Utilizing Technology to Advance Project Management: Insights from Jordan Valley Links

JORDAN VALLEY LINKS

Creating business solutions to poverty
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JVL Learning Series

The JVL Learning Series is an ongoing initiative to share lessons learned as the
project is being implemented. Topics include private sector engagement in
Jordan, client experiences with savings and loans groups, effective strategies
for enterprise development, measuring women’s economic empowerment and
utilizing modern technology to automate data processing.

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Jordan Valley Links

Enterprise Development for Women and Youth in the Jordan Valley

MEDA’s Jordan Valley Links Project (JVL) is working with civil society and private sector partners to economically empower 25,000 women and youth in the Jordan Valley and increase their contribution to Jordan’s economic growth. Women and youth are supported with training and mentorship to improve their business acumen and are linked to markets where they can sell their products and services. The project works in three sectors: food processing, community-based tourism, and clean technologies. To increase access to finance, the project brings together Savings and Loans Groups, which are self-replicating, member-driven groups that meet regularly to save small amounts of cash which can be lent to members. JVL is building support for entrepreneurship in families and communities through role models, gender dialogues, and communication campaigns to promote the value of self-employment for women and youth.

Figure 1: Overview of JVL Project
Introduction

This learning document outlines how the JVL project shifted from traditional data collection approaches and analysis, such as paper-based forms and excel tables, to an automated data management system. Peer organizations can gain insights from JVL’s experience on customizing a business-oriented Customer Relationship Management (CRM) system for NGO programming. Although the project only started working with CRM midway through its five-year life cycle, many key insights have already presented themselves in this short time. CRM is a rapidly evolving and innovating system. This paper intends to capture a snapshot in time of the JVL team’s use of CRM.

CRM stands for Customer Relationship Management, which is software that can manages a company’s interaction with current and potential customers. It uses data analysis about customers’ history with a company to improve business relationships with customers, specifically focusing on customer retention and ultimately driving sales growth.1 Although CRM was initially designed for businesses customer management, it can be adapted to assist not-for-profit and non-governmental organizations (NGOs) in two major ways:

- Learning and Accountability: CRM helps NGOs learn about their clients, including who they are and how they benefit from the NGO’s services. This allows NGOs to better anticipate their clients’ needs, level of participation and satisfaction.

- Organization and Management: CRM allows NGOs to become more efficient by organizing and automating data and processes, so for instance in one click, the JVL team can tell how many women and youth entrepreneurs applied for a project matching grant and how many have been vetted by the team. This allows for full and proper documentation and automation of all project processes, making these processes simpler and easier to understand for the users while ensuring higher accuracy.

The JVL project is still on a learning curve with CRM. After launching the system in year three of the project, JVL now uses CRM as a platform that brings together information on clients, stakeholders and other project entities. It ensures information is accessible to the whole team and provides comprehensive data on project progress towards achieving targets. Access to accurate, real-time data across the entire staff saves time, as everyone can see the same information, allowing better decision making and clearer communication. For example, JVL’s different sector specialists can all see data measuring their progress towards targets, and this data is also visible to the Monitoring and Evaluation (M&E) team, the senior management and support functions such as finance and human resources.

Now that JVL’s CRM is operational and populated with data sets, the team can use the information to adapt activities and inform operations. This can include:

- Capturing the clients’ and partners’ journeys from start to finish and detecting gaps or challenges in those journeys that need to be addressed.
- Documenting and understanding reasons behind client drop-outs from project activities in order to improve processes and ensure greater client satisfaction.

