AMSSA®
Strengthening Diversity In BC

CLIENT MANAGEMENT SOLUTIONS FOR IRCC-FUNDED SETTLEMENT AGENCIES

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As a provincial umbrella association, AMSSA acknowledges that BC is on the unceded homelands of the First Nations who have stewarded this land since time immemorial. We recognize the privilege that we have as settlers on this land and acknowledge that AMSSA's operations is on the unceded traditional territories of the xʷməθkwəy̓əm (Musqueam), Skwxwú7mesh (Squamish), and Səl̓ílwətaʔ/Selilwitulh (Tsleil-Waututh) Nations.

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submitted to **Affiliation of Multicultural Societies and Service Agencies of British Columbia (AMSSA)**

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INTRODUCTION

The Affiliation of Multicultural Societies and Service Agencies of British Columbia (AMSSA) is the provincial umbrella association for agencies serving newcomers. The organization strengthens over 80 member agencies, as well as hundreds of community stakeholder agencies that serve newcomers and build culturally inclusive communities, with the knowledge, resources, and support they need to fulfil their mandates. AMSSA provides support to a broad range of settlement service providers (including settlement, language, employment, etc.) and other stakeholders in British Columbia (BC).

Our findings and insights were drawn from inputs collected via a 26-question survey sent on June 22nd and open until July 2nd, 2021, developed in both official languages, and shared with IRCC funded settlement provider organizations in BC. We also conducted several, individual 90-minute exploratory interview consultations with contributors who volunteered to delve deeper into their client management solution experiences.

Many IRCC settlement and integration funded organizations are embarking on their digital transformation journey and looking to implement new systems, or even replace and consolidate existing, aging databases. This report profiles 15 solutions available in-market used by BC agencies with the common features and capabilities of each viewed through a standardized lens. The approach involves less marketing and more actionable information. Interest from BC SPOs initiated AMSSA to seek funding from Immigration, Refugees and Citizenship Canada (IRCC) to conduct this report.

This report is targeted toward the person or department responsible for planning, securing, deploying, and supporting applications to serve newcomer clients. The goal of the paper is to help you understand the key considerations, concepts, platform architecture, and decisions that will be necessary on your CRM journey. Where possible, we will outline best practices to ensure successful deployments and high productivity for users using the platform.

Regardless of terminology – whether Customer Relationship Management (CRM), Client Management Systems, Case Management, Non-profit Software, Database Information Management Systems (DIMS), or Digital Business Platform – all are conceptually similar. Each provides a central database with a 360-degree view for every client interaction and serves to ease collaboration, streamline operations, and enable performance reporting. For simplicity, we will refer to all such systems generically as CRM throughout this report.

Client management and delivering human service programs are complex, time-consuming processes. Thankfully, there is an abundance of solutions available today. For those seeking to put manual workflows, countless spreadsheets, or ineffective systems behind them, this report should serve as a shortcut to accelerate your digital transformation project.

Onwards.

IRCC's Digital Mandate

Canada is expecting a significant surge in immigration applications once global travel restrictions begin to ease. With travel restrictions implemented to slow the spread of COVID-19, federal government employees in Canada and abroad are adhering to strict social distancing and remote working measures. The same can be said of immigration agencies with IRCC and provincial contribution agreements.

Nonetheless, IRCC continues to do its best to fulfil its mandate to temporary foreign workers, international students, visitors, permanent residents, citizenship seekers, refugees, refugee claimants, and Canadian citizens.

IRCC is working to utilize digital processes whenever possible to minimize the need for in-person or paper processes. This would not only protect the safety of IRCC and the public but could also result in more efficient and faster application processing.

As IRCC looks to support its own modernization efforts, we understand agencies funded by IRCC will also seek modernization in the following ways:

- Develop tools and technologies to rapidly increase operational capacity so it can handle current manual application processing challenges and the anticipated surge in applications.
- Develop digital tools to address new social distancing requirements by reducing the need for in-person meetings through digital solutions (e.g., online citizenship testing, settlement applications, and language and learning programs).
- Implement digital technology solutions for client management (CRM) systems.
- Identify how to automate certain processes so that immigration agents can focus more of their time on complex immigration applications.
- Incorporate data analytics solutions to provide insights on operational volumes and processing capacities so that IRCC can effectively respond to changes in Canada and abroad.
- Develop strategies and systems to strengthen technology security postures.

It is highly likely that Canada will see a major spike in permanent and temporary resident arrivals once the global health and economic situation improves. Prior to the start of the pandemic, Canada was welcoming record numbers of immigrants, foreign workers, and international students (source: https://www.canadavisa.com/canadian-immigration-visas.html).

By seeking to modernize processes using technology, IRCC and associated immigration agencies are in a stronger position to accommodate even more foreign nationals once the pandemic is over.

To that end, AMSSA's members seek to leverage a CRM system to address these modernization results as well as meet its own goals and objectives.

Common SPO Goals, Objectives and Challenges

Like many Canadian settlement agencies, AMSSA's members and IRCC funded Service Provider Organizations (SPO) are shifting from program-centric to a client-centric delivery model as part of greater strategic digital transformation initiatives. These initiatives are being accelerated due to the conditions related to COVID-19 with agency employees and volunteers working from home and causing more challenges and stress for providing client services remotely.

Working in new ways, such as a hybrid service delivery models, where services are split between in-person and digital/virtual delivery, places even greater technology demands for preparedness, data security and tooling to facilitate positive experiences for frontline workers and clients.

Increase Productivity – Every successful organization is continuously looking to improve employee productivity. One of the ways many uses is by improving the efficiency of client facing staff through CRM technology. Often cited data from Nucleus (Nucleus Research, Document O128, 2014, https://nucleusresearch.com/wp-content/uploads/2018/05/o128-CRM-pays-back-8.71-for-every-dollar-spent.pdf) reports that the average return on investment (ROI) from CRM is nearly $9.00 for every dollar invested. Though this number hasn't been updated by Nucleus since then, Dynamic Consultants commented on the evolution of the CRM market in 2021 (https://dynamicconsultantsgroup.com/resources/crm/roi-of-crm-2021), and calculated that this number may have increased to an average of around $30.48 for every dollar spent in 2021. When it comes to client service, CRM can streamline processes, eliminate menial tasks and employee effort, focus workflow activities, and deliver information with these functionalities: integrated client profiles, email and communications integration, mass outbound communication (email marketing, SMS, etc.), dashboards, task management, calendars and reminders, and mobile access. A survey question asked what was working well with their solution, one AMSSA member organization stated that executing monthly iCARE reports that previously took 5 to 7 days per month before implementing their CRM system; post-implementation, the same reports now take 15 to 30 minutes to process.

Enhance Client, Employee and Volunteer Satisfaction – Easing client intake, provisioning services and engagement within an agency, as well as across agencies was a frequent concern of project stakeholders. As clients frequently change location, moving to new areas and engaging with another agency, the need to share sensitive client information around programs, services, and interactions in a secure manner without "everything being everywhere" is a significant source of employee (and employer) frustration. With a properly configured CRM system, privacy and secure access to information can be leveraged both internally between service programs and between agencies if desired. The enablement of externally facing web portals would greatly ease the administrative burden by improving data quality and user satisfaction for all parties. Furthermore, employee and regular volunteer turnover strains onboarding efforts to train users on manual, human-workflows, and procedural efforts are ineffective and unmanageable.

Lower Costs – Members wish to the lower cost of program services delivery by increasing volunteer engagement, reducing admin overheads, eliminating data duplication, and improving data quality.

Increase Funding – Members are seeking better support when negotiating with funders and starting more fee-for-service programs. Developing self-sufficiency via internal self-reporting and trend analysis is not currently possible through data captured in funder systems like iCARE.

Reduce Risks – Government funding per client reductions, COVID-19 pressure on delivering services, increased immigrant, and refugee flow with Canada aiming to welcome 401,000 new permanent residents in 2021, 411,000 in 2022, and 421,000 in 2023 that requires streamlining inconsistent and inefficient processes with technology (IRCC, October 2020, https://www.canada.ca/en/immigration-refugees-citizenship/news/notices/supplementary-immigration-levels-2021-2023.html).

Accelerate Decision-making – Real-time reporting allows organizations to obtain analytics and reports on demand with customizable graphs, charts, dashboards, and presentation tools. These insights are a great way to encourage the use of data in decision making. Customizable dashboards and reports also improve the visibility of individual activities for capacity planning. Better program designs, driven by data, facilitate new and existing services against contribution agreements.

Common Challenges Expressed – Comments consistently voiced to us from this survey as well as other engagements with both associations and settlement agencies across Canada include:

- A wide-variety of applications are in use today – often with data spread across siloed solutions
- Lack of integration between applications, resulting in manual intervention, additional work, duplication of effort and redundant processes
- Incongruent, broken and/or inefficient workflows across lines of business
- Lack consistency in data capture, resulting in data quality issues
- Cost inefficiencies resulting from the use of multiple applications and systems (license, training, support and maintenance costs etc.)
- Time-consuming processes in place to adhere to funder requirements
- Inability to produce real-time reports
- Rearview mirror used to manage the business, not forward-looking
- Lack of resources and funding limits the ability to drive change
- Inability to transform current operations to enhance and improve service capacity

Over the past decade, digitalization has completely changed the way organizations' processes and workflows are carried out. The changing times call for modern methods of execution. CRM is a popular technology that has several benefits for organizations. Before we look at the potentially adverse implications of not adopting a solution to address the challenges mentioned above, let's first define CRM.

What's CRM?

CRM stands for customer relationship management. As its name suggests, CRM software is a system for managing relationships with your customers (aka: clients / newcomers).

For most organizations, their most valuable and important asset is the relationship with their clients. In the early days at many organizations, the details about clients – who they are, how they have interacted with your organization – are spread over many different places, or worse, not recorded anywhere at all, except for the Executive Director's brain, a case worker's inbox, the Program Manager's stack of spreadsheet(s).

As an organization grows, it quickly becomes necessary to have one central place where all this information lives. Otherwise, your team will be slowed down without quick answers to important questions. Where are our clients coming from? What services have they used over time? How do we get in touch with them? How much progress have they made towards their plan? How do they interact with our programs? What trends do we see of both increasing and decreasing service demands?

Newcomers feel the pain when your team isn't on the same page. From their perspective, they have a relationship with one organization, not a collection of different people and programs where the same information is repeatedly entered. Everyone on your team needs context about every client's needs, wants, and current state, so they can pick up the conversation where it left off. These are the problems that CRM systems are designed to solve. With one central place to organize all the details of your leads and customers, it's easy for everyone on your team to gain insight into the state of your business, and the status of every customer relationship.

One of the most important things to keep in mind about CRM systems is that ultimately, it's less important than the data you put into it. That's one reason to think of CRM as a philosophy and set of practices for recording data about customer interactions, not just a software solution you buy (or build.)

Do you really need a CRM?

It's a fair question. After all, you could have made it this far without one. Why go to the effort and expense of implementing yet another system?

Over the past two decades, we've worked with numerous clients across multiple industries and sectors. Drawing from first-hand experience, here are seven implications of running without a CRM.

1. No source of truth – Spreadsheets, inboxes, documents, and the many brains inside your organization. These are just a few of the data silos that exist in your business.

Data silos have many negative consequences on your operational efficiency and are difficult to overcome – especially when you're not using a CRM. After all, where do your people go when they need timely and accurate information? Their inboxes? Your shared network drive? Or, do they just call each other and ask for help? Without a single source of truth, your team spends more time looking for data than actually using it. Data should propel the organization forward – not create new obstacles. Without a central source of truth, the obstacles are plentiful (and costly).

2. You can't see the "big picture" – Successful leaders effectively use data to inform their decision-making. They also regularly set time aside to ensure data is timely, accurate, and, most importantly, useful. From incoming service requests to measuring the success of the newcomer's journey, data-driven metrics form the basis of modern management. Of course, it's hard to gain the necessary insights when data is spread all over the place. As a result, organizations that do not use CRM technology tend to rely purely on gut feelings as opposed to real-world performance metrics and forecasts. In short, you can't see the "big picture" when you don't know where to look—or what to look for.

3. Relationships are harder to understand – Stop and think about your ten most important client relationships. Where did these clients come from? Were they the result of a successful website search, or did they all come from word-of-mouth referrals? Now multiply the same questions across your entire client base. Sure, it may be possible that you have all the answers, but does the rest of your team? CRMs are built to help you track, understand, and strengthen business relationships. Features like record linking and advanced reporting help you and your entire team know – with certainty – the original source and impact of each relationship. Without a CRM, you're forced to rely on anecdotes, which become less reliable as you scale.

4. Less control over your data – Let's assume that you track all your customer data in a shared spreadsheet. Although better than nothing, spreadsheets have several shortcomings that limit the control of your data, including your ability to:

> **Restrict access to data:** You may be able to protect certain tabs of a spreadsheet, but within the tab itself there is less control. This becomes problematic when you need to restrict

customer data from specific users. Case in point, a teacher in the LINC program does not need to see the clients confidential profile details. Unfortunately, making this work in a spreadsheet is difficult — if not impossible.

Ensure data integrity: What happens when a user accidentally deletes a row in your spreadsheet? Days or weeks may pass before anyone even notices. Once the issue is identified, how will you know who made the oversight or how many other accidental changes were made? It's impossible to ensure data integrity with spreadsheets.

Maintain data compliance: We live in a world increasingly concerned about data privacy and security. Ensuring total compliance with regulatory and industry-specific guidelines is complex enough even when you have the right technology solutions. Spreadsheets and homegrown databases are not built for data compliance. It's just that simple.

5. Productivity issues – Your team can't be productive unless they have a clear understanding of what they're supposed to do. When delegations are spread across multiple inboxes, chat threads, and team collaboration platforms, staff become overwhelmed and feel unable to focus and make progress. Centralizing work into a CRM that's built for program delivery and service management alleviates this confusion, resulting in elevated productivity and motivated team members. And, since your CRM houses all of your customer relationship data, tasks and services can be easily linked to relevant records, providing an additional layer of transparency and accountability.

6. Confusion about what's *actually* happening – Speaking of transparency, do you know what staff are working on each day? Are they focused on the priorities that deliver the greatest impact? Without the right technology, it's difficult to know for sure. Integrating all your program data into a CRM provides much-needed clarity for your leadership team. Data-driven productivity reports provide instant visibility into who is getting the most work done – and identifies where additional supports and training may be required.

7. Bad data — The only thing worse than no data is bad data. Bad data comes in many shapes and sizes and from many sources. That's why fixing and preventing bad data is not easy — even with a well-structured CRM solution. Without a CRM, you lack a consistent format for collecting and organizing data, which makes your job even more challenging. For example, a CRM form can be configured to display an intuitive picklist to standardize the data entry process, reducing the potential for bad data, and enhances your ability to run meaningful reports and course-correct.

Implementing CRM may seem like a relatively low priority given all the other moving parts in your organization. However, maintaining the status quo can have lasting negative effects on securing future funding and holding back productivity and growth. Take time to assess your requirements, then seek out solutions that can easily adapt to your unique needs and help you reach goals.

Out of scope

Collection and analysis of licensing costs, implementation fees and customization are not within the scope of this report. Agencies should reach out to their shortlisted solution providers for current pricing during the CRM selection process. Additionally, no infrastructure, security or IT policy and procedures analysis of member organizations of internal systems was conducted.

Note: *AMSSA does not endorse or recommend any of the solutions profiled.*

KEY CONSIDERATIONS

Build vs. Buy

"Should we buy off-the-shelf software or build something custom?" It's an important question that will inevitably come up in many organizations – and more often, in larger agencies.

There are clear benefits and drawbacks to each approach, but which one is best for your needs? Buying the wrong software will slow growth and impact your current processes. Building the wrong custom solution can triple your costs and result in a bad product.

To make the right decision, you'll want to consider the following questions:

- How difficult will it be to modify your workflow to match or conform to a commercial application?
- How important is future flexibility to change and modify your organization's workflow?
- Does your workflow or process provide a strategic advantage?
- What are your time constraints for implementing a solution?
- What are your financial constraints?

While these questions are important to ask, your team should understand the advantages and disadvantages of building versus buying.

Building a Custom Solution	
Pros	Cons
Building custom software comes down to a few significant benefits for an organization.	While there are large benefits to building a custom solution, there are significant disadvantages.
Bespoke Customization Customization is the most significant appeal of building custom software – you have complete control! No need for workarounds, hacks, or unnecessary integrations: you define business rules and workflows and then integrate into your existing. The entire product is built around your specific requirements.	**Larger Upfront Investment** Custom software typically costs more upfront than off-the-shelf software products. This more substantial expense can be a deal-breaker for many agencies when deciding whether to build or buy. It may take a year or more to generate the returns to offset the initial investment, which may not be practical for many organizations.

Intellectual Property Ownership As many businesses grow, their processes and workflows change. With custom software, you own the product so you can change, modify, and grow it to fit your evolving needs. No constraints, licensing feeds, or restrictions apply when you own the product.	**Time to Build** Custom software takes time to build. While using an agile development process can get you initial working versions reasonably quickly, a fully featured product will take much longer to deploy. If your organization doesn't have time, a custom solution might not be the best choice.
Application Support With custom solutions, you have direct access to the software creation team. Whether a bug emerges, or changes are required, the team is available to support the needs of the business.	**Application Support** Your Internal IT /Training staff is required to train users and support the application indefinitely.
Ongoing Enhancements When your business invests in custom software, you don't need to rely on a software vendor's roadmap when you can define your own. You'll have the ability to get direct feedback from departments and prioritize features and enhancements based on your requirements.	**Ongoing Maintenance and Support** Staying current is challenging when business needs change rapidly and the applications integrated with your software release new versions that necessitate adaptations of your own software. Mobile support is expensive to update given its rapid release cycles.
Design and Branding Custom solutions allow you to own the entire product design. When you build your own software, you write the copy and messaging, and define the naming conventions and business terminology. The solution may feel more natural to your team, which means less confusion and more productivity.	**Building the Wrong Product** Many organizations invest a lot of time and money into building custom software but end up with the wrong product. This is a major risk when considering custom software. Even the best planned projects are susceptible to scope creep, going over budget, and past deadline.

As numerous specialized, commercially available CRM solutions exist for the settlement sector, there is likely a viable solution similar to what you may be planning to build from scratch. Unless you have a strong or unique use case(s) that sits outside of typical agency requirements, you may be wasting a lot of time and money by duplicating their work. Additionally, custom solutions rarely offer more functionality than commercial applications because vendors have had to solve numerous issues for multiple customers, learning, adapting, and evolving the solution over time. Moreover, vendors have significantly larger development budgets aligned and focused to producing software. Venturing out on your own also means maintaining internal technical resources, skill sets and learning curves, or paying an outside party to do so.

Buying Commercial Solutions	
Pros	**Cons**
There are many immediate and long-term benefits of buying off-the-shelf software.	While off-the-shelf products may be quick to implement and less expensive upfront, there are some downsides to buying software.
Faster Implementation The most beneficial aspect of buying software is the implementation speed. Most off-the-shelf solutions are immediately available. While others might take some time to configure and customize, they will be live within weeks. If the timing of a solution is urgent, then buying software might be your best choice.	**Limited Functionality** The single most significant disadvantage of buying software is limited functionality. Off-the-shelf software is often meant to be generic enough that any organization trying to accomplish a particular goal could use it. This is especially common when your workflow or process is unique or different than the conventional approach.
Lower Upfront Cost Off-the-shelf applications are typically much cheaper to buy and implement. There may be an upfront cost as well as a recurring monthly or yearly license fee. If budget is a concern or there's a lack of immediate resources, then buying software may be a more viable solution for your organization.	**Incompatibility or Custom Integrations** Off-the-shelf software may not be compatible with other software and services that you currently use or may require in the future. In some cases, you may need to build custom integrations or solutions which can be costly.
Ongoing Enhancements Most quality off-the-shelf solutions are continuously improved. The vendor will typically do research, get feedback, and test new features out to ensure they deliver value to customers. When you buy software, you'll have access to these new features and enhancements without much additional cost.	**Slower Enhancements** While many off-the-shelf software solutions offer a roadmap and access to newer features, their timeline may be slower and not share the same priorities as your organization.
Dedicated Support Commercial solutions typically have a dedicated support team to help onboard and support your team. While support may come at an additional cost, it can be very beneficial to many agencies, especially smaller agencies without in-house technical support.	

