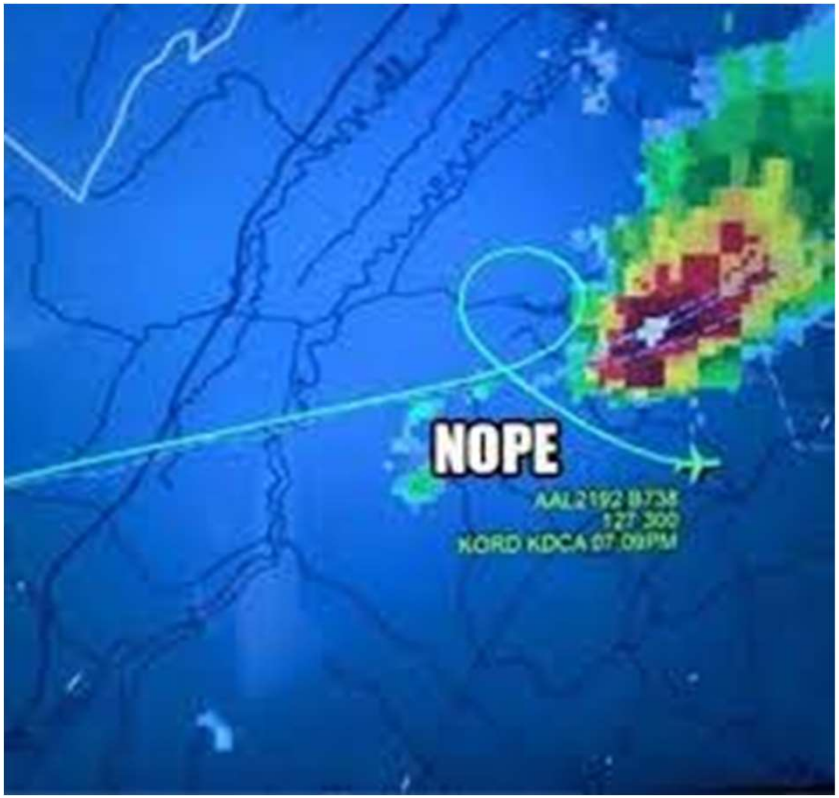
Implementation – Course correction

- Internal Project Management
- Consistent and frequent check-ins internally. Standing weekly meeting/call with vendor
- Requirements, build, test, train, test deploy, test, train



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Implementation – Governance

- Regular training
- Executive Sponsorship
- Annual review

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Training

- Power Users
- Staff
- Executives
- Onboarding
- Documentation

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Case Study - Overview

- Community Development Nonprofit
- 40 FTE's
- Multiple Programs
- Access Database for programs
- Excel and Google Sheets

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Case Study - Solution

- Salesforce for Fundraising
- Salesforce for Training Program
- Dedicated admin with senior oversight
- Google Sheets
- Box.com

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Summary

- Identify internal ownership
- Assess current environment
- Educate your organization
- Define updated processes
- Define Feature requirements
- Choose a vendor
- Take responsibility for implementation

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Summary

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Questions & Answers

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