**JVL’s CRM Design**

- JVL’s CRM utilizes six separate entities: Dashboard; Contacts (client profiles); Accounts (businesses and partner organization profiles); Events List (client event or service being provided); Opportunities (applications and vetting process); and Grants (administered to successful applicants). Though the entities are separate, data flows from one to another automatically. For example, a client’s data will be entered into a contact card, and when they participate in project activities, their names will be reported on attendance lists gathered by implementing partners; their unique client ID links the contact card with the marketing / event lists and all the activity information can be viewed on the client contact card.
- As seen in the diagram below (figure 2), client profiles, business and partner profiles, and client events are used to store and reflect the services and benefits that clients receive from the project. Opportunities and Grants are used by the JVL Grants Management Team in the process of managing clients who apply for matching grants under JVL’s Business Plan Competition.

**Entity:** a feature or function on CRM to view progress towards key indicators. These are the building blocks of the CRM system.
Benefits of Using CRM

The information stored on the CRM system has been valuable for the JVL team in decision making and in identifying gaps in programming that could not be found with traditional M&E tools. For instance, traditional monitoring methods involve counting the number of people on attendance sheets, which makes it impossible to detect if those people are registered as project participants, as it is very hard to cross-check the names of attendees with those who are registered. Now, with the CRM system, it is possible to identify if benefited clients or attendees are registered and eligible for project services.
Since launching CRM, the JVL team has benefitted from: 1) Exceptional data management; 2) Streamlined Progress Monitoring; 3) Automated Data Processing for more Transparent Grants Management; and 4) Enhanced Identification of Program ‘problem areas’.

JVL’s trained enumerators help potential clients fill in a digital registration form as a first step to engaging with the project. The application is built and filled in using iFormBuilder software, a cloud-based mobile data collection platform helping customers around the globe collect data on their mobile devices. iFormBuilder provides the team with a comprehensive Excel dataset including all the demographic and personal data of the potential clients. The team cleans the data before uploading it to CRM where it is converted into contact cards for each client. A sample client card can be seen below (figure 3).

As the client’s journey with the project begins, the M&E team receives attendance sheets containing the names of all clients who benefit from different project activities. These attendance sheets are provided by the implementing partners in the field and uploaded to CRM’s Events List (client event or service being provided), which links to each clients’ contact card. The contact cards are directly linked to the dashboards, thus providing a live report and overview of the clients’ demographic information along with any events attended. CRM thus functions as an advanced and user-friendly data platform where any and all information related to a JVL client can be found by searching for the client’s unique national identity number or name.

Figure 3: Example of a contact card

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2 All CRM screenshots included in this document show ‘invented clients’ to protect data privacy.
Streamlined Progress Monitoring

From the start, the M&E team was keen to link its CRM data to the project’s overall results reporting frameworks. For example, the CRM client event list is linked to the project’s activity and outputs, as outlined in its performance measurement framework (PMF). Each event is thus linked to a specific PMF indicator with the aim of reflecting progress towards achieving its target. For example, all attendance sheets received after a financial literacy training can be linked to the relevant PMF indicator, which is measuring the project’s progress on “number of women and youth entrepreneurs trained on financial literacy.”

To maximize user experience, CRM data can be displayed using PowerBI dashboards, increasing the team’s ability to disaggregate, analyze and present

3 The Performance Measurement Framework is a tool used for Results Based Management. It is a table that presents an overview of a project’s expected outcomes, outputs and activities. Progress against targets are monitored by collecting data on indicators.
data. PowerBI is a user-friendly business analytics service with an interface simple enough for project staff to create their own reports and dashboards.

The dashboards below shows how many clients have benefitted from project services to date and measures progress towards certain targets. The dashboard can display data by geographic region, sector, type of event, implementing partner, etc.

Presenting two different dashboards below (one using CRM and the other using PowerBI) highlights the improved look and data analysis options when CRM is complemented with PowerBI. CRM allows effective integration across different software platforms.