Add-ons, APIs and Integrations Many products have add-ons and integrations that further extend the scope of features. Some platforms have apps that you or third-party developers can build to add functionality not already built into the core product offering. Many solutions also have integrations into common third-party systems that your organization may also use.	
No Development Risk Off-the-shelf software has been tested and used by many other organizations. The use-cases, processes, and implementation pathways are clear and require almost no risk compared to custom software development.	
Community Many successful commercial solutions have a robust community of users, experts, and support reps answering questions and sharing ideas. These communities typically have wikis and question and answer forums to support users.	

On-premise and Cloud Deployments

Another aspect to consider when investing in a CRM solution is where your data and systems will live. The effectiveness of cloud computing solutions depends on how suitable they are to your organization's requirements**.** When selecting your CRM solution, one choice to make is whether to go with an on-premise or cloud delivery model. The debate on which of these two approaches is better is never-ending. Our goal as a buyer is to understand how each system works and what the major differences are. It will be easy to tell which option aligns with your needs.

On-premise – Refers to where the system is hosted at a physical location, such as in-house environment in your building or data center hosting provider, meaning that you have 100% control. Private ownership defines an on-premise technology infrastructure – tailored to the specific needs of your enterprise. However, the maintenance of this kind of infrastructure requires a significantly higher level of upfront investment as the organization is responsible for all server hardware acquisition, setup, licensing, and the physical facilities to house the infrastructure – be it a data center or broom closet (networks, HVAC, power, fire suppression) – as well as technical employees to manage everything.

Cloud – Setting up your systems in the cloud means that the data centers are virtual. Data owners can access the network remotely. A company must buy the services from a vendor. For smaller firms, the cloud is particularly attractive as it provides full functionality at a reasonable price as there is no upfront infrastructure investment required. Plus, cloud software is usually priced under a monthly or annual subscription package, covering training, support, and updates. Therefore, with cloud computing you get greater flexibility, time, and financial savings.

On-Premise vs Cloud computing Differences

	ON-PREMISE	CLOUD (Public, Private)
Deployment	Every resource is deployed within your infrastructure, within your own office building or data center accessible limited to your organization only. The enterprise will be responsible for maintaining and handling the related process.	Public Clouds, such as Amazon Web Services (AWS), Microsoft Azure and Google Cloud Platform (GCP), resources are deployed in the vendor's infrastructure and accessed by customers. In Private Clouds, resources are deployed according to the customer's need, often managed and controlled by the vendor and accessed by the customer.
Costs	The cost incurred is for the servers, hardware, storage devices, software, power consumption and space where your architecture is built.	In the Cloud you only need to pay for the resources you use. There are no maintenance and utility charges, no upfront charge, and no associated upkeep costs.
Security	Organizations who have sensitive personal data, like banks and government agencies, have either third-party or internal staff security using a wide variety of tools and technologies to protect the organization's physical and digital assets.	The secure environment is provided by the Cloud providers and/or CRM vendor. There is a broad set of policies and technologies provided by the infrastructure provider who takes care of data security. Nowadays, Cloud providers work to ensure better security and higher availability times.
Maintenance	The customer is responsible for maintaining the data center(s), server hardware and software, networks, backups, storage devices, and disaster recovery.	Cloud computing provides greater flexibility as the user/organization only pays for what they use and can easily scale to meet the demand cost-effectively.
Flexibility	The ultimate in freedom to implement infrastructure changes whenever necessary; however, the organization also absorbs the full costs.	You can quickly modify your infrastructure to your needs without having to make large investments in costly hardware every time.

Even with all this information, nobody can say outright that one approach is better than the other. In fact, many organizations will have some mix of on-premise infrastructure (PCs, wired/wireless networks, etc.) with a wide-array of cloud-delivered solutions. So, when choosing between a cloud or on-premise CRM solution, it's a matter of what works best for your agency. For instance, if you need a high level of control and have the necessary (and available) technical personnel then an on-premise deployment could the most sensible choice. However, if your agency is smaller, has a limited budget, or is rapidly scaling then the cloud is typically more practical and cost effective. Analyzing the needs of your agency is the best way to make the best decision.

Product, Platform and Hybrid Solutions

The use of software for improving service delivery, task coordination, streamlining operational processes, and data management inside organizations is nothing new, but increasingly important in our modern digital universe of hyper-connectivity. So, what's the difference between a product, a platform, and hybrid solutions, you ask? Good question: the terminology can be confusing. Let's start by defining them.

Software Products - In simple terms, a product is a set of software features from one company that comes packaged as a single solution. Commercial applications (software products) delivered over the public internet cloud (public/private) are called Software-as-a-Service (SaaS) solutions.

A classic product example is Microsoft Word. Also referred to as commercial off-the-shelf (COTS) applications, a software product or product suite contains everything bundled within the solution designed to work together intimately. A product suite like Microsoft Office contains several bundled products: Word, Excel, PowerPoint, OneDrive, Teams, SharePoint and Outlook. However, it can be challenging to add or integrate new tools that didn't originally come with the original product/suite or those made by other vendors. Moreover, many do not include the necessary plumbing to allow data to be passed between products.

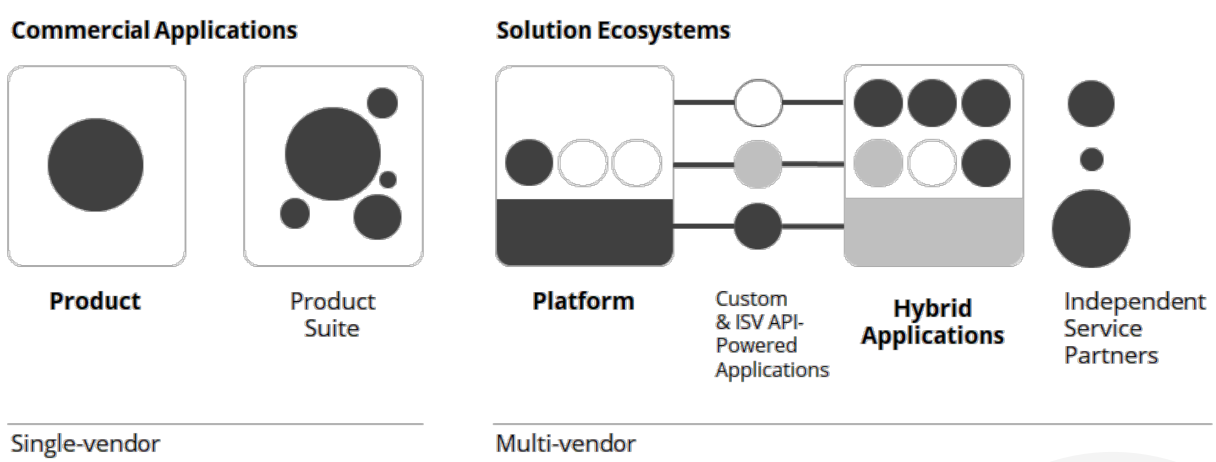
Some products offer Application Programming Interfaces (APIs) to enable connections to be made programmatically with others, using custom code or third-party middleware, though unfortunately many do not. In this scenario, the extent of integration is limited to manually import/exporting data using spreadsheets and storing data in open file formats like XLS and CSV. This is why such products or suites are considered proprietary or closed systems. IRCC's iCARE system is a notable product delivered via the cloud that lacks an API, making "automated bulk uploads" ironically, a wholly manual process.

Technology Platforms - One answer to the constraints of products, or even an integrated product suite, is opening your options more widely by using a technology platform. A platform doesn't try to do everything itself, but instead provides a foundation on which many other more specialized products can be stacked. Platforms provide a framework for multiple applications (products) to be created either internally by the organization themselves or acquired from providers who develop and market solutions to run on top of a platform. We call these solutions Hybrids.

Two famous platforms are Microsoft Windows, the desktop computer operating system, and Apple iOS mobile devices (iPhone/iPad). These platforms enable millions of independent developers to create their own unique software products using a shared technology base that deals with hardware operations (CPU, memory, battery) all the way to software marketing and distribution through their respective app marketplaces.

To the untrained eye, a platform may initially appear suite-like, as both provide a wide collection of features out of the box. But unlike a closed suite, a platform is inherently open, making it available for partnerships with companies that may not even exist yet. By making it easy to swap out or enhance features you find outdated or too simplistic in the package of a suite, a platform broadens your technology ecosystem by way of integrating evolving third-party and custom components. A platform is more than a starter collection of disparate features. Typically, a platform has one primary purpose that can serve as a foundational service or master data repository that other software and services can leverage.

Platforms provide core technologies creating a scaffolding to construct applications, like user security and authentication, role- and permission-based access, structured database storage, unstructured file storage, user interface frameworks, reporting and data integration capabilities from simple data import/export functions to real-time API data access.



Hybrid Solutions – These offer the best of both worlds: one part platform, with one to several applications, plus the ability to connect other third-party ISV solutions. We believe this approach is the future of application development given the on-going global shortage of professional software developers.

With a platform as the foundation of your organization, and unlimited applications that can be made practically by anyone, it addresses a very real concern many agencies share: the dependency on a product or single vendor may be both a blessing and a curse. Great if the vendor is responsive and develops their product roadmap, aligned with customers' needs, but unfortunately businesses go out of business and products are retired at the end of their lifecycle. While the same holds true for platforms, the billions of dollars of investment fortify the multitude of applications and partners, providing greater resilience.

Adding new applications as your organization evolves, at any time, without having to start from scratch, opens the door to new vendor relationships and product offerings – a significant, undeniable benefit. Diversity improves the whole.

Applications developed for a platform cannot operate without the platform also being licensed and operational. Some vendors may provide platform licensing with their applications, while others do not. The platform may be licensed directly, or separately by the platform vendor or the platforms' licensing partners.

Hybrid solutions enable data to be more readily available throughout your organization across departments and product boundaries. They also enable non-developers to create and maintain advanced, interconnected ecosystems of systems. Low-code and no-code software platforms like Appian, Salesforce and Microsoft Dynamics are enabling a new wave of "citizen developers" to construct their own applications much more readily than resorting to expensive custom software development. Hybrid applications from third-party, independent developers are now just entering the market. They alleviate the agency from starting on a platform without settlement-specific application functionality. Instead, many of their needs can be met quickly and cost-effectively, plus they offer the ability to customize as needed to meet their own special requirements.

Another claim by Nucleus (Nucleus Research, Document S148, 2018, https://nucleusresearch.com/wp-content/uploads/2018/09/s148-Microsoft-Dynamics-365-delivers-16.97-for-every-dollar-spent-2.pdf) "In analyzing the results of Microsoft Dynamics 365 deployments, Nucleus found that for every dollar spent, companies realized an average of $16.97 in returns. This is significantly higher than the average for both enterprise resource planning (ERP) and customer relationship management (CRM), which deliver, on average, $7.23 and $8.71 respectively. Nucleus found that companies taking advantage of Microsoft's investments in cloud and usability, as well as integration and analytics, were able to achieve significant returns by increasing productivity and revenues and reducing costs." We believe similar results may also apply to competitive hybrid solutions as they are based upon the same technology strategy.

However, for clarity, hybrid solutions aren't the end-all be-all. Applications developed for one platform are not magically cross-compatible with other platforms, even those from the same vendor – Apple iOS mobile applications do not work on Apple MacOS desktops, for example.

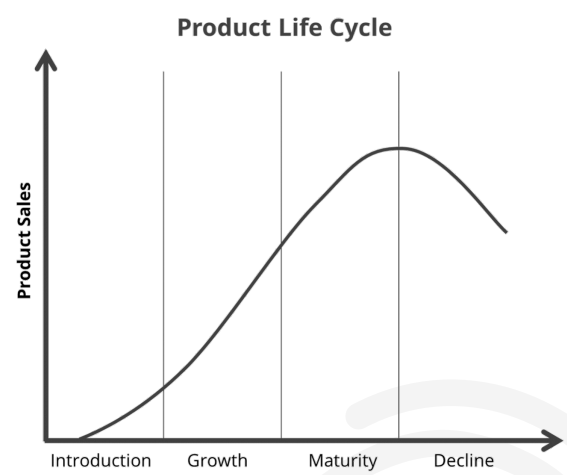
Survival of the Fittest (Adaptable)

An additional benefit of platforms and hybrids are the ecosystems formed with a wide variety of available options, both implementation service providers as well as third-party ISV solutions. This is the benefit of partnership strategies. Multiple sources of funding, relentless innovation with competition within markets provides far greater optionality and higher survival rates when compared to single-vendor products lacking such partnership ecosystems.

This is not to say that all these options will fulfill every requirement; however, it provides some risk mitigation should a single-source product vendor, or independent software developer, discontinue a product or go out of business. This scenario happens more often than people would like to admit. Two agencies reported being forced to find new solutions when the lead developer disappeared. However, the reality is that careers change course, people move away, technologies become obsolete over time. As the expression goes, nothing lasts forever… nicely segueing into our next topic.

Product Life Cycles

The Product Life Cycle model breaks down the various stages of a product's evolution, from its debut to its retirement. Each phase comes with its own characteristics, demands, and challenges. All products travel through various stages during their existence, and the product life cycle breaks these down into specific phases with distinct characteristics. Although there are many versions and variants, the typical product life cycle consists of the following five periods: Development, Introduction, Growth, Maturity and Decline.



For this report, we are simplifying the model to four stages, each solution has evolved past its initial development and notably none of the solutions reviewed are currently in Decline. During the final phase of the product, usage drops off as product demand ebbs. This may be due to the driving motivation for the product fading from importance in the market (and thus a smaller overall market for the product) or a replacement product/technology encroaching and stealing market share.

Introduction: The product is in the introduction phase from the debut of its Minimal Viable Product (MVP) and is starting to gain traction in the market. The solutions reviewed are typically under two years old and have a handful of customer implementations.

Growth: A product transitions into the growth phase once it achieves product-market fit. At this point, the focus is on rapidly growing the user base with a focus on customer acquisition and rounding out the feature set to have a complete offering. Of the solutions reviewed in this stage, most have been in the market for 2 to 7 years and may still be evolving and developing major new features and capabilities.

Mature: As growth slows down, products reach their third phase of maturity. The emphasis begins shifting from customer acquisition to retention since the pool of potential new users is overshadowed by those already using the products. Account management and customer service are of particular importance during this phase, while product development focuses on scalability and extending the product into complimentary/ancillary domains to maintain usage. Of the solutions reviewed, most have been in the market for 5+ years.

Every product starts at zero, reaches its zenith, and eventually declines, if not completely ceasing to exist. Progressing along this curve may take months, years, or even decades, but no software product can escape it completely. Awareness of which stage a product currently occupies is essential, as this phase informs buyers of where the solution currently is within its lifespan.

Workflow and Process Automation

One of the most helpful features of a CRM solution is workflow automation. Workflow automation options empower organizations to streamline their processes. It also allows employees to move from one manual step in a process to the next with minimal friction and stress. When it comes to organizing daily activities, very few solutions can beat the positive impact that workflow automation offers.

Essentially, workflow and process automation provide organizations with a way to accomplish repetitive tasks in an efficient manner. By leveraging self-operating processes that run manual tasks, agencies can save time, energy, and expense. In a well-designed workflow, work essentially flows from person to system to person and back again – without bottlenecks, breakdowns, or errors. Manual, time-consuming tasks can be transformed into automated, self-operating processes that free your staff for higher value tasks that propel your organization forward.

> "The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency." – Bill Gates

Usually, implementing workflow or process automation will involve identifying what areas need workflow improvement. Even with that, the targeted processes must often be optimized first to ensure that the addition of technology will have the desired effect.

Workflow automation can liberate any team from the burden of manual processes. Benefits include:

Fewer redundancies: Certain tasks are redundant because they involve processes that are unnecessarily repeated. Implementing an automation plan for these tasks helps spot redundant activities that take up time and waste productivity. For instance, integrating your data entry into an automated system reduces the number of times that information must be rekeyed. This eliminates duplicated effort within an organization and enables streamlined workflows.

Improved communication: An automated workflow can enable better communication across several departments, and with clients. It creates improved strategies for internal business communications by including functionality that allows different employees stay in touch as each phase of a project is completed. This helps avoid duplicate communication that could potentially overwhelm your clients. It can also deliver enhanced client relations by capturing useful information from previous contact with a client. Or, when referring clients to other service providers.

Error reduction: Most of the tasks that are commonly automated include the possibility of error. Workflow automation cuts down the possibility of transcription errors that often arise when data must be entered more than once. Since data will only be entered once within a workflow, it will be easier to ensure records are accurate for current and past transactions.

Cost savings: With less employees involved in low-value mechanical tasks, organizations can direct resources towards higher-yield activities and service engagements. This saves the time and cost that would have been spent on those employees handling repetitive tasks and removes the need to hire extra personnel to handle additional tasks.

Increased productivity: By eliminating unnecessary paperwork and freeing up employee time for other activities, your agency can become more productive. Templates and forms can be used to deal with repetitive documentation requirements. Your workflow automation can include customizable templates that are used to manage tasks along the workflow. Eventually, your business can save time and resources, which can be put to better use.

Enhanced strategic planning: Along with their capacity to complete tasks in record time, automated workflows can collect information on service delivery. This data can be used to assess organizational performance and will provide actionable information on its' strengths and weaknesses. This helps you make the most positive and progressive decisions on the future of your organization, backed by accurate data.

The primary goal of workflow automation is efficiency, and every organization can use more of that. It aims to achieve tasks in an efficient manner that produces more consistent and accurate results. If your data entry process is largely manual, and managed with spreadsheets or email, you face the risks of costly errors. If your agency has a series of repetitive tasks to implement, more than a few employees and lots of clients, you may wish to consider workflow automation a key requirement in your CRM selection.

Business Intelligence: Data Reporting to Analytics

Reporting is a key requirement of any organization. Its function is to provide users and management with information that allows them to make informed decisions. IRCC funded service organizations are required to perform routine metrics reporting via the iCARE bulk upload process. In fact, it is often the main driver of implementing an CRM system to manage clients and services delivery.

In recent years there have been significant developments in the reporting field which allow for a richer discussion about what can be delivered. Any information system will include a basic reporting component as part of its feature set. Some CRM systems include embedded analytics or allow external tools to provide advanced capabilities. Organizations typically have both needs whether they realize it or not.

The different roles of reporting and analytics can be defined as:

> **Reporting** shows you **what** has happened so far and what the status of that thing is. Reports often use standard or well-known formats to help people do their jobs better or more easily on a daily (or weekly, monthly, etc.) basis.

	Reporting	**Analytics**
Purpose	Shows **what** is happening	Explains **why** it is happening
Tasks	Organizing Formatting Summarizing	Questioning Interpreting Exploring
Results	Results are **pushed** to users for review	Users **pull** results to answer questions
Value	Translates **data** into **information**	Offers **insights** and recommendations to drive **action**

> **Analytics** shows you **why** things happened and how to improve business performance in the future. Often using multiple sources of data, Analytics lets you discover data relationships you never knew existed and explore new possibilities.

Examples of financial reports commonly include income and balance sheets, cashflow statements, aged receivables, etc. Reports such as these are bound by the parameters under which they were designed. That in-and-of itself is not a problem, but it does create a situation whereby their usefulness is limited. At the time that a report is initially designed, it is done so under 2 constraints:

1. By the dimensions that are available within the system, on a computer screen or page of paper (i.e. rows and columns), and;
2. By the knowledge and beliefs of the report writer/consumer as to what information it is possible to deliver via a report.

Because of these constraints, reports tend to throw up just as many questions as they do answers. For instance, a performance report that shows overall service demand is down would usually generate these subsequent queries:

- Are we down against plan/budget? against same period last year? or both?
- Are all services down or just at a particular location or program?
- Does the downturn affect all programs or just certain ones?

And of course, once any subsequent queries are answered, they will throw up their own subsequent queries:

- Case worker A's overall activities are up but what outcomes are being achieved?
- Client B's overall support from us is higher than it was last year but to what services attribute that increase?
- Referral to SPO C hasn't been followed up on: is this a one-off situation or a historical pattern?

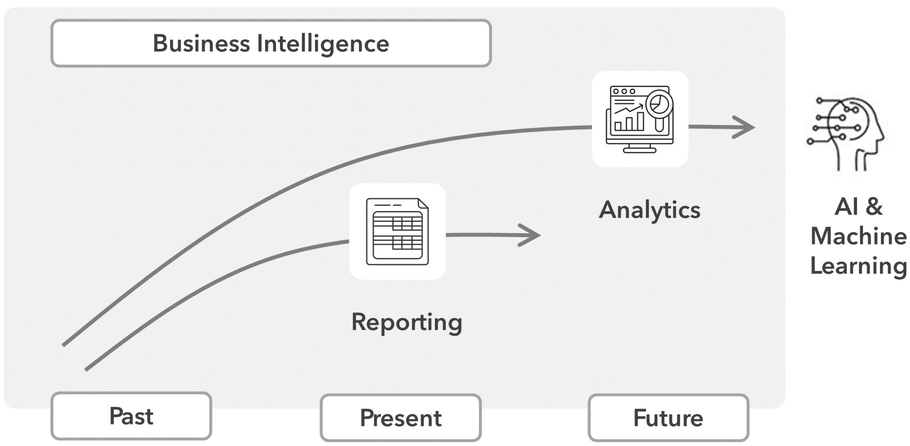
How do organizations tend to handle these subsequent queries? If the query is being asked often enough, then most will simply generate additional reports. However, there's a cost involved with this of course, as well as the time that is required to get these reports built. If the query isn't being asked on a regular basis, then most people will tend to dump the raw data out to spreadsheets and do their own manipulation until they get the answers they're after. This is a time-consuming exercise. It can be made simpler with the use of Excel pivot tables, but mastering pivot tables tends to be something not within the skillset of the casual spreadsheet user.

If there is one word that describes the limitations of reporting in this format it is "static." It does not provide a mechanism that allows the consumers of the information to immediately answer any subsequent questions that arise. And while there is a lag between wanting information and receiving it, effective decision making is impaired.

To address the limitations inherent in a static reporting format; a different type of reporting application has developed over the last couple of decades – known as analytics. Business Intelligence generally refers to several technologies, applications and practices aimed at collecting, integrating, and analyzing business information. The aim of analytics is to produce "actionable information."

The principal distinction between reporting and analytics is that the later presents information in a dynamic format – meaning that the consumer of the information can ask additional queries of their data as soon as those follow-on queries arise.

If reporting answers the "what" question of the past and present, then analytic answers the "why" and "how" moving into the future. Reporting and analytics both collect and analyze data, create richly visualized reports and customized dashboards; but their main difference lies in their orientation. A reporting application is about collecting past and present data to allow business managers to make an accurate assessment of where their business is at now. They can then use this information to make informed decisions on how they might improve current processes. An analytics application is about collecting past and present data and then making predictions about the future, given current trends.



Whereas a reporting solution will allow you to quickly work out who the most engaged clients from a particular country were last year, an analytics solution will, based on historical trends, can make predictions on who they will likely be next year. The idea behind analytics is to identify an organization's weak points; or more pointedly, to solve problems before they've occurred.

CHARTING CHANGE MANAGEMENT

Change is the impetus behind improvement, innovation, evolution, and viability. Clients and conditions are rapidly evolving as the COVID-19 pandemic has shown. If organizations are not following suit, they are falling behind and deteriorating. However, even with this reality, change is often endorsed by the few imposing the change and contested by the majority receiving the change. For the recipients, change brings uncertainty, skepticism, and anxiety.

That's why change management strategies are needed to offset the natural resistance to change and sustain the benefits of new strategies, enabling technologies and digital transformation initiatives.

Change management is an approach to systemically shift individuals, teams, and organizations from a current state to a desired future state while mitigating productivity loss during the transition, creating the environment for sustained change, and realizing the benefits of change more quickly.

The implementation of a new system will move many people away from the status quo and outside their comfort zone. Most enterprise software implementations incur many cautious or resistant users and a smaller number of users who are adamantly opposed to change. This later group may be initially difficult to recognize as they generally cast doubt in private forums outside of management visibility. If uncontrolled, the hidden agendas and failure to embrace the needed change will significantly challenge the project, and likely result in time and budget overruns.

To proactively head off this predictable occurrence, we recommend following a change management program to operate in parallel to the application deployment. Such programs can analyze changes caused by the new solution, forecast the operational impacts, understand the cascading effects to users, prepare staff for change, and implement methods to minimize employee resistance to change while simultaneously maximizing the effectiveness of the change effort.

Change Management Framework

Here are the ten most important steps in implementing a change management program with your CRM implementation.

1. **Begin with expertise**. Change management experts examine the corporate culture, solicit, and gather user feedback, design the strategy and plan, develop the case for change, provide methods and tools, and manage transformation activities and progress. Change management experts also orchestrate the change governance hierarchy. Change management consultants can bring leadership and best practices, but the change effort must be led from inside the organization.

2. **Articulate a clear vision**. Introducing more change without clear direction contributes to employee anxiety. Introducing change with clear vision, purpose, communication, and roadmap mitigates anxiety. Management needs to craft a clear project vision and articulate how this vision directly aligns with the organization's most important priorities. The vision should be tailored for each stakeholder group, including clients, frontline employees, and the organization. It's also helpful to forecast milestones along the journey so staff can witness progress and see a finish line. The more iterative successes the better.

3. **Assess organizational readiness**. A readiness assessment is a measurement of the preparedness of your organization(s) to undergo a major business transformation change or take on a significant new project. You do not want to jump into a big change or systems project without knowing if it has the resources to accomplish it effectively.

   Most change management projects kick-off with a survey to establish a baseline measurement for the critical success factors to change acceptance. Surveys can also identify cautious or resistant users or groups for additional planning, mitigation, and response.

   The reasons for change will be questioned many times during the project so the case for change must clearly identify the pressures for change, the benefits of change and the definitive reasons why not changing is not an option. Surveys can determine whether the case for change is understood throughout the organization.

   Surveys are a good start, but you need to go much further and view change from the employees' point of view. One of the best ways to craft the change management plan is to first walk a mile in the user's shoes. Empathy can provide meaningful insight. Take some time to understand how things evolved to their current situation and remember that people do not accept or resist technology, they accept or resist the way technology changes their lives. A simple example:

   Conducting an organizational readiness assessment provides the knowledge and assurance that your organization's proposed endeavor will be successful if you decide to proceed. It can also save your reputation by allowing you to avoid a potentially high-profile failure for engaging in a project you were not ready to complete.

Process standardization and workflow maturity will naturally be addressed and refined by the implementation of a CRM system. In fact, it is often a forcing function to observe, document, review, and redefine manual processes in preparation of building automations codified within a system.

4. **Design a communication plan**. Staff will react with suspicion and angst if they learn they must change work methods without understanding *why* change is needed, without having a chance to voice their reactions and concerns, and without being invited to be involved in the process. Acceptance begins with understanding the need for change and becoming involved in the change effort. Employee engagement empowers the change transformation team to learn and address user community concerns and misconceptions. They can then respond with successive communications to help staff take small steps along a steppingstone journey that build on each other until they reach the targeted level of understanding and adoption. The communication plan defines what will be communicated, to whom, when, with what frequency, for what purpose, and how and by whom it will be delivered. Experience shows the best results using a cadence of general communications delivered to all constituents supplemented with tailored communications designed for various stakeholder groups.

   Additional change management best practices include the following:

   - It's critical that management articulate a consistent narrative regarding the need for change, the process for change and the benefits of change. It's helpful if management can also provide the context for change by linking the change effort to external factors such as clients, programs, and funding.
   - The communication plan must strive to deliver the right message to the right audience at right time. As software projects can be fluid, communications should be similarly flexible.
   - Good communications plans start small, build momentum and finish with a crescendo effect. A progressive messaging plan moves recipients along a continuum from Awareness, to Interest, to Understanding, to Engagement.
   - People respond to different channels differently. It's helpful to engage stakeholders using multiple channels and media (email, newsletters, intranet notices, internal social networks, townhalls, face to face meetings, and online Teams or Zoom meetings).
   - Whether conversations or written communiqués, it's critical not to over-promise when setting expectations. It's helpful to acknowledge there will be some rough spots, benefits may be realized in small increments and not every user will benefit from the project after go-live or possibly ever.

- Make the messaging interactive. Always solicit and act on feedback. Use a channel such as an internal social network group or voice of the employee tool to capture feedback. Periodically issue surveys to identify gaps and measure trends. Make sure your communication with users is a dialogue and not a monologue and remember that all feedback is a gift. You will increase input by creating a reward system for feedback and new ideas.

5. **Perform a business impact analysis**. Sometimes called change impacts, these are the effects created when implementing new strategies, org structures, job responsibilities, processes, and systems. It's the difference between the current and the future for each individual or role. Change impacts are not just from changes in process or new technology. In fact, some of the most challenging change impacts will be caused by a change in culture and control. For example, a common change in moving to a centralized CRM system is the sharing of client information across the organization. Other changes that may impact people include new skills, types of work to be performed, performance measures, reward systems or reporting relationships.

   The goal of this step is to identify the business impacts from change and proactively implement actions to smooth these impacts. This is a four-step process of documenting key changes, identifying who is impacted, prioritizing the impacts, and implementing a change impact action plan. Change impact plans apply a combination of communication, training, updated job descriptions, new policies, revised procedures, new or revised performance measures and incentives to minimize disruptions and achieve the desired effects from the proposed changes.

6. **Delegate responsibility**. Enlist leaders in owning the change with goals, actions, and outcomes. Coaching, measurement, and recurring communication will be required. You want to ally with line of business champions and influential staff who see the vision, are respected by peers, and will endorse the needed changes. Project success improves if you partner with people whose personal success is linked to the project's success.

7. **Assemble a transformation team**. Identify, on-board and train a select group of subject matter experts (SMEs) or super users to provide peer endorsement and identify pockets of user resistance that need attention, coaching and support. These people should participate in change management workshops so they can understand how to effectively act as the local eyes and ears and promptly identify culture challenges or user resistance that need to be addressed.

8. **Make users Beneficiaries**. When the advantages of change exceed the disadvantages, staff become beneficiaries and will more willingly to accept the change. The case for change and the business impact analysis can be used to identify benefits for each role, or even individual staff. The communication plan can be used to communicate those benefits. The classic form of identifying and expressing benefits is using the WIIFM (What's In It For Me) method for each role and stakeholder group.

Making CRM accessible in preferred channels is a benefit for most users. A CRM system that lives where users work, or is available in their preferred channels and devices, will facilitate the change of new technology. This is why integrating CRM software with mobile devices; enterprise social networks and email (Outlook/Gmail) increases user adoption.

9. **Double down on training**. A change management program will focus on understanding and preparing each end user for change by developing their skills and confidence to succeed in the new environment. A CRM software deployment will cause anxiety to some employees that are accustomed to performing their work in a familiar way – even if they don't like the current system.

   - Successive training sessions will steadily erode these emotional and psychological barriers. A comprehensive training program should include a training strategy, training plan, role-based curriculum of courses and training assets such as:
   - Aids such as reference guides, cheat sheets, custom help, screen prompts, videos, podcasts, and infographics
   - Events such as periodic conference call updates, town hall meetings, lunch and learns, webinars and recordings
   - Self-service training courses and knowledge base support
   - Guided navigation or instruction technology aids such as Walk Me, ClickLearn, Pendo, etc

   CRM implementations tend to use a small number of comprehensive and generic training courses. However, a higher number of short or even bite-sized training programs or videos make training more focused, faster to consume and easier to remember. Experience shows that training is normally under-invested by about half and typically pursues the wrong objectives. The training programs that we have found most successful are probably about twice the norm, designed for the employee experience, change the objective from delivering training to measuring learning and don't end after the go-live event.

10. **Measure value**. Value realization is the ultimate litmus test for your change program. Because change is a process and not an event it's essential to monitor and measure the impact of change over time. It's similarly essential to hold individuals accountable for change impacts. One tool routinely used in CRM implementations is a user adoption dashboard that measures employee engagement and identifies sluggish user adoption. This should be used upon the go-live cut-over to establish a baseline and then at periodic intervals to view trends. Tracking user logins and system logs is a common starting place, but it's not enough. More meaningful key performance indicators may include the following:

    - System activities such as the volume of new or updated records (clients, interaction activity, referrals, cases, etc.), the types and volumes of activities created (i.e., tasks, events, emails, phone calls) and the completion of end-to-end processes (needs assessment or service entry to closure)

- Data quality and completeness metrics such as the percentage of service delivery fields that are correctly completed when new records are created
- Time based metrics such as daily time spent in the system; application use and user actions by time of day and day of week; or the number of users that haven't logged on for X number of days
- Errors incurred such as the number of manual and system errors experienced or calls to the IT helpdesk
- Under-utilized application functionality such as entities, forms and other CRM software components not being used or being lightly used

Using dashboards to measure change adoption KPIs can identify what future learning interventions are needed to improve employee engagement. Continued use of dashboards can help create a culture of continuous improvement that sustains well beyond the initial go-live event.

11. **Be ready with post conversion intermediation measures**. Experienced change management consultants often have intermediation actions or prepared responses at the ready to quickly counter resistance to change. For example, when poor user adoption is identified, remediation actions may include additional education, messaging, or training. If new systems are not being populated as expected, management must investigate to see if staff are reverting to old systems or creating shadow systems. Other measures may include revisiting incentives, or messaging that reaffirms the advantages of adopting the change as well as disadvantages of not adopting the change.

For users who are on the fence or who are clearly not on board, additional personalized education programs and a deeper dive to find those users' WIIFMs (What's In It For Me). It is critical to quickly identify non-compliance or slow adoption to act before individual resistance expands to others or small concerns elevate to become crisis. While change agents should deal assertively with resistance to change, they should not personalize the resistance. Change agents make the process, not the people, the problem.

GETTING STARTED

Phase 1 – Planning and Organizing for Success

Your team will want to invest some time in determining your requirements, as well as in choosing and implementing a system. Budget enough time to make good, thoughtful decisions informed by complete information. Rushing through this process will often make the project much more costly and time-consuming in the long run.

Speaking of budgets, if a business case needs to be formed to obtain necessary funding, a good place to start is a Cost Benefit Analysis. While solution costs are outside the scope of this report, your shortlisted vendors may provide preliminary pricing as a rough guide for this exercise.

Let's review preliminary steps to ensure your project gets off on the right foot.

Take your time. Your team will want to invest some time in determining your requirements, as well as in choosing and implementing a system. Budget enough time to make good, thoughtful decisions, informed by complete information. Rushing through this process will often make the project much more costly and time-consuming in the long run.

Gain organizational commitment. Before beginning any project, identify the problem on which the project is ultimately going to solve. For most agencies, the first, most basic priority will be to ensure reporting compliance with iCARE. Implementation of a CRM system needs an extensive collection of experts and talent. This is important as CRM involves several areas of the agency, thus its crucial to get support from all the departments: service delivery teams, IT, finance, executive support, etc. It is through the involvement of the various departments you gain credible insights before a system is implemented promoting acceptance, cooperation, and utilization of the new system.

Team formation. With planning underway, the next step will be the selection of the project team. This step is crucial as the team will be the nucleus – making recommendations and decisions and ensuring communication of the benefits and details to the entire organization. Reminder: your organization is already an expert. A common misconception during implementation is that internal resources do not have a vital role to play in their CRM implementation. Organizations often feel that they must leave this job to the technology experts. However, technology is only one critical part of a CRM solution. A CRM combines an organization's workflow and processes with technology for managing information to support those workflows. Only the organization knows its own workflow best. Therefore, every organization implementing a CRM is already an "expert" in their processes and must work closely with its technology partner(s) to ensure alignment and obtaining the desired outcomes.

Setting project goals. With the project team formed, they will suggest goals concerning improvements to workflow processes. One of the project members should be documenting assumptions and suggested project goals in detail, which will be agreed upon and prioritized – ensuring that key requirements are addressed first.

Phase 2 – CRM Selection and Implementation Steps

A big part of a CRM solution's ongoing success is choosing an appropriate solution well in the first place, but implementation – the process of getting a CRM up and running – will also greatly impact its value to your organization.

The details of this process will vary depending on the system you select, as well as on the agreement between your organization and related vendor(s). Depending on your chosen solution there may be multiple parties involved in the deployment. Some solution providers offer both the software as well as services to deliver a whole solution. Others only produce the software and rely on extended partnerships to perform or deliver services. A benefit of the later model is that if one service partner isn't meeting your needs, say providing bilingual training resources, you may seek others better suited for meeting your needs. Additionally, the larger the product or platform ecosystem the more varied the available partners, the services and specializations provided as well as interoperable or complimentary solutions that may extend your selected CRM may be offered.

Project Management and Communications

Implementing a CRM can be a time-consuming and costly process, with many elements often occurring simultaneously. Ensuring strong project management and following a detailed communications strategy can help to keep all participants informed of their responsibilities and upcoming steps in the process.

Strong project management requires that the organization identify a staff person in charge of this task. While aspects of this role may be shared or split between and external consultant and internal leader, it is critical that the project manager be a trusted team member to ensure long term alignment and continuity long after the initial deployment.

Typical tools of a project manager to help keep the project on track include:

1. Calendar. Keep track of meeting dates for all participants, as well as major project milestone dates, including the launch of the CRM system.
2. Work plan. This is typically the part of the contract that specifies what will be built or configured, what vendor support will be provided, what the overall timeline and cost should be, and the basic obligations of both the vendor and the organization.
3. Budget spreadsheet. A list of vendor costs, software fees, and other costs during implementation.

4. Task lists. A list of tasks for individual staff to complete, such as reviewing CRM functionality, making decisions on reports, testing, and so on.
5. Project management software. There are numerous specialized project management tools available, just as there are for CRM. While useful, these tools aren't absolutely necessary unless your project is large as the training and learning curve in their use must also be factored into your plan. Tools 1-4 form the base of any modern project management framework.

Both the chosen CRM solution vendor and the organization should take care to follow both the contract and work plan. The organization should ensure regular vendor communication, including the addressing of any organizational questions. A weekly or fortnightly formal communication is reasonable during the initial phases of the deployment in keeping up to date with the progress of the implementation.

Discovery – Requirements Gathering and Analysis

For a successful CRM project, there is a need for analysis of requirements or needs performed at some point. In this phase, sessions are conducted to canvass program service managers, frontline workers, and management relating the needs for the CRM system. Collectively defining the objectives and how the system will impact each department and meet essential goals. The benefit of this phase is to conceptualize the company CRM solution.

This process may be performed in advance of CRM selection – gathering a set of requirements independently provides a clean slate to assess the suitability of any prospect solution. To jump start this process, use the requirements matrix to first set the priority of each requirement; and after scoring, use this as a gauge when evaluation potential options. This process may also be performed as part of the implementation after the vendor or solution is selected. In any case, this step is critical in obtaining a working system that will be embraced by your people work for your organization for many years to come.