Figure 5: The traditional CRM dashboard

Figure 6: JVL dashboard after exporting CRM data to Power BI
One example of how CRM enabled JVL to monitor progress more effectively was when a CRM dashboard revealed that a JVL partner was carrying out multiple training courses but only making progress against one capacity-building indicator from the PMF. Digging deeper, the team found that the partner was in fact conducting a variety of training courses that should have been coded and titled differently, and accordingly listed under different indicators; thus, showing progress against multiple project outputs. Since all the training had been entered into CRM under the same title, there were huge discrepancies in the partner’s progress reporting. Comparing the training numbers reported in that partner’s quarterly report with the numbers entered into CRM shed light on the problem and helped the team to highlight the importance of having unique titles and clear, brief descriptions of the content of each training with each attendance sheet. Identifying this problem also allowed the partner to discover and correct an issue that impacted on their financial report, as all spending was under one budget line instead of under multiple budget lines.

Automated Data Processing for more Transparent Grants Management

The project has a grants component which allows women and youth entrepreneurs to apply for start-up matching grants for their businesses through a Business Plan Competition. The project’s Grant Management team thus receives hundreds of applications that need to be screened and processed in a transparent and timely manner. All applicants have a client contact card, which gives the JVL team basic data (please see figure 7, step 1).

The JVL team conducts an initial filtering of all paper applications and then uploads only those applicants who meet the minimum criteria. These are then qualified as ‘Opportunities,’ which are client applications and vetting process (step 2). All ‘Opportunities’ then move through a pipeline where they undergo additional selection procedures such as making a pitch to a selection committee and undergoing a spot check from the grants management team. Successful applicants are awarded a grant (step 3). Once the contract is signed, the ‘Opportunity’ is closed by defining it as ‘Won’, and the CRM system automatically creates a new contact card or links it to an existing contact card (i.e., client). Through the ‘Grants’ entity, the project’s finance and grant management teams are able to oversee the progress of all successful grantees and can also keep information on all non-grantees for future reference, which are kept as ‘Opportunities’ within the system.
All JVL clients / SMEs / NGOs / Market Actors who are in contacts can apply for grants and once they apply, they become opportunities for the project.

The grantees are monitored by JVL using the grants entity to ensure proper operations and financial management.

Once applications are entered into the system, they become opportunities. The JVL Team then screens in the qualified applicants using a vetting process that includes idea pitching, spot checks, etc. Opportunities/applicants who meet the set criteria are then qualified to grants.

Figure 7: The general grants management process on CRM

Figure 8: Grant vetting process
Identification of program ‘problem areas’

As mentioned above, CRM dashboards can assist staff in identifying deficiencies in implementation, allowing timely action to be taken. CRM allowed JVL to identify a key issue in client mobilization and outreach. Shortly after implementing CRM, a comparison of attendance lists showed that names of clients benefitting from training were not always the same as those of registered clients. Specifically, the JVL team found that some clients who were registered and vetted to receive JVL services were not the same as the ones who were benefitting from project services, i.e., non-registered clients were benefitting from the project. It seemed that partners were not targeting only registered and vetted clients but also including other interested community members who did not fit project criteria, or who had not yet completed a project application. This issue was creating reputational risks for JVL: partners had conducted mobilization activities with hundreds of potential clients, but when these partners subsequently launched activities, different people received the services. Those who had already registered were sometimes left out, generating frustration and even resentment among those who had been mobilized.

Once this problem was detected, the JVL team engaged with its partners to understand the reasons for this discrepancy. Some partners had experienced high staff turnover, and newer staff members may not have understood JVL’s processes. Other partners had been prioritizing large-scale outreach, rather than targeting specific clients.

Subsequently, a decision was made to change the client registration process. Previously, targeted clients were registered during a community outreach and mobilization period, which could be a month or more prior to the first service or training provision. Now, registration is done on the first day a service is received. This ensures that no one is registered with the expectation that they will benefit from a service, but only registered once they get a service. To solve the issue of previously registered clients who had never received services, the project launched a campaign with partners to better target all the non-benefitting registered clients within a certain time period, or removed them from the project’s database if they ultimately did not benefit from any project services.
Key Lessons

Although the JVL team has made substantial progress in using CRM to advance its data management process, some aspects still pose obstacles in maximizing the benefits of its use. Some key challenges are outlined in this section, and possible solutions for any team experiencing these problems.