In many cases, the project team skip the assessment of the current practices and processes and moving directly to the CRM technology selection. Understanding the "as-is" state of your existing systems, if already close to the desired end state, is a great starting point in designing the "to-be" state. However, as many agencies across Canada independently shared, they are woefully behind best practices regarding client management systems. As such, many are open to starting their projects with an existing solution with a sentiment of conformity to a system rather than attempting to reinvent the building of practices, processes, and workflow unique to themselves. This *can* be a mistake *if* the chosen solution is technologically unable to meet key requirements. For this reason, we recommend starting with at least a high-level set of requirements gathered internally, to filter your list of options down to a manageable number. For example, if you have a need for a French user interface to support your francophone case workers as a key requirement, this immediately shortens the list.

Engaging vendors to evaluate their offerings, engaging your team members, and walking through product demos can be a lengthy and expensive process in terms of time and energy. Not to mention frustrating, if done in a protracted manner without leading to a decision, as staff become fatigued in the myriad of options and meetings.

CRM Review, Evaluation and Selection

Once you have conceptualized the ideal CRM system, the next phase will be initiating the review and selection. There are literally hundreds of CRM solutions to choose from. We have extensively surveyed, researched, and complied the CRM solutions available today focusing on the specific needs of Canadian settlement and immigration agencies serving newcomers.

The majority of small commercial application providers supply product licensing and all the related support services, such as initial systems setup, data migration, configuration, system customization, user training and on-going technical support. The opposite is typically true for large platforms and hybrid models: there may be multiple parties involved in licensing and there may be a wide array of independent service partner organizations available to assist you, in your region with specialized settlement and immigration expertise. Some vendors have fewer than 10 professionals; others are global juggernauts with more than 100,000 employees. Regardless of size, there is CRM solution and implementation partner prepared and ready to help.

Check out a variety of systems to get a good sense of what features are available and to assess how easy the systems are to use. No one can tell you definitively what solution will best fit your needs – this decision is an organizational journey, supporting a client-focused strategy and cannot be outsourced or given to any outside party. There is no “one size fits all” or “magic bullet” in CRM, as there isn’t a possibility where two different agencies are exactly alike.

Unsure of where to begin? A great (and often overlooked) resource for narrowing in on CRM systems are organizations providing similar services to yours that have already gone through the process of selecting and implementing a CRM. These organizations will often have overlapped requirements and can offer valuable advice about tools they reviewed as well as pitfalls to avoid as you proceed.

With your short-listed set of vendors determined and your requirements ranked by priority, we recommend scoring those solutions against those priorities. An example of such a comparison matrix can be found in Appendix IV which can be performed as part of the selection process.

Vendor Contracting and Software Licensing

Once you have identified a CRM system that is a good fit for your organization and selected a project manager to oversee the process, you're on to the next step: contracting and licensing. Each of these is vital in setting expectations for what kind of CRM system will be implemented, how it will be supported, and the costs involved. Don't underestimate the importance of this; CRM implementation projects that are not supported by clear contract and licensing terms often result in significant cost increases and missed timelines.

> **Contracting**: The contract phase of setting up a CRM involves an agreement (and possibly negotiations) with a CRM vendor or outside consultant regarding setup, services, and support of your CRM system. Whether you are signing a contract provided by the system vendor or negotiating your own, bear in mind that a good contract is not just a legal agreement but part of a detailed work plan that will impact how your system will be set up and run.
>
> Some vendors will require that you exclusively contract with them to implement and support the system; others may allow for support from endorsed or "certified" provides, or unaffiliated third-party consultants. For organizations with the appropriate staff and skills, some CRM systems may be implemented in-house with no outside technical support.
>
> **Licensing**: Often incorporated into the vendor contract, licensing is a written agreement outlining the CRM system vendor's rules regarding intellectual property, fair use, and costs. A license will describe what the organization can and cannot do with a CRM system. Some CRM vendors retain all ownership rights to the software, protecting their code from being modified by outside parties. At the opposite end of the spectrum, some systems are "open source" or allow bespoke development or "custom solution" development – allowing customers to modify program code extensively with minimal restrictions – albeit at a price. Maintaining CRM software license requirements may require one-time or ongoing payments, or it may be free. Take care that you understand your CRM vendor's licensing terms, and make sure you have them in writing.

Key Elements to Contracting and Licensing

There are several factors to consider when contracting and licensing software.

- Always negotiate a contract. Never begin a CRM implementation without an agreement on a contract. All contracts are negotiable. Clearly articulate what you need; ask for changes if anything is missing.
- Know all costs. Every contract should clearly specify what the costs are for complete system installation, and what licensing and support costs are required going forward.
- Determine a timeline. Clarify how long the project will take and identify a target delivery date.

- Clarify communication. Agree on a point of contact with the vendor or consultant, as well as how updates will be communicated. Ensure these updates will address any changes in cost, features, and timeline expectations.
- Identify a process for quality control and testing. Most CRM systems will require some unexpected modifications and updates during implementation. Clarify what the process is for identifying these changes, and how much of this cost (if any) will be borne by the customer.
- Establish a data-migration plan. Moving client information into a new CRM system can be a time-consuming and technically advanced task. Identify the vendor or consultant's role in this process.
- Know customer responsibilities. All customers must be involved in the CRM implementation process. Agree on testing periods, data-migration responsibilities, milestones for customer approval and sign-off, and training opportunities.

System Customization and Configuration

Some CRM systems require only basic setup and preparation before organizations can begin using them, while others require some to substantial customization before they can be implemented. In most cases, the development work will substantially affect the final CRM product experience and may be the most significant cost component.

CRM developers require a clear understanding of an organization's business rules. The organization should clarify any informal or undocumented processes that affect the customization of the CRM, and clearly explain these to the developer. The organization should also review the work of the developer at regular intervals to ensure that the task is being completed to satisfaction.

Elements to consider during software development include:

- **Explain what, and why**. Conversations with developers require a focus not only on what features should be built, but why they are important from the organization's business perspective. Leaving out the "why" can lead developers to make incorrect assumptions about how features should work, resulting in costly overruns.
- **Get involved early**. Organizations should review features in development, even if other parts of the CRM are not yet ready. This helps avoid mistakes from growing into costly budget items or missed timelines.
- **Track accomplishments**. Ask the vendor to document the features he or she has worked on, and what has been accomplished in each case. This helps organizations understand the costs of specific features, as well as what it might cost to continue working on them. It also helps confirm that the vendor is on schedule.
- **Clarify change requests and bugs**. Be sure to identify issues that appear to be "bugs" (something broken that the vendor should fix within the budget) and "changes" (work that may

or may not cost the organization extra). Reach an agreement before proceeding to work on these.

Data Migration

Many organizations have information stored in older systems that they wish to move to the new CRM. This information is oftentimes organized differently from the new CRM system, requiring some effort to align the data structure and relocate. Focusing on migration strategies early on can help ensure a smoother transfer of information in preparation to going into production.

Vendors require a close partnership with the organization to properly understand the groups or individuals responsible for managing and migrating data. Having a good grasp of the organization's ability to understand and manipulate their own data allows the vendor to offer tips and tools for how best to prepare for migration into the specific CRM tool, as well as to determine the optimal division of labor between the organization and vendor.

Guidelines to consider during data migration include:

- **Find the data**. Information is often scattered among various organizational staff and systems. Locate the useful information required to populate the CRM and identify who maintains it, what it contains, and how accurate it is.
- **Improve the data**. Many organizations move inaccurate data into their new CRM solution, creating another problem for users. Work to identify existing inaccuracies, correcting these, when possible, prior to importing data into the new system.
- **Identify available migration tools**. Some CRM systems and vendors offer tools and services to help transform data to fit the new CRM, and even to automatically move it into the system. Understand these tools and services early on and identify what work the organization must do to make use of these tools.
- **Test before migrating**. Make sure to run a "test migration" using the new system. A test helps ensure that the information transfers correctly and allows the organization to make corrections before the final transfer takes place prior to go-live.

User Training and Support

The training process is vital in CRM implementations as it enables users to understand and familiarize themselves with the system. This generates positive enthusiasm with users and momentum for the implementation. The project team should ensure that management is also trained on the how to use the system, making necessary adjustments and in control of issues.

CRM solutions offer a wide range of tools for users to learn and master. Many users will require multiple learning experiences with exposure to documentation and training to gain the critical skills required to succeed with the new system. Some CRM systems provide excellent written documentation, videos, and even other self-paced training programs, while others offer single or ongoing in-person group and individual trainings.

During user on-boarding and training, remember:

- **Identify all training options early**. Give future system users a head-start by introducing them to an overview of how they can learn to use the new solution. Understand what is free and what is fee-based. Review training materials in advance of licensing or acquisition to determine quality and scope of coverage, and to prepare users for future training.
- **Plan for gaps**. In many cases, the available training materials will not cover every CRM feature the organization plans to use. Moreover, some unique organization workflows may require further expansion for clarity. Identify any gaps in training, including written materials, video, or live webinars. Plan for how these gaps may be filled, whether internally or via external consultant or CRM vendor.
- **Learn in context**. Be sure to practice CRM skills using real (or anonymized) data the trainee can recognize and understand and not fear making mistakes.
- **Train-the-trainers**. Document all processes and tips gathered from trainings to facilitate future training of other staff.
- **User acceptance testing**. Each function of the system should be tested thoroughly by the users prior to going into production, especially those who are dependent on their specific role or function. Testing ensures that the system is working satisfactorily and accurately.

Phase 3 – Operational Excellence

Data Cleanliness – Keeping it clean

CRM data can get dirty quickly. Duplicate record creation and loose data entry standards both contribute to the problem. A combination of on-going user training and technically enforced data entry formats can ensure that the right data is entered into the right fields. For example, it should never be possible to enter notes into a phone number field.

If your CRM system has duplicate detection and/or avoidance capabilities, make sure this functionality is enabled and configured properly. Also, use any native CRM functionality or a third-party tool to regularly scan for suspected duplicates. Institute a regular merge/purge process as part of your data retention and governance policies and practices.

Standard Practices around Data Entry

Another way data becomes problematic is when vital information is missing or inconsistently recorded – even when enforced data entry methods are implemented. By creating standard processes for record entry, you can keep your software a lot more streamlined moving forward. And the more detailed the records, the quicker your duplicate checker will detect a case of duplication. Are there clear, consistent rules and practices around entering the following information points?

- **Name**: Do you include only formal names, or are nicknames acceptable? Are names proper cased, with first letter capitalized?
- **Address**: How are physical addresses abbreviated? If a user gets a new address, do you delete the old one or keep it in a secondary field?
- **Households**: Should users link entries for people who live at the same address?
- **Job titles**: Are titles written out or abbreviated? A simple difference between "Doctor" and "Dr." could create an undetected duplicate record.
- **Notes**: How should users work with the notes field? For example, if your agency will only use this field for certain information that doesn't fit into any other field, like a customer's preferred name, make sure everyone on the team knows that.

Once you've defined what your policies and standard practices will be, be sure to document your guidelines and share that information with all users who will have access to the CRM system.

Frequent Backups!

What would you do if someone accidentally deleted a client record along with all its related records and all those contacts' historical activity? Even though your CRM vendor likely creates backups, if your database ever needs to be restored you may lose changes that were made by users since the most recent backup occurred. If your CRM solution has an export service, create regular backups of any critical data as well.

Continuous Improvement and Enhancements

Continuous evaluation and enhancements are essential in every CRM system implementation. When your processes evolve so should your CRM system. Occasionally, your CRM system should be reviewed, often referred to as a "health check", to achieve a high level of user satisfaction and perform potential improvements from both user and client feedback. Additionally, vendors often release new features, innovations and capabilities that may be useful over the evolution and over the lifespan of your system.

There are new opportunities and related CRM technologies developing rapidly – plus hardware and software dependencies, like computer operating systems that continue to evolve requiring updates and maintenance – therefore, a need of continuous enhancement to ensure the CRM system meets your desired goals.

Getting prepared for this wave of change, and getting your colleagues prepared too, is crucial and needs to be planned before the kick-off your project. Managers should communicate with their teams to make sure all necessary, relevant information is known to all stakeholders. By the way, this is where a CRM solution comes in handy – sharing information is indeed one of its strongest assets – so whenever possible, please say no to excel sheets, paper and email and employ modern technologies to provide the levers to working smart.

OBSERVATIONS AND RECOMMENDATIONS

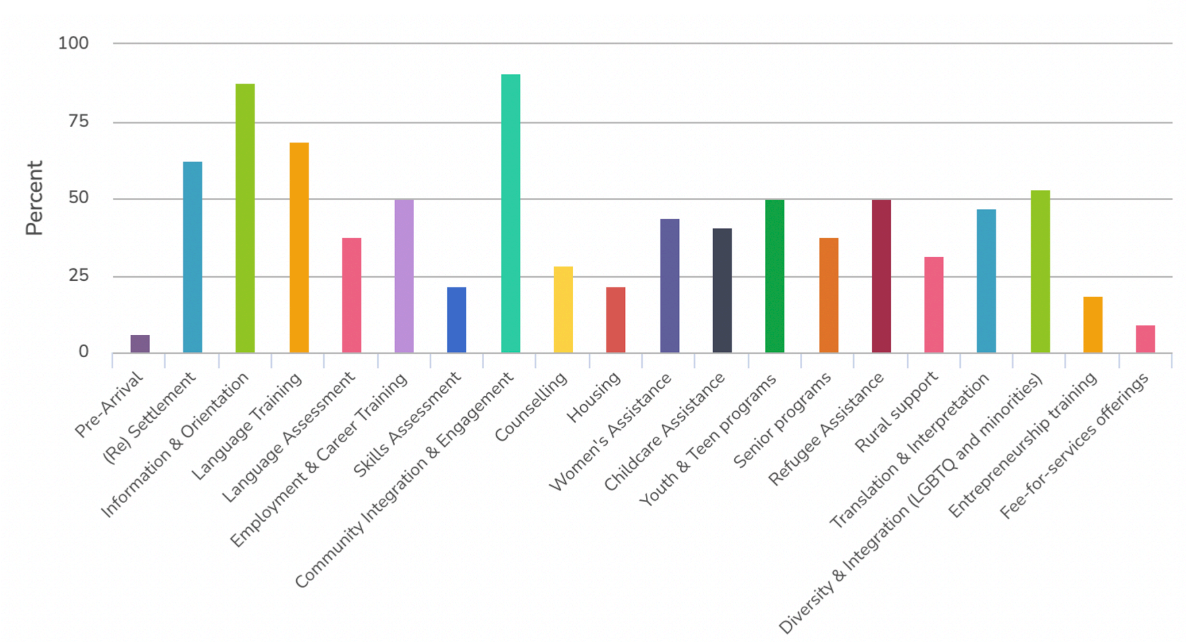
Sector Survey Insights

The survey, with 84% completion rate (very good), incorporate input from an array of respondents – 41 stakeholders from 37 agencies, including Executive Directors, program managers, service delivery personnel, and Information Technology professionals.

Moreover, representation included both small centres and large SPOs, in remote rural communities and urban areas across British Columbia; and from single-service providers (such as language training exclusively) to full-service agencies supporting +30 programs.

Unsurprisingly, the breadth and mixture of respondents resulted in a broad set of answers and insights.

For example, our first program-related question "What services does your agency provide to newcomers, immigrants and/or refugees?" demonstrates good representation of the scope of services provided by respondents.



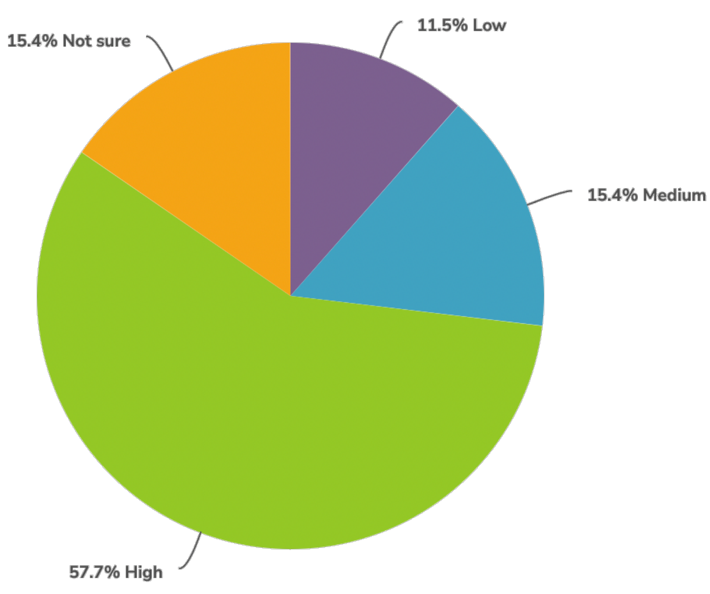
Based on the information provided, findings include:

- $117M total funding reported across 37 organizations
- 850 Fulltime employees
- 1500 Active volunteers
- 24 Fulltime IT/Technology Support staff
- < 28% currently use a CRM solution today
- 4 organizations reported using +3 solutions concurrently to service client needs
- 2 organizations reported using a custom, inhouse solution (FileMaker, MS Access)
- 410 Referral SPOs, 12.5 partners on average, with larger agencies referring > 60 SPOs

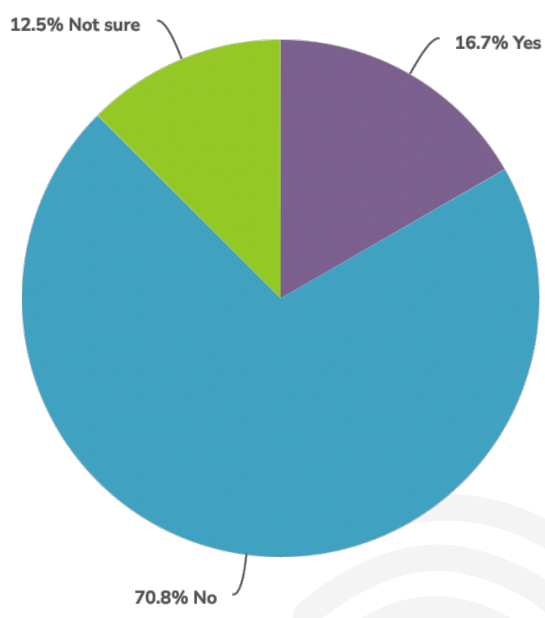
- Digital literacy rated average/proficient (scale: novice, beginner, average, proficient, expert)
- Excel spreadsheets #1 tool most used for client tracking across organizations
- OCMS most reported solution in use today (6 agencies); also reported most likely to be replaced
- 100% reported Microsoft Windows and Office 365 as primary workplace productivity tools
- 74% planning move to cloud solutions (vs on-premise)
- All organizations use iCARE, with >30% using 1 more different FUNDER management systems and 2 agencies reporting having +5 systems to work with
- Of those considering a new solution, only 17% have completed a Discovery exercise to fully understand requirements

When asked to rate the organization's readiness for a digital transformation project, nearly 60% feel ready to get started. As roughly 70% have not yet performed a discovery to fully understand their overall requirements, the solution requirements index provided may kickstart these efforts.

Performed Readiness



Performed Discovery



We also conducted 5 separate 90-minute exploratory interviews between August 9th to 20th 2021 with 10 participants from IRCC funded organizations who shared their CRM and digital transformation stories, observations, and learnings – both positives and negatives.

We thank everyone who completed the survey as well as those who graciously made time to support this research.

Recommendations Shared

The primary concerns of organizations located in smaller centres are interwoven – recognizing the need for and selecting a centralized system to streamline reporting as well as securing the funding to implement and operate the system.

iCARE Reporting and Centralizing Client Profiles

Universally communicated, the main driver in using a CRM solution is for contribution agreement reporting. A concern for those using iCARE as their only client management system, is that information flows up, but not back down for further analysis. This creates a forcing function for any size organizations aspiring to obtain more insight from operations, to better understand where time, energy and resources are being spent and how they may be tailored to meet and exceed future objectives. CRM systems work to fill this gap. As one interviewee stated, "We need to move beyond counting to understand impact and outcomes."

Moving away from the current "everything, everywhere 'spreadsheet' nightmare" as one participant not-so-affectionally referred to it, and towards a centralized client profile is a welcome change. However, one concerning finding from the survey of those considering a new solution, less than 20% have completed a requirement gathering exercise. This step should be viewed as a mandatory step to any technology investment. The CRM Solution Requirements index provides a quick, comprehensive reference that may be used to kickstart this effort.

Occasionally organizations experience "sticker shock" when looking at making significant technology investments like a CRM system. If your organization is in this position, an easy way to move forward is to perform a business case or cost-benefit-analysis. By studying the current, as-is time inefficiencies (waste), any potential savings recuperated by streamlining operations as well as the opportunity cost of not making the investment – can then be weighed against investment cost. One large agency shared their own analysis that their CRM solution returns 3 FTE salaries annually, more than returning their annual investment.

Unless building a custom solution internally, your team will be working with a provider's people for years to come. Besides being technically competent, consider assessing any to-be partner's communication savvy and "nice" factor to work with as change management processes and personal communication are important to the project's smooth transition and adoption with the new system.

Funding Technology and Innovation

Paradoxically, while funding agreements mandate routine reporting metrics to measure service utilization, there is frequently misunderstanding by funders that information can be managed and reported without requisite investment in systems to provide that information efficiently.

An IRCC funded report entitled "Sector 3.0: Innovation is in our DNA" (PeaceGeeks, August 2021, page 35, https://peacegeeks.org/settlement-30) sums up the funding issue best, stating "Technology is both essential, and a significant challenge. It is not an administrative cost, but core to program delivery; and as such, must be reflected in planning and forecasting." This sentiment was repeatedly shared by those successful in securing funding – technology and innovation is not an administrative expense; it is an operational cost.

A survey respondent shared "Database management is a very important issue for not-for-profit organizations, but I am not sure if it's a good idea for a major funder to be involved in this way… the pro is that they are needed to provide funding resources. The downside is if their interests may end up trumping the broader needs of the organization… that would be problematic." Indeed, a recent experience with a project in Atlantic Canada revealed a provincial funder employee attempting to tip the scales in favor of a particular solution – after an independent study with considerable analysis was performed to conclude an alternate solution was the best fit. If this conflicting advice were followed, it would surely lead to project failure as this recommendation ignored the internal buy-in established as part of the analysis and evaluation process – not to mention the person lacked the internal workflow knowledge or had relevant technology expertise. Outside parties independently prescribing solutions, although well-intentioned, often lack the intimate knowledge about your organizational processes and its needs, goals, and aspirations – creating a recipe for failure. It is critical to perform your own analysis to ensure the best fit for your needs and ensure the chosen technology solution works to support your people and workflow processes.

Similarly, some organizations make the mistake of accepting vendors claims without verifying key features or functionality and end up with a system that fails to meet their needs, or a hodgepodge mix of disconnected systems. One party shared "…the solution (redacted) was helpful to start, as a centralizing database – managing unique clients, but no sense of # of programs being used, and it didn't meet our needs except for IRCC funded programs – not for other programs and service delivery, equating to duplicating data across multiple systems, recognizing unique functional group's needs – we waited too long to migrate (from a product) to a platform."

When asked about funding strategies, one interviewee successful in securing funding shared "We positioned the need for our solution as a 'client service communication tool' since it allows tracking and meeting iCARE requirements and minimizes staff effort in answering questions in narrative reports. Being responsive and effective necessitates the use of a system. Otherwise, manual input into iCARE is necessary placing more time demands on collecting and organizing this data – the system provides automated bulk uploads and gives us the added ability to answer key performance indicators and monthly metrics questions around services instantly. Getting our funders to agree the first time, wasn't about development or database cost, it's about subscriptions used as a utility. It's like paying for a telephone service, not buying a telephone."

Underfunded IT systems supports, whether hardware, software applications or the accompanying user support, lead many to address their client management needs by defaulting to the lowest-common denominator technology, namely, the spreadsheet. This is true of both large and small agencies with the later using dozens of spreadsheets, paper, and email as their primary management tools. While these unstructured data tools are convenient, pervasive, and allow easy sharing of data, the flipside is these formats are rarely secure and difficult to report in aggregate or analyze, when compared to structured CRM systems.

Change Management and User Adoption

After successfully navigating the funding and system selection hurdles, a new challenge arises, namely: change management and user adoption. This concerns SPOs of all sizes. "Finding the funds initially was challenging, but some staff are reluctant to let go of paper-based records and make full use of the system (redacted) - they tend to see it as something 'else' they have to do."

Change management is challenging for any organization at the best of times. During the extended work from home situation due to COVID-19, stakeholders found that digital initiatives providing virtual client services were accelerated – some learning they lacked a foundation to build upon. This resulted in frontline workers unable to work from the office and using unsecure, unmanaged consumer services to connect with and serve clients. Even today, settlement employees across Canada report using unsanctioned tools (non-approved technology applications) by their agency such as WeChat, Facebook, Slack, and Zoom (to name a few) to provide clients service out of desperation – at least for those who maintain formal security and acceptable use policies. Compounding the issue is the general lack of internal IT supports caused by lack of funding.

One Senior Program Manager shared her practical, hard-earned lessons learned over years working on CRM projects within the settlement sector:

- Plan for ongoing training – new staff training, staff transitioning into new roles, training to correct data entry issues or to communicate system changes.
- Create data entry manuals for user groups so training and practices are consistent for staff.
- Have one designated role (i.e., Database Administrator) overseeing system functions and data entry practices. This role ensures data accuracy and takes the lead on communicating system changes and developing data entry manuals/training.

- Identify "Superusers" within each user group/team. Superusers provide data oversight and training to their group and communicate with a Database Administrator to stay up to date on data entry issues and system changes. Superusers are especially helpful at implementation of a new system when a significant learning curve is taking place and staff have different digital literacy skill levels.
- Where possible, hire a "digital support worker" to bridge technology IT support for internal training and application superusers working within each program.
- Regularly compare funder reports with internal reports to identify discrepancies. Discrepancies between funder reports and internal reports can identify additional training needs.
- Keep staff involved in the process. We presented two options to staff for demos with the software rep. Allow lots of time for training, start with using the basic functions and build from there. Spend time discussing and re-iterate how the CRM will support and enhance the organization and your ability to serve clients. Find and present reports that are of interest to staff.

See Charting Change Management for a complete framework of best practices for consideration on your project and deeper exploration of this topic.

Closing comments

The intent of this report is to provide standardized research on solutions in-market today, discuss and explore options and alternatives, provide best practices and frameworks for implementing a CRM solution as well as learning from peers about their insights, experiences, and recommendations.

We hope this work informs and accelerates your decision in finding the right CRM or client management solution for your organization. It is an essential, long-term investment for your operations, your internal teams job satisfaction and delivering a positive experience for the many newcomers being welcomed to, and served in, Canada.

Lastly, thank you for placing your trust in us. We enjoyed working with AMSSA members and SPO participants and grateful to those who shared their insights and experiences – we hope to have served in some small way in helping you deliver success in your mission.

Sincerely,

Sean and the TenDigits team

APPENDIX I – ACRONYMS AND ABBREVIATIONS

This section and the table below are a list of acronyms and abbreviations that are specific to this document and may not be common knowledge.

Acronym	Full Name
AMSSA	Affiliation of Multicultural Societies and Service Agencies
API	Application Programming Interface
AWS	Amazon Web Services
CRM	Customer / Client Relationship Management
CSV	Comma Separated Values
FTE	Fulltime Equivalent (employee)
GCP	Google Cloud Platform
iCARE	Immigration Contribution Agreement Reporting Environment
IRCC	Immigration, Refugees and Citizenship Canada
ISV	Independent Software Vendor
IT	Information Technology
ROI	Return on Investment
SaaS	Software-as-a-Service
SMS	Short Messaging Service
SPO	Service Provider Organization
XLS	Microsoft Excel file format

APPENDIX II – SURVEY QUESTIONS

The survey was designed with a time target of 10-15 minutes, limited to 4 open-ended questions, with 26 questions in total and was provided to correspondents in both English and French. Beyond basic organization demographics, the list of questions asked:

Service Delivery	**Service de livraison**
What Services does your agency provide to newcomers, immigrants and/or refugees? (Check all that apply)	Quels services votre organisme offre-t-il aux nouveaux arrivants, aux immigrants et/ou aux réfugiés ? (Cochez toutes les cases)
Number of SPO partners you routinely work with?	Nombre de partenaires DU SERVICE DES PIÈCES APRÈS-VENTE avec lesquels vous travaillez régulièrement?
Number of Funders (IRCC Funding, Provincial Programs, Corporate Contributors, Individual Donors)	Nombre de bailleurs de fonds (financement de la CCRI, programmes provinciaux, contributeurs corporatifs, donateurs individuels)
Number of fulltime staff members?	Nombre de membres du personnel à temps plein?
Number of active Volunteer members?	Nombre de membres bénévoles actifs?
Number of INTERNAL IT/Technical Support staff?	Nombre d'employés INTERNES de l'assistance TECHNIQUE/INFORMATIQUE ?
What is the digital literacy of your staff?	Quelle est l'alphabétisation numérique de votre personnel ?
What is your primary Desktop Operating System?	Quel est votre principal système d'exploitation de bureau ?
What is your primary Productivity Suite?	Quelle est votre suite de productivité principale ?
Besides iCARE, how many FUNDER systems do you use?	Outre iEDEC, combien de SYSTÈMES DE FINANCEMENT utilisez-vous ?
USING a solution today	**UTILISER une solution aujourd'hui**
Which client management (CRM) database solution(s) are you currently using? (Check all that apply)	Quelle solutions de base de données de gestion des clients (CRM) utilisez-vous actuellement ? (Cochez toutes les cases)
What's working well with your current solution?	Qu'est-ce qui fonctionne bien avec votre solution actuelle ?
What do you believe is missing from your current solution?	Selon vous, qu'est-ce qui manque à votre solution actuelle ?

What was the greatest barrier to a successful implementation of the current system? (Time, technology limits, financial, personnel expertise, other?)	Quel a été le plus grand obstacle à une mise en œuvre réussie du système actuel? (Temps, limites technologiques, finances, expertise du personnel, autre?)
What key learning(s) can you share with others about your digital transformation project?	Quels enseignements clés pouvez-vous partager avec d'autres au sujet de votre projet de transformation numérique ?
CONSIDERING a new solution	**ENVISAGER une nouvelle solution**
What is your organization's readiness for a digital transformation project?	Quelle est la préparation de votre entreprise à un projet de transformation numérique ?
Have you prepared a business case or cost benefit analysis for funding?	Avez-vous préparé une analyse de rentabilisation ou une analyse de rentabilité pour le financement?
Has a financial case or COST BENEFIT ANALYSIS been prepared for funding?	Une analyse de rentabilisation ou une ANALYSE COÛTS-AVANTAGES analyse coûts-avantages a-t-elle été préparée pour le financement ?
Have you performed a DISCOVERY to understand your solution requirements?	Un exercice de DÉCOUVERTE a-t-il été effectué pour comprendre les exigences de la solution envisagée ?
Has a DISCOVERY exercise been performed to understand solution requirements?	Un exercice de DÉCOUVERTE découverte a-t-il été effectué pour comprendre les exigences de la solution ?
What is your preferred deployment model?	Quel est votre modèle de déploiement préféré ?
How is your staff supported by IT?	Comment votre personnel est-il soutenu par LE SERVICE INFORMATIQUE ?

APPENDIX III – CRM SOLUTION REQUIREMENTS

Use the following list of requirements in your selection process by first prioritizing each item (low, medium, high) and then score each of your short-listed solutions against your highest priorities. This list may be expanded or reduced based on the level of detail you wish to evaluate your solutions under consideration.

1	KEY REQUIREMENTS		Description
1.1.1	Client Management	Record Management	The solution provides contact (client) management features that allow users to easily create contacts and view contact information in a consolidated way. It also allows users to track all interactions, schedule appointments, manage to-do items, provide support, and collaborate with the contacts.
1.1.2	Client Management	Case Management	The solution allows multiple individuals or departments to collaborate on an issue or case for a particular client or a group of clients. It helps keep track of client requests and issues by creating support cases and allows users to escalate, reassign, or put a case back into the service queue.
1.1.3	Client Management	Activity Management	The solution maintains client activity history for reporting and tracking purposes. It helps users manage tasks more efficiently while ensuring that tasks are completed according to schedule. When a task is created in the CRM, it should be automatically linked to the corresponding account, contact, or opportunity.
1.1.4	Client Management	Shared Records	The solution provides users the functionality to store client data in a location where multiple users can access from multiple systems through shared folder facility without the need of a server.
1.1.5	Client Management	Appointment Management	The solution enables users to link all appointments to the specific contact, a project folder, or a team member, that can be set as recurrent, all day or on a specific time.
1.1.6	Client Management	Referrals	Ability to refer clients to/from external service provider organizations and internal teams, service programs or members.
1.1.7	Client Management	Referrals	The solution allows users to revoke or reverse a given referral assignment.

1.1.8	Client Management	Household Associations	Ability to define relationships between clients within a family structure.
1.1.9	Client Management	Internal Collaboration	The solution provides features that enable internal support teams such as client service and support staff to share information on a common platform and eliminate overlapping activities of different functions. The solution should provide users a platform to work together and build strong and long-lasting client relationships.
1.1.10	Client Management	Search Capabilities	The system should contain a method/tool to provide a robust, easy, and centralized way for users to support searches by FOSS#, SSN, Name/DOB, Client UID, etc.
1.1.11	Client Management	Document and File Management	The solution allows users to quickly locate and access client-related documents such as intake forms, government ID records, signed waivers, resumes, etc. as well as emails from its interface.
1.1.12	Client Management	Data Import and Export	The solution allows users to import data from other programs including email, scanned documents and MS Excel data into the CRM system. And provides the functionality to export customer data into an excel file for backup and sharing.
1.1.13	Client Management	Rerouting Client Requests	When the front desk gets a phone call, they can send a request to the newcomer advisor for their input or generate an appointment based on calendar availability and the severity of the concern.
1.1.14	Client Management	Re-Routing Client Messages (social media)	Communications team can reroute requests to Settlement Advisory team on inquires and set up appointments based on calendar availability
1.2.1	Client Interaction Management	Account Management	The solution provides an account management feature that gives businesses the capability to manage the relationships they have with other companies. The solution provides users an ability to perform common tasks such as: view the Activities, Appointments, Assets, Contacts, Contracts, Documents, Emails, Events, Expenses, Mailings, Notes, Support items, Interactions or Tasks that are associated with the account or with any of the contacts at the account.
1.2.2	Client Interaction Management	Filtered Views	The solution provides users an integrated and built-in custom filter view functionality, allowing them to apply one or more custom filters to a contact or an account.

1.2.3	Client Interaction Management	1:1 and Group Interaction Management	The solution provides tools for tracking client interaction and maintaining communication logs between users and the clients to eliminate any overlap of interaction by multiple interactions with a single client and/or household.
1.2.4	Client Interaction Management	Group Interaction Management	The solution should support group follow-ups of invitations to events, planned cohorts, group-based workshops, family appointments,
1.2.5	Client Interaction Management	Payment Management	The solution helps users and support teams keep track of pending payments to be made or collected from its clients or customers.
1.2.6	Client Interaction Management	Client Segmentation	The solution allows users to collect client data and store it in one place and further segment this data as per different categories. It allows users to send customized messages to the client in order to boost and enhance engagement.
1.2.7	Client Interaction Management	Learning Support	The solution provides support for custom training plans, classes, client registration and enrolment, etc.
1.2.8	Client Interaction Management	Attendance	The solution enables users in language, counseling, and work training programs to track client attendance.
1.2.9	Client Interaction Management	Real-time Notifications	Client-based alerts to critical information triggered by processes, workflow, or status.
1.2.10	Client Interaction Management	Evaluation	An optional feedback survey/evaluation is sent to the newcomer after every use of service.
1.3.1	Marketing and Campaign Management	Campaign Design	The solution allows users to plan, execute, and measure campaigns from start to finish. The solution creates and manages campaigns in a single window across emails, social media, events, and direct mail.
1.3.2	Marketing and Campaign Management	Batch / Mass Email Marketing	The solution has the capability to design emails and newsletters with easy-to-use design tools, sends emails to groups of client and newcomers, and tracks/reports on deliveries. It also lets users gather a complete view of email performance.
1.3.3	Marketing and Campaign Management	Auto Responders	The solution allows users to send auto-replies such as thank you emails for welcoming clients on-board, email-acknowledgments and follow up emails to the clients.
1.3.4	Marketing and Campaign Management	Email Tracking	The solution provides real-time visibility to the users to track the emails being sent to the clients and to see the log of opened, read and unopened emails.

1.3.5	Marketing and Campaign Management	Triggered Email	The solution provides a triggered email feature, which allows users to listen to specific client behavior and events and respond with an appropriate real-time email.
1.3.6	Marketing and Campaign Management	Campaign Analysis	The solution provides a campaign analysis feature that allows users to determine ROI (Return on Investment). ROI involves looking at the cost of a marketing campaign relative to the profit generated. This is a favored calculation by CRM marketers for determining whether a specific marketing campaign or program should be deemed a success.
1.3.7	Marketing and Campaign Management	Campaign Delivery	The solution provides campaign delivery features to ensure that the messages go out as scheduled to the desired target audience. Campaign delivery is a critical step in determining whether the marketing budget would deliver the desired results.
1.4.1	Workflow Automation	Task Scheduling and Tracking	The solution allows users to create and schedule tasks online for recurring tasks and helps users track their active status.
1.42	Workflow Automation	Workflow Management	The solution automatically creates and assigns tasks to the employees based on predetermined prompts set in the CRM software.
1.4.3	Workflow Automation	Custom Workflows, Process Automation	The solution allows setting custom workflows for automating processes that do not require any user interaction. It automatically triggers those actions when predefined, specified conditions are met.
1.4.4	Workflow Automation	Employee Records	The solution manages the employee database and maintains records of all the current and past employees.
1.4.5	Workflow Automation	Organizational Hierarchy	The solution stores data in a manner that corresponds to the designation of the people in the organization.
1.4.6	Workflow Automation	Group Calendar	The solution provides a community calendar that lists all employee tasks and deadlines.
1.4.7	Workflow Automation	Performance Tracking	The solution provides tools to track the performance of each employee as he/she interacts and works with the contacts.
1.4.8	Workflow Automation	Process Editor	The solution provides a visual drag-and-drop editor to design multiple processes, set progression sequences, edit stages and properties, and specify conditions and actions to be met.
1.4.9	Workflow Automation	Progress and Targeted Achievements	Customizable client journey progress towards meeting key milestones by service.