The need for more buy-in from the team

One of the most difficult problems during any technological adoption process is human resistance to change. In this case, such resistance was experienced by almost all members of the project team. This manifested itself in many different ways including an insistence on using the old project management tools; avoiding creation of and/or using their own dashboards; continued requests for support from the M&E team despite having access to the main dashboard; and a lack of follow-up with pertinent partners to ensure punctual delivery of high-quality attendance sheets (evidence-based data).

Potential Solution: The team responsible for CRM should establish monthly meetings in order to present the overall CRM dashboards and discuss project progress as a team. This allows every project manager to see how their particular sector fits into the whole project and ensures monthly feedback from their peers. The CRM team could also hold regular meetings with individual project managers as required, especially for those experiencing more challenges with technology adoption and use. The JVL team has begun these steps and hopes to increase broader project team adoption of CRM.

The need for full integration across all entities at onset

Initially, JVL adopted a simplified version of CRM, using a smaller number of entities starting with client profiles and client events. Additional entities were added over time, as more team members were trained and gained competency. While this allowed the team to gradually adopt the new system in manageable pieces, it also meant that no users had the full picture of the model at these early stages. In effect, the train tracks were being laid while the train was already on the tracks and moving forward. This staged adoption has likely limited the extent to which the system is used on JVL, as CRM is not fully integrated within the project team.

Possible solution: Better utilization of the entire CRM system is possible through two ways. The first is activating more available entities within the system to further improve data automation and data analysis, such as “Quick Campaigns” which helps projects in conducting promotional activities to advertise and/or share information on the project’s events and services. For JVL, using additional entities would require greater adoption of CRM among
team members, which would also require more staff to designate time to use the system.

The second is to push the boundaries of CRM’s capabilities. Data collection, in particular, is outside the capacity of CRM, at least as JVL has configured the system. In some cases, this may involve integrating external software. For example, JVL is currently gathering data with iFormbuilder and importing it into CRM, which requires several steps, including cleaning, validating with partners, and data mapping, to ensure data is imported to the correct location in CRM. Wider adoption of CRM systems, such as the CRM mobile app instead of iFormbuilder, would reduce these steps and increase automation, while ensuring more accurate and efficient collection of data.
Building in-house technical expertise

Initially, the JVL team lacked expertise to set up and develop the CRM system and relied on remote technical support from experts based at Headquarters in Canada. However, as the system became more established and the JVL team got familiar with the CRM's capabilities, it became ineffective and inefficient to rely on continuous external technical support for ongoing modifications of the system architecture.

Possible solution: The project should build the capacity of its local team on CRM Customization and Configuration and train staff, especially the M&E team, in this subject. This training empowered the JVL team to customize its CRM system to immediately respond to the project’s needs, explore new scopes of improvement, and integrate with other services for greater benefit. This in-house expertise made ongoing customization cost-effective and responsive to evolving project needs.

More training on the importance of providing high-quality and timely data

Most of the project’s implementing partners are unfamiliar with and unaware of automated data management tools and the overall value of systematic and accurate data processing for continual program improvement. As a result, they don’t fully understand the importance of providing the project with timely, high quality documentation, and believe it to be an unnecessary and overwhelming burden. For example, early attendance sheets included the bare minimum of required information – attendees’ first names and signatures were recorded, but other important information such as last names and contact details was missing.

Possible solution: Invest more time, training and other resources for implementing partners. In particular, pre-set templates improved and systematized the data gathering process. For example, the JVL team created a standardized attendance sheet template that included all necessary data and was easily uploaded to CRM. Partners were trained on use and proper completion.