1.4.10	Workflow Automation	Waitlist Reminders	The solutions provide automated outreach and follow-up to with clients on waitlists to confirm they still need a given service for longer than certain number of days.
1.4.11	Workflow Automation	Workflow / Process Monitoring	Ability to observe status of manual/automated system workflows.
1.5.1	Web Portals	User Sign-On and Access	The solution supports single sign-on based on corporate systems.
1.5.2	Web Portals	External User Registration and Profile	The solution provides robust tools for bilateral communication between users and clients. The users must be able to register themselves with the CRM system so they may be kept informed of the status of their requests via email, through the web portal, and/or by message to their mobile device.
1.5.3	Web Portals	Central User Management (LDAP/AD)	The system can integrate with LDAP and/or Active Directory to tie into corporate user management.
1.5.4	Web Portals	Portal Permissions	The solution offers password protection and allows setting different access permissions (read, write, edit, comment) for portal users.
1.5.5	Web Portals	Custom Portals	The solution allows for creating branded portals using the CRM database for clients, teachers, volunteers to explore the services an agency offers. It enables creating views to display records with images, tags, color codes, and more.
1.5.6	Web Portals	Multi-Language (Localization)	The solution supports multiple languages and provides localization capability to change the preferred language of the portal interface.
1.5.7	Web Portals	Integrated (Single Virtual Application) Portal	The solution can be launched via a single application.
1.6.1	Service Provisioning	Settlement, Resettlement and Community Services	The solution includes functionality specific to delivering Settlement services.
1.6.2	Service Provisioning	Employment Services	The solution includes functionality specific to delivering Employment services.

1.6.3	Service Provisioning	Language and Learning Services	The solution includes functionality specific to delivering Learning and Language education services.
1.6.4	Service Provisioning	Community and Family Counselling Services	The solution includes functionality specific to delivering Counselling services.
1.6.5	Service Provisioning	Intake, Assessment and Eligibility Forms	The solution supports a capability to allow inputs in a base language (English) with accommodation for translated content (French) for cross department use of form information possible and easy. Allows for specialized intake for services program specific services and plans. e.g., language and leadership programs.
1.6.6	Service Provisioning	Intake, Assessment and Eligibility Forms	The solution allows capture of common needs assessment by any department.
1.6.7	Service Provisioning	Intake, Assessment and Eligibility Forms	The solution supports the capture of optional or mandatory exit plans by service/program.
1.6.8	Service Provisioning	Intake, Assessment and Eligibility Forms	The solution enables or allows for specialized intake for services program specific services and plans. e.g., language and leadership programs.
1.6.9	Service Provisioning	Intake, Assessment and Eligibility Forms	The solution allows tracking clients by country of origin.
1.6.10	Service Provisioning	Intake, Assessment and Eligibility Forms	The solution tracks details of clients that were deemed ineligible for services.
1.6.11	Service Provisioning	Programs	The solution supports independent enrolment criteria for each service (rules).
1.6.12	Service Provisioning	Programs	The solution supports programs budgets by maximum dollars and maximum service units.
1.6.13	Service Provisioning	Programs	The solution supports tracking program exits.
1.6.14	Service Provisioning	Programs	The solution allows action plan checklists to be attached to a service setup process.

1.6.15	Service Provisioning	Programs	The solution can provide reporting deadlines for a service with early reminders for service / program owners.
1.6.16	Service Provisioning	Programs	The solution supports tracking program exits.
1.6.17	Service Provisioning	Programs	The solution can track the outcomes after program close - e.g., 3 to 6 months after program - tracking success in finding a job, etc.
1.6.18	Service Provisioning	Programs	The solution can distinguish between clients returning to a service and those that are new to the service (initial intake).
1.6.19	Service Provisioning	Programs	Ability to track number of hours by client by funder.
1.6.20	Service Provisioning	Programs	Ability to track number of hours by client by program.
1.6.21	Service Provisioning	Programs	Ability to track number of sessions by service provider by program.
1.6.22	Service Provisioning	Programs	The solution can support tagging of program/service locations for funder purposed reporting.
1.6.23	Service Provisioning	Programs	The solution can track in-kind donations. For example, the number of hours of speaking engagement and shared back as a tax write off.
1.6.24	Service Provisioning	Programs	Ability to track Service Utilization Standards by Program.
1.6.25	Service Provisioning	Progress Reports	The solution supports tracking of execution to program plans.
1.6.26	Service Provisioning	Progress Reports	The solution includes progress reports by client, by funder, by program, service, and service provider.
1.6.27	Service Provisioning	Progress Reports	The solution can provide a service summary report by Fiscal Year End.
1.6.28	Service Provisioning	Progress Reports	The solution can provide a service summary report by calendar year.

1.6.29	Service Provisioning	Volunteer Management	The solution provides volunteer management features that allow users to easily create volunteers and view contact information in a consolidated way. It also allows users to track all interactions, schedule appointments and availability, manage to-do items, provide support, and collaborate with the clients.
1.6.30	Service Provisioning	Volunteer Management	The solution provides support timesheets for service providers (e.g., volunteers).
1.6.31	Service Provisioning	Miscellaneous	Ability to track of assets loaned or granted, e.g., laptop, books, training materials, etc.
1.6.32	Service Provisioning	Miscellaneous	Ability to track expenses of any service program, e.g., everything from bus tickets to laptops.
2	**FUNCTIONAL REQUIREMENTS**		
2.1.1	Platform Features	Interactive	The solution's dashboard enables exploration of data by changing charts using color, brightness, size, shape, and motion.
2.1.2	Platform Features	User Friendly	The solution is simple and intuitive providing users a good user experience.
2.2.1	Platform Capabilities	Modern Data Architecture	The system should contain tools to provide a robust and centralized way for administrators to search, capture, store, re-use, and publish metadata objects so as to enable users to leverage the same systems-of-record semantic model and metadata.
2.2.2	Platform Capabilities	Common / Master Data Model	The solution helps users to manage master data by providing them a 360-degree view of the customer and eliminating any duplicates from the operational master data related to the client, thereby providing the most accurate version of the data to the user.
2.2.3	Platform Capabilities	Custom Branding	The solution enables incorporating agency/customer logo, default colors, and organization information into landing pages, emails, live support chat windows, and more to represent a specific brand.
2.2.4	Platform Capabilities	Custom Modules	The solution allows adding and exporting custom modules to collect custom data sets and organize subsets of information. Packages can be generated to accommodate multiple modules of different types.

2.2.5	Platform Capabilities	Comprehensive Records	The solution provides tools to differentiate between a client and external Service Provider Organizations (SPO) and provides services based on requirement. It possesses the capabilities to manage multiple contacts per SPO and special client relationships.
2.2.6	Platform Capabilities	Data Integrity	The solution should allow input fields to be defined as required/mandatory, recommended or optional depending on form and entity.
2.2.7	Platform Capabilities	Input Validation Rules	The solution permits to set validation rules with condition checks across multiple criteria to prevent inaccurate data from entering the CRM. It can include an error message to display when the user inputs an invalid value.
2.2.8	Platform Capabilities	Data Quality and Cleansing	The solution supports data quality and duplicate detection by design with deployment processes and technologies to enable profiling, analysis, remedial actions, and automated cleansing.
2.2.9	Platform Capabilities	Multi-Language (Localization)	The solution supports multiple languages and provides language packs to change the language of the user interface in the CRM application.
2.2.10	Platform Capabilities	Data Enrichment	External data inclusion and client data enrichment. LinkedIn, ZoomInfo, Dun&Bradstreet, etc.
2.2.11	Platform Capabilities	External Database Connections	The solution provides connections or links between solution and external databases for data warehouses, data lakes, etc. It maintains master records and takes care of synchronization requirements and data cleansing.
2.3.1	Business Intelligence and Reporting	Activity Dashboard	The solution provides dashboards that show real-time information about leads, opportunities, and accounts. The dashboard access is limited to specific user profiles so the team members can only see what they can see.
2.3.2	Business Intelligence and Reporting	Custom Dashboards	Based on user role, team/department, or group.
2.3.3	Business Intelligence and Reporting	Pre-built Funding Agency Reports	The solution provides IRCC iCare bulk upload and export to Excel, as well as other funding providers, etc.
2.3.4	Business Intelligence and Reporting	Program Performance	The solution can provide data to support cumulative fiscal or calendar year consumption.

2.3.5	Business Intelligence and Reporting	Custom Reports	The solution enables users and administrators to build custom reports to visualize data based on various criteria, including but not limited to custom budget, regulatory, and funding reporting requirements.
2.3.6	Business Intelligence and Reporting	Ad-hoc Reporting	The solution enables users to run on-demand, ad-hoc reports to visualize data based on various criteria.
2.3.7	Business Intelligence and Reporting	Client Reporting	The CRM solution helps users track clients' status and visualize a journey, right from the time of initial intake created help users make informed decisions.
2.3.8	Business Intelligence and Reporting	Business Intelligence	The solution provides business intelligence (BI) features that can accurately monitor and measure service delivery factors and customer satisfaction, leading to appropriate corrections, better client engagement, good client experiences, and newcomer onboarding.
2.3.9	Business Intelligence and Reporting	Trend Indicators	The solution has the capability to point out patterns within the data.
2.3.10	Business Intelligence and Reporting	Charting and Visualization	The solution provides guidance to the users by suggesting/designing the best possible representation of the data.
2.3.11	Business Intelligence and Reporting	Reporting Formats	The solution supports user reports and output to be saved in common formats, such as HTML, Excel, CSV, Crystal Reports, or PDF to provide flexibility.
2.4.1	Knowledge Management	Document Creation	The solution provides users the ability to generate documents outlining how their products operate as well as policies and procedures detailing how to support them.
2.4.2	Knowledge Management	Knowledge Creation Workflow	The solution manages the creation of knowledge-based content, with features such as custom document statuses, permission-based reviews, support for review queues, review alerts, adding review steps, etc.
2.4.3	Knowledge Management	Search Capabilities	The solution provides advanced search capabilities and provides the support for various features such as Frequently Asked Questions (FAQs), Tree-based search, Full-text search, searching on document attributes, Natural language queries, Case-based reasoning, Refining existing searches, etc.
2.5.1	Email Communication	Direct Interaction	Email communications from CRM interface.

2.5.2	Email Communication	Message Logging	Saved or logged mail interactions from alternate email clients (non-CRM originated) such as Gmail, Outlook, etc
2.5.3	Email Communication	Supported Email Clients	3rd-Party email clients supported, such as: Apple Mail, Gmail (web, mobile), Outlook (web, desktop, mobile apps)
2.5.4	Email Communication	Canned / Template Responses	The solution provides pre-determined email responses to commonly asked questions for support agents to reply to prospects quickly.
2.5.5	Email Communication	Engagement Tracking	Ability to send tracked messages to measure open and click engagement
2.5.6	Email Communication	Automated / Scheduled Messages	The solution allows scheduling emails to go out at a specified date and time and facilitates choosing from several pre-selected times or even a custom time period. It enables editing the scheduled emails before delivery.
2.5.7	Email Communication	Mass Marketing Emails	The solution allows sending individual and personalized emails to clients and recipients from dynamics and pre-defined lists.
2.5.8	Email Communication	Email Analytics	The solution provides reports to analyze the delivery rates (bounce rates, click rates) and engagement for sent emails. The reports are classified across each user based on the number of emails they have sent on a daily, weekly, or monthly basis.
2.6.1	SMS Message Communication	SMS Direct Interaction	The solution allows reaching clients through SMS and sending them personalized texts using the data stored in the CRM.
2.6.2	SMS Message Communication	Supported Apps	3rd-Party SMS/Chat apps supported such as Facebook Messenger, WhatsApp, WeChat, MS Teams, etc
2.6.3	SMS Message Communication	Broadcast SMS Messages	The solution allows sending personalized individual and mass messages to recipients.
2.6.4	SMS Message Communication	SMS Message Logging	The solution allows saving or logging SMS interactions in CRM.
2.6.5	SMS Message Communication	Messaging Analytics	The solution provides insights into the text messages' performance, including analyzing which templates received higher responses from the target client base.
2.7.1	Social Media Integration	Integration with Social Media Communities	The solution can support social media communities to track client information.

2.7.2	Social Media Integration	Support for Social Media Functions	The solution can support social media functions such as tagging, bookmarking, etc.
2.7.3	Social Media Integration	Ability to Export Knowledge-base Articles	The solution can export knowledgebase articles so the users can post and share those articles on social media platforms on an automated basis.
2.7.4	Social Media Integration	Social Profiles	The solution incorporates social profile data to enhance segmentation and scoring, including name, location, and description - as well as a history of social sharing activity.
2.7.5	Social Media Integration	Social Analytics	The solution allows users to track social sharing enabling them to get insights into who shares their content, social conversion rates, how much "social lift" they are getting from campaigns, and the impact of social media on the bottom line.
2.8.1	System Integrations	Microsoft Office / Office 365 Apps	The solution should be able to integrate with MS Office applications: email, calendar, contacts, etc.
2.8.2	System Integrations	Google Workplace Apps	The solution should be able to integrate with Google GSuite/Workplace applications: email, calendar, contacts, etc.
2.8.3	System Integrations	Enterprise Collaboration Platforms	The solution should support and integrate with Microsoft Teams, Slack, etc.
2.8.4	System Integrations	Survey Management	The solution supports and integrates with Microsoft Customer Voice, SurveyMonkey, services to provide survey design, templates, question/responses, and analytics.
2.8.5	System Integrations	Business Intelligence Tools	The solution supports and integrates with Microsoft Power BI, Tableau, Oracle BI, etc.
2.8.6	System Integrations	Cloud-based File Storage	The solution supports and integrates with Microsoft OneDrive, Google Drive, Box, Dropbox file sharing services.
2.8.7	System Integrations	Data Processing Platforms	The solution supports and integrates with Microsoft Automate, Zapier, PieSync, etc.
2.8.8	System Integrations	Marketing Automation Platforms	The solution integrates with various marketing automation platforms such as Act-On, Marketo, Pardot, HubSpot, etc. to gain insights into every interaction with clients, automate actions across multiple areas of marketing, streamline marketing workflows, and measure the outcomes of marketing campaigns.

2.8.9	System Integrations	Accounting / Financial Systems	The solution supports and integrates with accounting systems such as: Sage, QuickBooks, Xero, Microsoft Business Central, etc.
2.8.10	System Integrations	Payments	The solution supports and integrates with credit card and payment system gateways like Stripe, PayPal, etc.
2.8.11	System Integrations	Point of Sale (POS)	The solution supports and integrates with point of sales (POS) systems.
2.8.12	System Integrations	ERP Systems Integration	The solution integrates with popular ERP systems from SAP, Oracle, Microsoft, etc.
2.8.13	System Integrations	Web Conferencing	The solution supports and integrates with Microsoft Teams, Zoom, WebEx, etc.
2.8.14	System Integrations	E-Commerce	The solution supports and integrates with Microsoft Commerce, Shopify, Magento commerce services to support fee-based services.
2.8.15	System Integrations	E-Signature	The solution supports and integrates with DocuSign, HelloSign or similar electronic signature capture services.
2.8.16	System Integrations	Mapping Solutions	The solution supports tight integration with mapping solutions such as ESRI ArcIMS and Google Maps thereby allowing users to visualize the spatial component of business data.
2.8.17	System Integrations	HelpDesk Systems Integration	The solution integrates with helpdesk platforms such as Zendesk, ClickDesk, HelpScout, LiveHelpNow, Zoho Desk, etc. to create and view service ticket histories, and respond to inquiries.
2.8.18	System Integrations	Web Forms Platform Integration	The solution integrates with online forms platforms such as JotForm, Typeform, Contact Form 7, Gravity Forms, etc. to capture and send new leads, contacts, or accounts from the CRM website, and conduct market research or gather feedback and opinions.
2.8.19	System Integrations	Widgets	The solution provides SDK to create widgets that help embed any third-party service and create interface components into the CRM. The widgets can sync data between the solution and other third-party applications, including operating the application within the CRM and acting on the account's data in real-time.
2.8.20	System Integrations	Webhooks	The solution allows using webhooks to trigger actions in third-party applications every time an event occurs in the CRM.

2.8.21	System Integrations	API/Web Services	The solution provides an API (Application Programming Interface), Web Services for custom integration with other solutions.
3	**TECHNICAL FEATURES**		
3.1.1	Customization	Platform Branding / Themes	The solution can be customized to meet specific needs, even to the extent of making the interface like the existing business software.
3.1.2	Customization	Custom Entities / Objects	The solution allows adding or building custom entities/objects for use in the CRM.
3.1.3	Customization	Custom Fields	The solution allows users to attach custom fields along with the general information such as language skill rating or category specific to a client or a organization and store it in the CRM.
3.1.4	Customization	Custom Forms	The solution allows users to attach multiple fields to a contact related to their buying or spending behavior or any such unique information and allow users to benefit from improved service to its clients and bring costs down.
3.1.5	Customization	Custom Form Layouts	The solution allows customizing page form layouts of the various CRM entities - both bundled and custom.
3.1.6	Customization	Custom Templates	The solution should allow users to create custom templates such as acknowledgment template for an email receipt or thank you email to send to its newcomers or clients periodically.
3.1.7	Customization	Industry Specific Modules	The CRM solution should have unique customizations (or available options) that enable users of immigration and refugee settlement agencies go beyond traditional support services such as case management, intake, and reporting.
3.1.8	Customization	Data Migration	The solution has the capability to migrate customizations created in a development environment to a production environment.
3.2.1	Environment Deployments	On-Premise (Self-hosted) Installation	The system can be installed on-premise to provide a privately hosted system.
3.2.2	Environment Deployments	Cloud-based (Hosted) Access	The system is available as a hosted, Software as a Service (SaaS) offering.
3.2.3	Environment Deployments	Hybrid Configuration	The system can be configured as a hybrid application, with a mixture of on-premise and cloud components.

3.3.1	Email Support	Email Integration	The solution can integrate with corporate email systems, such as Lotus Notes or Exchange.
3.3.2	Email Support	Email Utilities	The solution provides various email composition tools such as advanced spell check, corporate email templates, and attachment management.
3.4.1	Phone Integration	Screen Pops	After integrating the CRM with the phone, the solution checks if the caller ID matches one of the contact's phone numbers in which case, the contact's information will pop-up on the screen.
3.4.2	Phone Integration	Entitlement Checking	The solution facilitates checking of contracts and entitlements in a hassle-free manner and makes sure that service-level agreements (SLAs) are being met.
3.4.3	Phone Integration	Inbound/Outbound	The solution manages inbound and outbound calls from within the CRM, displaying key details of the call (such as the name of the contact, email address, and telephone number) instantly.
3.4.4	Phone Integration	Specific Phone Switch Support	The solution has the capability to switch to another phone with a different number of features in an efficient manner. The solution ensures that there is no data loss during the switch mechanism.
3.4.5	Phone Integration	Outbound Dialing	The solution makes outbound calling simple and profitable for businesses of all sizes. All details of inbound or outbound calls are captured instantly by logging the call details. With the ability to add notes during the call, every vital detail and requirement of the client is stored for future references.
3.4.6	Phone Integration	Compatibility with Standards	The solution has compatibility with VoIP standards for its efficient functioning.
3.5.1	Mobile Device Support	Supported Devices and Protocols	The solution supports various mobile devices and the protocols on which they are running.
3.5.2	Mobile Device Support	Responsive Design	The solution provides users with a consistent experience on any device with a fully responsive web-based platform.
3.5.3	Mobile Device Support	Native Mobile Apps	Applications for Apple iOS, Android devices
3.5.4	Mobile Device Support	Offline Access	The native application offers offline data access and supports to create, read, update, and delete records. It automatically synchronizes the data when an internet connection is available.