Along with this, it is important to budget dedicated funds for both project staff and implementing partners to employ data management junior officers. In turn, the JVL team should train any data management officers hired by partners and ensure close follow up and mentorship of all data management staff members.
Additional steps to further maximize CRM utilization in project management

In the coming months, the JVL team hopes to continue maximizing CRM systems for greater efficiency and data accuracy. These additional functions may require broader staff engagement with CRM. The following steps are the team’s plan for the coming year.

Automating report submission processes

Currently, JVL’s reporting process involves the following steps:

- Partners send quarterly narrative reports to JVL ten days after the end of the quarter
- Several JVL technical staff (the technical lead and gender and environment cross-cutting specialists) then review the report and send it back to partners with questions and modifications
- Partners then revise and return the final draft to JVL
- Finally, the M&E team reviews and approves the report and notifies the finance team that the next financial installment can be transferred to the partner.

However, many of these stages could be automated, for greater coordination and better accountability. Under the ‘Grants’ entity, CRM can automate the submission and verification of partners’ financial and narrative reports by ensuring that they have been received and reviewed by all responsible staff members. Two weeks before reporting deadlines, CRM can automatically send a link to all partners with the report templates and due date reminder. The partner could then complete the templates online and send them back to the system, which can notify and track that the report has been reviewed and approved by each specialist. After obtaining all approvals, the project manager can release the financial installment, save the report on the JVL SharePoint4 and store the report under the “Grants” entity.

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4 SharePoint is a web-based collaborative platform that integrates with Microsoft Office and is primarily used as a document management and storage system.
Using CRM in campaigns and event management

Campaigns can be a vital part of JVL’s ongoing visibility strategy, helping to raise awareness of its unique market-based approach to alleviating poverty. There are many well-established organizations working in Jordan and their work is well-known, but JVL and MEDA are relatively new in this context. CRM can be a valuable tool to maximize outreach and deepen connections with important stakeholders by demonstrating successes to date and promoting upcoming initiatives. CRM can help JVL manage such interventions effectively by assigning tasks, tracking coverage, and measuring engagement. The JVL team can create custom segments of contacts for individual campaigns, enabling the project to directly target potential donors who may be interested in such types of intervention, or keep supporters/stakeholders of previous campaigns in the loop and let them know how their contribution is being utilized. For instance, if JVL plans to host an event, it can also take advantage of CRM event management tools, which allow users to plan events such as conferences and panels. Everything from booking venues, organizing sponsors, managing schedules and tracking attendance can be done through using “Quick Campaign” entity.5

5 For more information please visit https://www.youtube.com/watch?v=DAfIE-YS-W8
Activating the “Voice of the Customer” Entity

“Voice of the Customer” is an incredible CRM tool that would allow a project to create and send surveys to its clients in order to obtain relevant feedback. JVL currently conducts annual surveys and other as-needed data collection activities, but in addition to these, “Voice of the Customer” would allow JVL to conduct more frequent, rapid surveys to obtain client feedback on a more timely basis – such as immediately after an intervention.

Clients can easily take those surveys on their phones, on a range of platforms, including WhatsApp and Facebook. The feedback obtained from these surveys would help the project to know how the clients feel about its activities more rapidly and adjust and adapt activities on an ongoing basis to meet their needs or serve them better. The JVL team recognizes that surveys are important but needs to carefully explore how to leverage all the information in JVL CRM to create surveys and get the feedback they need to succeed and improve. By activating this entity, JVL can pull survey data, pipeline data and case history, and tie it all together to get the feedback and the results that the project is looking for with its clients.

Conclusion

After two years of experience and exploration, JVL has found that CRM is really a ‘one-stop shop’ for users, whether private sector businesses or non-profit organizations. It allows any organization to fully understand its clients from the first interaction through the last and across the organization. The CRM system allows for easy information tracking and sharing to ensure that each interaction with a customer is meaningful, productive, and pleasant. Any information you need to succeed is a part of your CRM environment. All you need is to know how to use it!

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