3.6.1	Security	User Authentication	The solution allows configuring two-factor authentication for all the users or a group of users using various methods like security questions, one-time passcodes, security tokens, etc.
3.6.2	Security	Single Sign-on and Trusted Authentication	The solution allows configuring SSO to provide automatic access to the users without prompting them to sign-in separately if they have already authenticated themselves into the corporate identity management system.
3.6.3	Security	Role-based Access Control	The system enables user and/or role-based permissions to be configured in order to control what system features and data users can access.
3.6.4	Security	Encryption: Storage and Transmission	The system provides encryption capabilities for data storage and transmission to ensure that data-at-rest and data-in-transit are secure.
3.6.5	Security	Audit Trail	The system can log administrative and user actions, and report on the logged items.
3.6.6	Security	Activity Logs	The solution maintains a record of administrative and user actions and generates a report on such activities.
3.6.7	Security	Data Center Security Standards and Certifications	All security systems should be monitored 24x7x365. There are also standards that data centers need to meet. Some of the standards are ISO 27001, ISO 20000-1, or SOC 1 Type 2, SOC 2 Type 2, and SOC 3. It is important to select a data center that meets these standards.
3.6.8	Security	Location / IP Blocking	Ability to configure locations from being blocked or white-listed to restrict remote unauthorized device access by IP or geolocation?
3.6.9	Security	Compliance	The solution complies with various regulations like GDPR, CAN-SPAM, PCI DSS, etc.
3.7.1	Fault Tolerance	Backups and Snapshots	The system provides tools to aid in creating routine data backups and point-in-time snapshots to protect against data loss.
3.7.2	Fault Tolerance	Data Restoration	The system provides tools to aid in restoring system data from a backup or snapshot to facilitate recovery.
3.7.3	Fault Tolerance	Data Center Redundancy	The vendor provides high availability isolation of data center redundancy by regional centers.
3.8.1	Availability and Scalability	Scalability	The system easily scales to support changing throughput.

3.8.2	Availability and Scalability	Infrastructure and Data Location	Does the vendor support regional environment provisioning and data location within Canada? Is data replicated outside regional deployment?
3.8.3	Availability and Scalability	High Availability	The system provides for high availability through means such as redundant backup servers, cloud nodes, or other methods.
3.9.1	License Type	Open Source	The software is available as an open-source, free to use license, such as Apache or GPL.
3.9.2	License Type	Proprietary / Commercial	The software is available with a paid commercial or proprietary license.
3.9.3	License Type	SaaS Subscription Model	Does the vendor offer a monthly, annual, or term-based license subscription?
3.9.4	License Type	Number of Users Restriction	Does the vendor provide a per user, per device, or mixed client access licensing options, e.g., volunteers perform rotating shifts and share a device - does each require a user access license?
3.10.1	Operating Systems	Desktop OS Support	Windows, MacOS, Linux
3.10.2	Operating Systems	Web Browser Support	Microsoft Edge (IE), Chrome, Safari, Firefox
3.10.3	Operating Systems	Mobile Device OS Support	Apple iOS, Android, BlackBerry
3.11.1	Development Environment	Customization	The solution has a configuration or customization interface which non-developers use to alter or enhance the system.
3.11.2	Development Environment	Configuration Deployment Migration	The solution can deploy customizations and configurations from a sandbox, staging and UAT environments to a production environment.
3.11.3	Development Environment	Development Tools	The solution should provide a set of programmatic and visual tools and a development workbench for building reports, dashboards, queries, and analysis.
3.11.4	Development Environment	Standard Script/Programming Language	The solution has a standard programming language. CRM API should be independent of programming languages, allowing users to develop applications in any programming language (Java, .Net, C, C++, PHP, etc.).

3.11.5	Development Environment	IDE Support	The solution supports integration with common development environments such as Microsoft Visual Studio or Eclipse to facilitate customization and plugin development.
4	**SUPPORT and SERVICES**		
4.1.1	User Support	Configurable User Preferences	Does the solution offer users' individual settings preferences, such as: date format, time zone, personal templates, scheduled working hours, language, etc.
4.1.2	User Support	Phone and Email	Does the vendor offer Help Desk support via telephone and email?
4.1.3	User Support	Chat and Instant Message	Does the vendor offer Help Desk support via instant message/chat for ease of live communication?
4.1.4	User Support	24x7 Technical Support	Does the vendor offer 24x7 technical support to address off-hour issues?
4.1.5	User Support	User Forums / Community Support	Does the product have a community support forum for system users to interact and provide assistance to one another?
4.1.6	User Support	FAQs	The solution provides a section for 'Frequently Asked Questions' on the vendors website.
4.1.7	User Support	Knowledge-base	Does the vendor offer a centralized, web-accessible knowledge base of articles and assets for self-directed support?
4.2.1	Maintenance	Maintenance Contracts	Does the vendor offer maintenance contracts for supported software to ensure that updates, upgrades, and services are regularly received?
4.2.2	Maintenance	On-site maintenance	Does the vendor provide on-site maintenance support?
4.2.3	Maintenance	Guaranteed Uptime SLA	Is a formal service level agreement (SLA) published or available for review? Does the vendor accept penalties if the SLA terms are violated?
4.3.1	Consulting and Professional Services	Implement-ation Services	Does the vendor offer software implementation services including system evaluation and installation to minimize the on-premise expertise required to implement the solution?
4.3.2	Consulting and Professional Services	Partner Implementation Services	Does the vendor have skilled implementation partners to perform deployment, customization, implementation, and maintenance services for the solution?

4.4.1	Training	Training Materials	Does the vendor offer training services, classes, or other instructional services?
4.4.2	Training	In-product Help and Suggestions	Does the vendor offer in-product help and suggestions within the application to help the user get started using the product?
4.4.3	Training	Certifications	Does the vendor offer testing and certification programs to certify product users, administrators, and developers?
4.4.4	Training	Live Training	Does the vendor provide free live training?
4.5.1	Managed Service Delivery	Finance	Does the vendor provide a finance option that encompasses user training and support as well as implementation and customization services bundled and amortized as per user/month plan?
5	**VENDOR PROFILE**		
5.1.1	Past Performance	Previous Experience	Has the vendor been engaged before? If so, what was the experience and overall value?
5.1.2	Past Performance	Customer Recommend-ation	Is the vendor highly recommended by other customers?
5.2.1	Vendor Information	Financial Stability	Is the vendor financially stable, as evidenced by a Dun&Bradstreet or similar report, indicating that the vendor will not have issues in providing future work?
5.2.2	Vendor Information	Customer Base	Does the vendor have a broad customer base in the industry, lending credence to the vendor's overall quality?
5.2.3	Vendor Information	Public Entity	Is the vendor a public company?
5.2.4	Vendor Information	Product Investment	Does the vendor share their financial commitment to product maintenance and new feature development?
5.2.5	Vendor Information	Published Product Roadmap	Does the vendor publicly publish a product roadmap of features, enhancement, and bug fixes?
5.2.6	Vendor Information	Product Release Cadence	Does the vendor provide major updates monthly, quarterly, or annual basis?
5.2.7	Vendor Information	Conferences and Events	Does the vendor host annual customer and partner events?

5.3.1	Partner Ecosystem	Implement-ation Service Partners	Does the vendor have or recommend software implementation partners: including solution evaluation and installation, to minimize the internal resource expertise required to implement the solution?
5.3.2	Partner Ecosystem	ISV Product Partners	Does the vendor maintain Independent Software Vendors (ISV) partners to address product gaps?
5.3.3	Partner Ecosystem	3rd Party Application Directory	Does the vendor offer a marketplace of partner offerings that enhance or extend the solutions capabilities? If so, roughly how many partner solutions?
5.3.4	Partner Ecosystem	Recommend-ed Partner Solutions	Does the vendor recommend any specific, exemplary partner offerings to enhance or extend the solution's capabilities?
6	**INDEPENDENT REVIEWS**		
6.1.1	Top Analyst and Community Reviews	Top Analyst and Community Reviews	Quotes, summary comments and reviews from community users and analyst reports and leaderboards from firms like G2, Capterra and Gartner.
6.2.1	Social Media Reviews	Company's Social Media Presence	The Company should have an official Facebook account or any recognized social media platforms like LinkedIn or Twitter. The Company should also be responsive to new inquiries / customer queries through their dashboard/profile page on such social platforms.

APPENDIX IV – COMPARISON MATRIX

This is a side-by-side summary comparison example of 2 vendors' solutions ratings, organized by functional subgroups, performed after ranking and scoring the solution capabilities against Solution Requirements included herein.

Index		Solution A Rating	Solution B Rating
1	**KEY REQUIREMENTS**	**96**	**65**
1.1	Client Management	**98**	**94**
1.2	Client Interaction Management	**97**	**77**
1.3	Marketing and Campaign Management	**100**	**31**
1.4	Workflow Automation	**97**	**46**
1.5	Web Portals	**87**	**51**
1.6	Service Provisioning	**98**	**93**
2	**FUNCTIONAL REQUIREMENTS**	**90**	**40**
2.1	Platform Features	**87**	**67**
2.2	Platform Capabilities	**91**	**57**
2.3	Business Intelligence and Reporting	**100**	**64**
2.4	Knowledge Management	**86**	**71**
2.5	Email Communication	**98**	**35**
2.6	SMS Message Communication	**95**	**0**
2.7	Social Media Integration	**80**	**21**
2.8	System Integrations	**88**	**9**
3	**TECHNICAL FEATURES**	**89**	**65**
3.1	Customization	**100**	**79**
3.2	Environment Deployments	**75**	**75**
3.3	Email Support	**100**	**40**
3.4	Phone Integration	**33**	**8**
3.5	Mobile Device Support	**100**	**33**
3.6	Security	**100**	**74**

3.7	Fault Tolerance	100	93
3.8	Availability and Scalability	100	78
3.9	License Type	75	75
3.1	Operating Systems	100	100
3.11	Development Environment	100	66
4	**SUPPORT and SERVICES**	96	77
4.1	User Support	85	58
4.2	Maintenance	96	77
4.3	Consulting and Professional Services	100	60
4.4	Training	100	90
4.5	Managed Service Delivery	100	100
5	**VENDOR PROFILE**	60	62
5.1	Past Performance	22	100
5.2	Vendor Information	85	88
5.3	Partner Ecosystem	75	0
6	**INDEPENDENT REVIEWS**	52	75
6.1	Top Analyst and Community Reviews	55	50
6.2	Social Media Reviews	50	100

APPENDIX V – SOLUTION DIRECTORY

The CRM market is a highly fragmented and extremely busy software segment, at last count there were +650 solutions available (https://www.g2.com/categories/crm), so it is safe to say there is a solution out there for everyone at all price points.

Unlike generic CRM systems and traditional "non-profit solutions" like Blackbaud Raiser's Edge that primarily focus on fundraising activities, contributor donations, and funding sources – the solutions profiled below were developed expressly as industry-specific vertical solutions for the needs of Canadian immigrant-serving settlement agencies. The exception being pure Platform solutions that require new applications to be built from scratch.

Note: *This information is provided on an as-is basis and may be subject to change at any time. It is provided as a resource to aid in selecting your own solution. AMSSA does not endorse or recommend any of the solutions profiled.*

Apricot by Social Solutions

PROFILE		
Apricot		by **Social Solutions**
		10801 North Mopac Expressway, Austin, TX
Our comprehensive, secure non-profit software is designed to create and expand programs with ease. We go beyond the back office with collaboration and engagement capabilities — because everything we do is centered on the experience of the people you serve. And with solutions that are intuitive and easy to use, our software frees up your staff to focus on your mission.		socialsolutions.com
		(877) 441-2111
		Jason Ramirez / jramirez@socialsolutions.com
		Employees: 350+

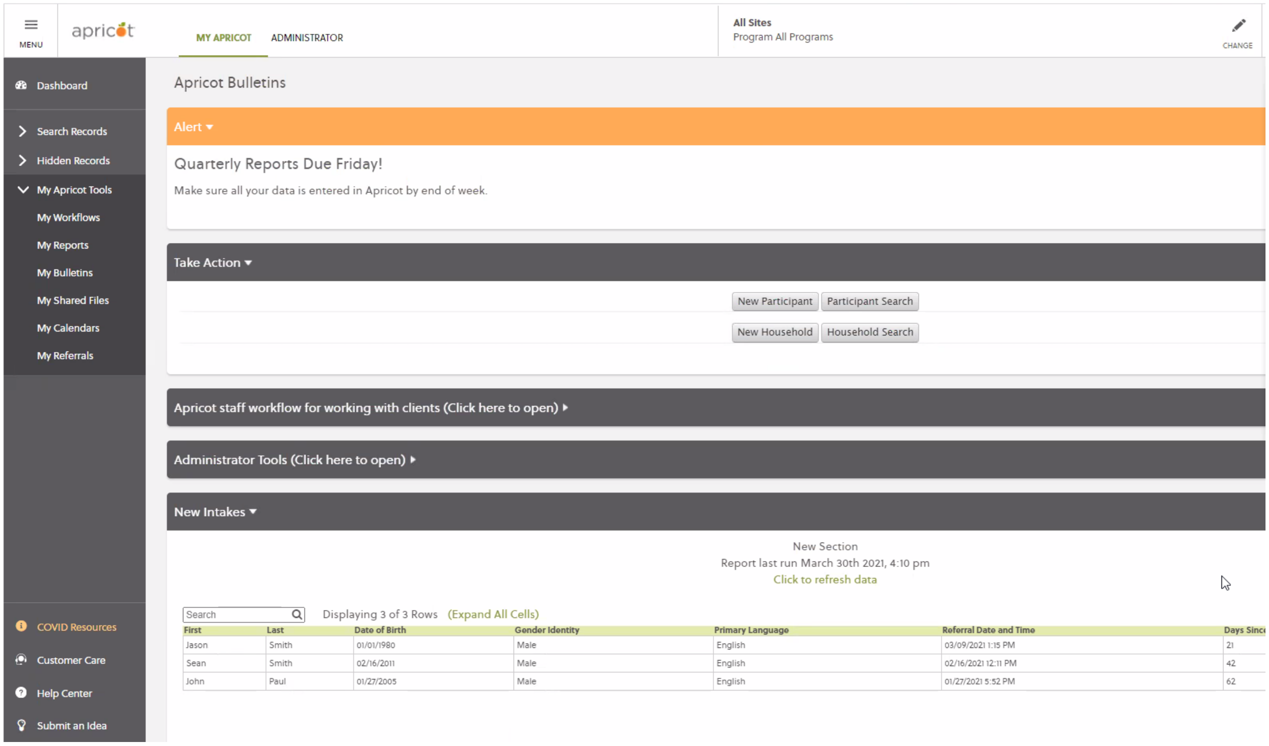
SOLUTION DETAILS	
Product URL	N/A
Demo	Personalized demo available
Solution Type	Commercial Application
Deployment Options	Cloud
Product Lifecycle Stage	Growth
Licensing Model	Subscription - Annual license with one-time implementation and training fee
Canadian Deployments	20+

KEY FEATURES					
Client Management	✔		Role-based Permissions	✔	
Case Management	✔		Customizable Entities, Fields, Forms	✔	
Activity Management	✔		Customizable Data Model	✔	
Intake, Assessment and Eligibility Forms	✔		Customizable Dashboards	✔	Partial
Settlement, Resettlement Services	✔		Standard Reporting	✔	
Employment Services	✔		Advanced Intelligence and Analytics	✔	
Jobs Development	✔	Requires customization	Data Import/Export	✔	

Language and Learning Services	✅		Email Integration	✅	Tracking included
Community and Family Counselling Services	✅		SMS Message Integration	✅	
Volunteer Management	✅		Microsoft Office / Office 365 Integration	✓	Calendar only
Survey Management	✅		Google Workplace (GSuite) Integration	✓	Calendar only
Basic Expense Tracking	✓	Requires customization	Mobile Browser Access	✅	
iCARE Bulk Upload	✅		Mobile Native Apps	⊗	
Real-time Notifications / Alerts	✅		Canadian Data Hosting	✅	
Customizable Workflows and Process Automation	⊗	System workflows only	API / Web Services	✅	
Document and File Management	✅		Implementation Service Partners	✅	
Web Portals	✅		ISV Product Partners	⊗	
Multi-Language (Localization)	✓	Forms may be localized independently; Google translate function embedded, Resources English-only	Third Party Application Directory	⊗	

USER SUPPORT OPTIONS					
Email	✅	Application Videos	✅	Webinars	⊗
Phone	✅	In-app Help / Tickets	⊗	Knowledge Base	✅
Chat	✅	Customer Portal	⊗	Community Forum	⊗

Apricot USER INTERFACE EXAMPLE



Accountability and Resource Management System (ARMS)

by ARMS Inc.

PROFILE		
ARMS (Accountability and Resource Management System)		by **ARMS Inc.**
		401 Empire Avenue, St. John's, NL
Accountability Resource Management System Inc. (ARMS) is a case management system designed to track and manage clients, case files, program activities, outcomes, and results.		armsonline.ca
		(800) 289-1407
		John Clarkson / jclarkson@armsonline.ca
		Employees: <20

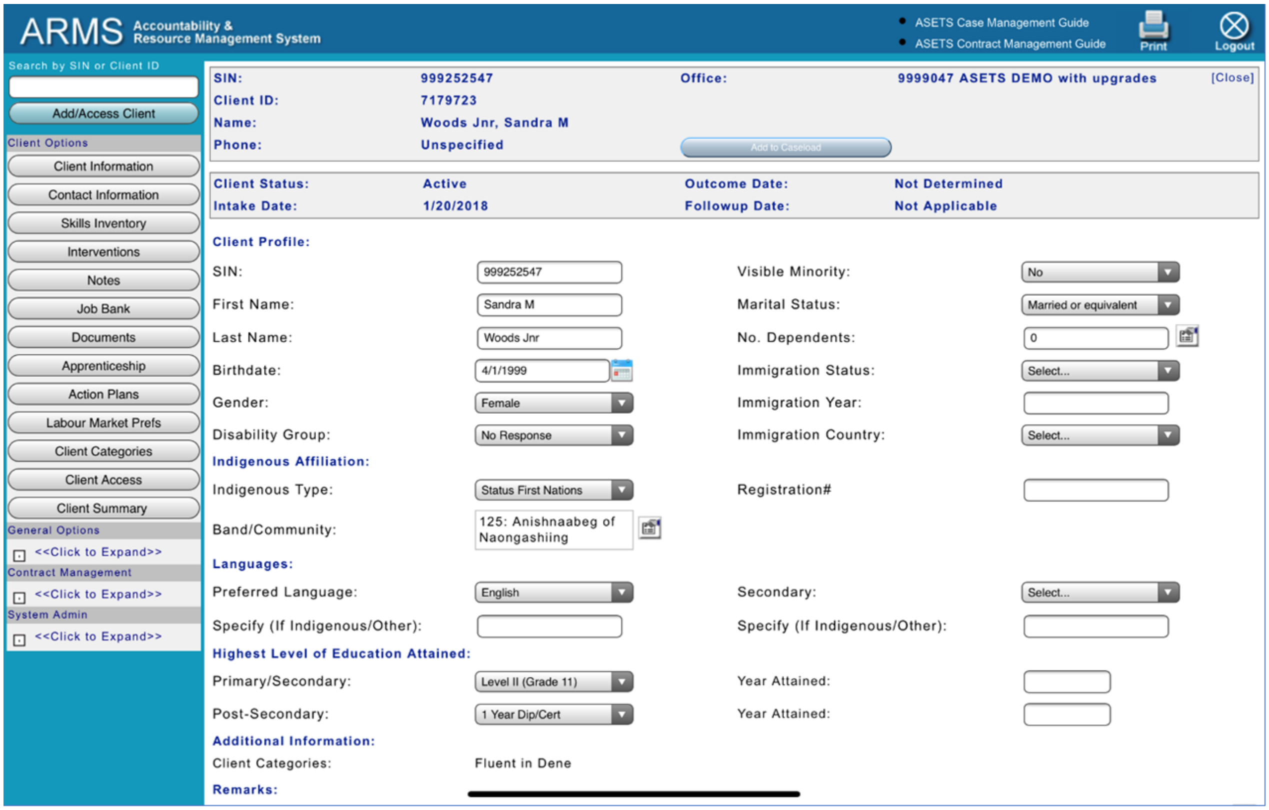
PRODUCT DETAILS	
Product URL	N/A
Demo	Personalized demo available
Solution Type	Commercial Application
Deployment Options	Cloud (private)
Product Lifecycle Stage	Growth
Licensing Model	Custom - One-time licensing and setup fee, plus a monthly support and hosting fee
Canadian Deployments	<10

KEY FEATURES					
Client Management	✔		Role-based Permissions	✔	
Case Management	✔		Customizable Entities, Fields, Forms	✓	Requires Vendor customization
Activity Management	✔		Customizable Data Model	✓	On roadmap
Intake, Assessment and Eligibility Forms	✓	Requires customization	Customizable Dashboards	✓	Not customizable
Settlement, Resettlement Services	✓	Requires customization	Standard Reporting	✔	
Employment Services	✔		Advanced Intelligence and Analytics	✗	
Jobs Development	✔		Data Import/Export	✔	Vendor-assisted

Language and Learning Services	⊗		Email Integration	✓	On roadmap
Community and Family Counselling Services	✔		SMS Message Integration	⊗	
Volunteer Management	⊗		Microsoft Office / Office 365 Integration	⊗	
Survey Management	✓	Requires customization	Google Workplace (GSuite) Integration	⊗	
Basic Expense Tracking	✔		Mobile Browser Access	✔	
iCARE Bulk Upload	✔		Mobile Native Apps	⊗	
Real-time Notifications / Alerts	✓	In-app reminders and follow-ups, Emails on roadmap	Canadian Data Hosting	✔	
Customizable Workflows and Process Automation	✓	Embedded system workflows, Custom processes built by Vendor	API / Web Services	⊗	
Document and File Management	✔		Implementation Service Partners	⊗	
Web Portals	✓	Employer portal	ISV Product Partners	⊗	
Multi-Language (Localization)	✓	Partial, Resources English-only	3rd-Party Application Directory	⊗	

USER SUPPORT OPTIONS					
Email	✔	Application Videos	✔	Webinars	✔
Phone	✔	In-app Help / Tickets	⊗	Knowledge Base	✔
Chat	⊗	Customer Portal	⊗	Community Forum	⊗

ARMS USER INTERFACE EXAMPLE



Better Outcomes by Protegra

PROFILE		
Better Outcomes		by **Protegra**
		146 Commerce Drive, Winnipeg, MB
We provide end-to-end custom software services with a focus on the management of operations and the leveraging of big data and business intelligence for sectors including education and employment, childcare, health care, residential nursing, medical transportation, and manufacturing.		protegra.com
		(204) 487-5664
		betteroutcomes.info@protegra.com
		Employees: <40

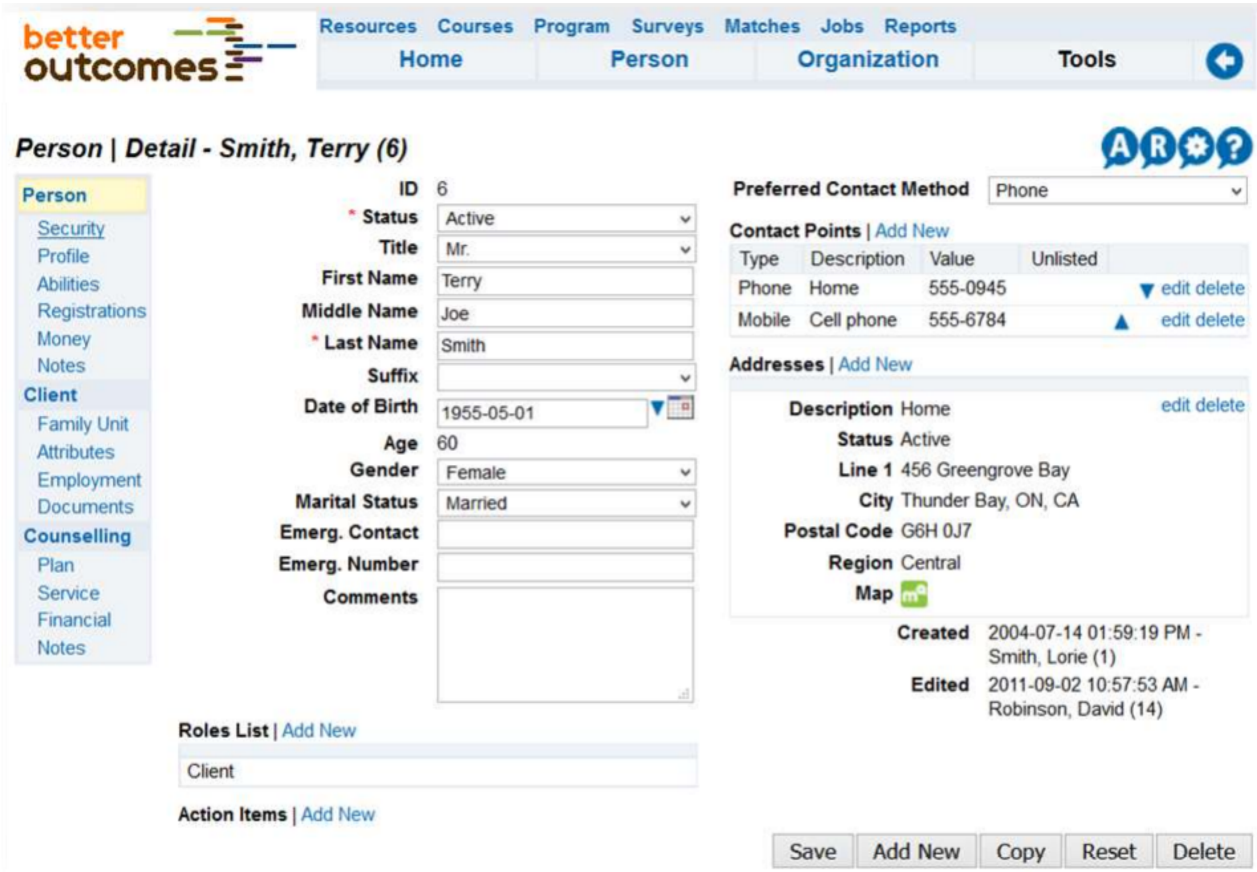
PRODUCT DETAILS	
Product URL	https://betteroutcomes.protegra.com/
Demo	Personalized demo available
Solution Type	Commercial Application
Deployment Options	Cloud (private)
Product Lifecycle Stage	Mature
Licensing Model	Subscription - Annual/monthly per user, plus Initial setup and Implementation fee
Canadian Deployments	30+

KEY FEATURES					
Client Management	✔		Role-based Permissions	✔	
Case Management	✔		Customizable Entities, Fields, Forms	✔	
Activity Management	✔		Customizable Data Model	✓ (partial)	Single user-defined entity with multiple fields
Intake, Assessment and Eligibility Forms	✔		Customizable Dashboards	✗	
Settlement, Resettlement Services	✔		Standard Reporting	✔	
Employment Services	✔		Advanced Intelligence and Analytics	✗	
Jobs Development	✔		Data Import/Export	✔	

Language and Learning Services	✓		Email Integration	✗	
Community and Family Counselling Services	✓		SMS Message Integration	✗	
Volunteer Management	✓		Microsoft Office / Office 365 Integration	✗	
Survey Management	✓		Google Workplace (GSuite) Integration	✗	
Basic Expense Tracking	✓		Mobile Browser Access	✓	
iCARE Bulk Upload	✓		Mobile Native Apps	✗	
Real-time Notifications / Alerts	✗		Canadian Data Hosting	✓	
Customizable Workflows and Process Automation	✗	System workflows only	API / Web Services	✗	
Document and File Management	✓		Implementation Service Partners	✗	
Web Portals	✓		ISV Product Partners	✗	
Multi-Language (Localization)	✓	Browser translation, Forms may be localized independently, Resources English-only	3rd-Party Application Directory	✗	

USER SUPPORT OPTIONS					
Email	✓	Application Videos	✗	Webinars	✗
Phone	✓	In-app Help / Tickets	✓	Knowledge Base	✓
Chat	✗	Customer Portal	✓	Community Forum	✗

Better Outcomes USER INTERFACE EXAMPLE



CARMIS by NSD Tech Inc.

PROFILE		
CARMIS		by **NSD Tech Inc.**
		215 – 10 Fort Street, Winnipeg, MB
CARMIS is an innovative artificial intelligence-based robust case management system. It is the complete solution to the challenges faced by non-profit agencies of all sizes serving newcomers, immigrants, refugees, refugee claimants and citizens.		nsdtech.com
		(204) 421-1421
		support@carmis.ca
		Employees: <20

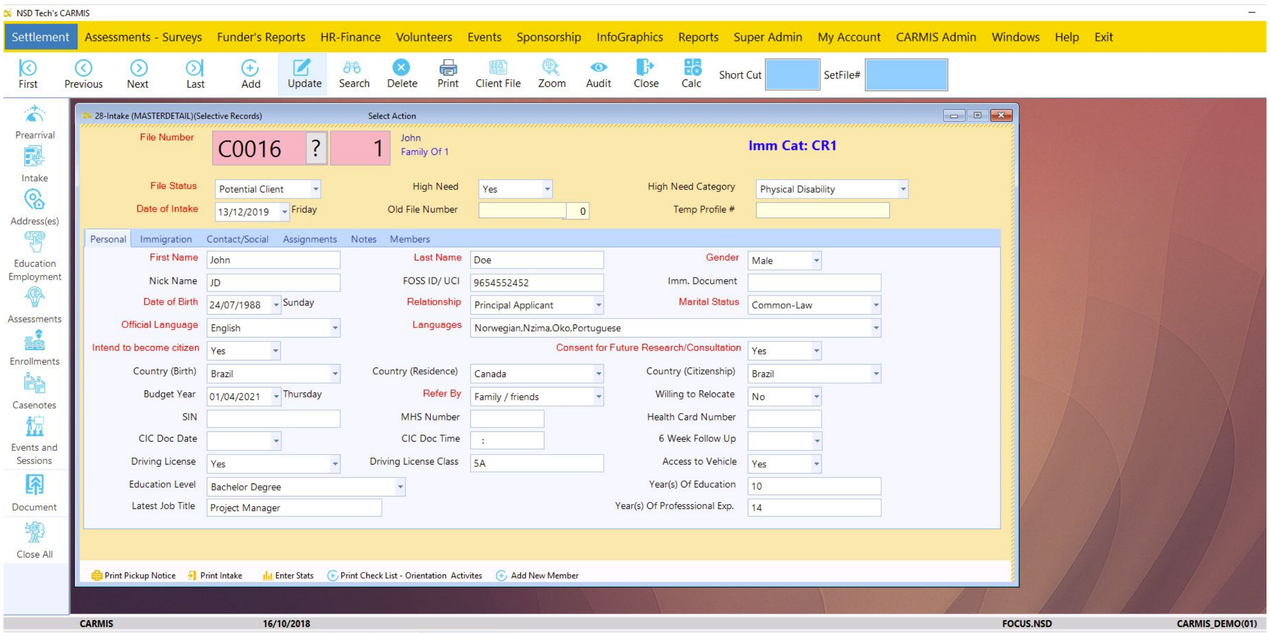
PRODUCT DETAILS	
Product URL	https://carmis.ca
Demo	https://youtu.be/I5Nwb7hDLY0
Solution Type	Commercial Application
Deployment Options	Cloud, On-premise
Product Lifecycle Stage	Growth
Licensing Model	Hybrid - Cloud <200 users, On-premise option for 200+ users
Canadian Deployments	10+

KEY FEATURES					
Client Management	✔		Role-based Permissions	✔	
Case Management	✔		Customizable Entities, Fields, Forms	✔	
Activity Management	✔		Customizable Data Model	✔	Requires Vendor customization
Intake, Assessment and Eligibility Forms	✔		Customizable Dashboards	✓	Not customizable
Settlement, Resettlement Services	✔		Standard Reporting	✔	
Employment Services	✔		Advanced Intelligence and Analytics	✓	Microsoft Power BI
Jobs Development	✔		Data Import/Export	✔	
Language and Learning Services	✔		Email Integration	✓	Individual outbound

					message sending
Community and Family Counselling Services	✔		SMS Message Integration	✗	
Volunteer Management	✔		Microsoft Office / Office 365 Integration	✔	
Survey Management	✔		Google Workplace (GSuite) Integration	✗	
Basic Expense Tracking	✓	Partial	Mobile Browser Access	✔	
iCARE Bulk Upload	✔		Mobile Native Apps	✗	
Real-time Notifications / Alerts	✓	Email reminders and follow-ups	Canadian Data Hosting	✔	
Customizable Workflows and Process Automation	✓	On roadmap	API / Web Services	✗	
Document and File Management	✔		Implementation Service Partners	✗	
Web Portals	✔		ISV Product Partners	✗	
Multi-Language (Localization)	✓	On roadmap (French)	3rd-Party Application Directory	✗	

USER SUPPORT OPTIONS					
Email	✔	Application Videos	✔	Webinars	✗
Phone	✔	In-app Help / Tickets	✔	Knowledge Base	✔
Chat	✔	Customer Portal	✗	Community Forum	✗

CARMIS USER INTERFACE EXAMPLE



CaseWORKS by Coyote Software Corporation

PROFILE

CaseWORKS		by **Coyote Software Corporation**
		216 - 3425 Harvester Road, Burlington, ON
CaseWORKS Caseload Management Software is a web-based solution designed to support the case management, data collection and reporting needs of health and social service organizations. CaseWORKS gives you the ability to manage workflows, coordinate service delivery and quickly track any information necessary to support clients and generate funder and other stakeholder reports.		coyotecorp.com
		(905) 639-8533
		Mike Doutre / mdoutre@coyotecorp.com
		Employees: <20

PRODUCT DETAILS

Product URL	https://www.coyotecorp.com/caseworks
Demo	Personalized demo available
Solution Type	Commercial Application
Deployment Options	Cloud (private), On-premise
Product Lifecycle Stage	Mature
Licensing Model	Hybrid - Agency license fee (scaled by agency size), Implementation services as-needed
Canadian Deployments	100+

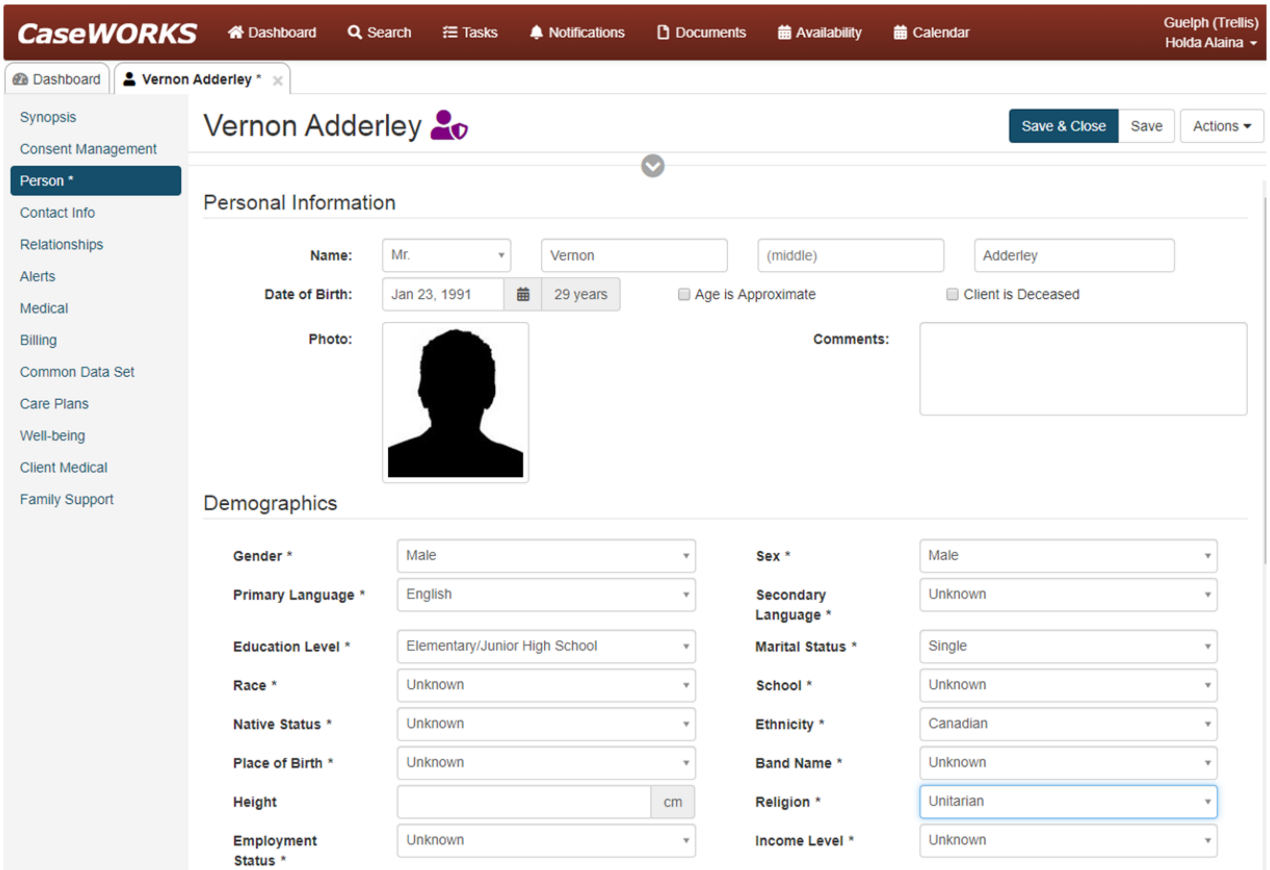
KEY FEATURES

Client Management	✔		Role-based Permissions	✔	
Case Management	✔		Customizable Entities, Fields, Forms	✓	Requires Vendor customization
Activity Management	✔		Customizable Data Model	✓	Requires Vendor customization
Intake, Assessment and Eligibility Forms	✔		Customizable Dashboards	✓	Partial
Settlement, Resettlement Services	✔		Standard Reporting	✔	
Employment Services	✔		Advanced Intelligence and Analytics	✔	
Jobs Development	⊗		Data Import/Export	✔	

Language and Learning Services	✔		Email Integration	✓	On roadmap
Community and Family Counselling Services	✔	Yes	SMS Message Integration	✓	On roadmap
Volunteer Management	✓	Requires customization	Microsoft Office / Office 365 Integration	✓	On roadmap
Survey Management	⊗		Google Workplace (GSuite) Integration	⊗	
Basic Expense Tracking	✓	Optional billing module	Mobile Browser Access	✔	
iCARE Bulk Upload	✔		Mobile Native Apps	✓	On roadmap
Real-time Notifications / Alerts	✔		Canadian Data Hosting	✔	
Customizable Workflows and Process Automation	✔		API / Web Services	✔	Coyote Interface Exchange
Document and File Management	✔		Implementation Service Partners	⊗	
Web Portals	✓	On roadmap	ISV Product Partners	⊗	
Multi-Language (Localization)	✓	Forms may be localized independently, Resources English-only	3rd-Party Application Directory	⊗	

USER SUPPORT OPTIONS					
Email	✔	Application Videos	✔	Webinars	✔
Phone	✔	In-app Help / Tickets	✔	Knowledge Base	⊗
Chat	✔	Customer Portal	✓	Community Forum	⊗

CaseWORKS USER INTERFACE EXAMPLE



iSTEDY LMS + LARC by iSTEDY.com Inc

PROFILE		
iSTEDY LMS (Learning Case Management) / iSTEDY LARC (Language Assessment Management and Referral Center)		by **iSTEDY.com Inc.**
		200 – 5 Donald St, Winnipeg, MB
We provide end-to-end custom software services with a focus on the management of operations and the leveraging of big data and business intelligence for sectors including education and employment, childcare, health care, residential nursing, medical transportation, and manufacturing.		istedy.com
		(204) 272-0997
		info@istedy.com
		Employees: <20

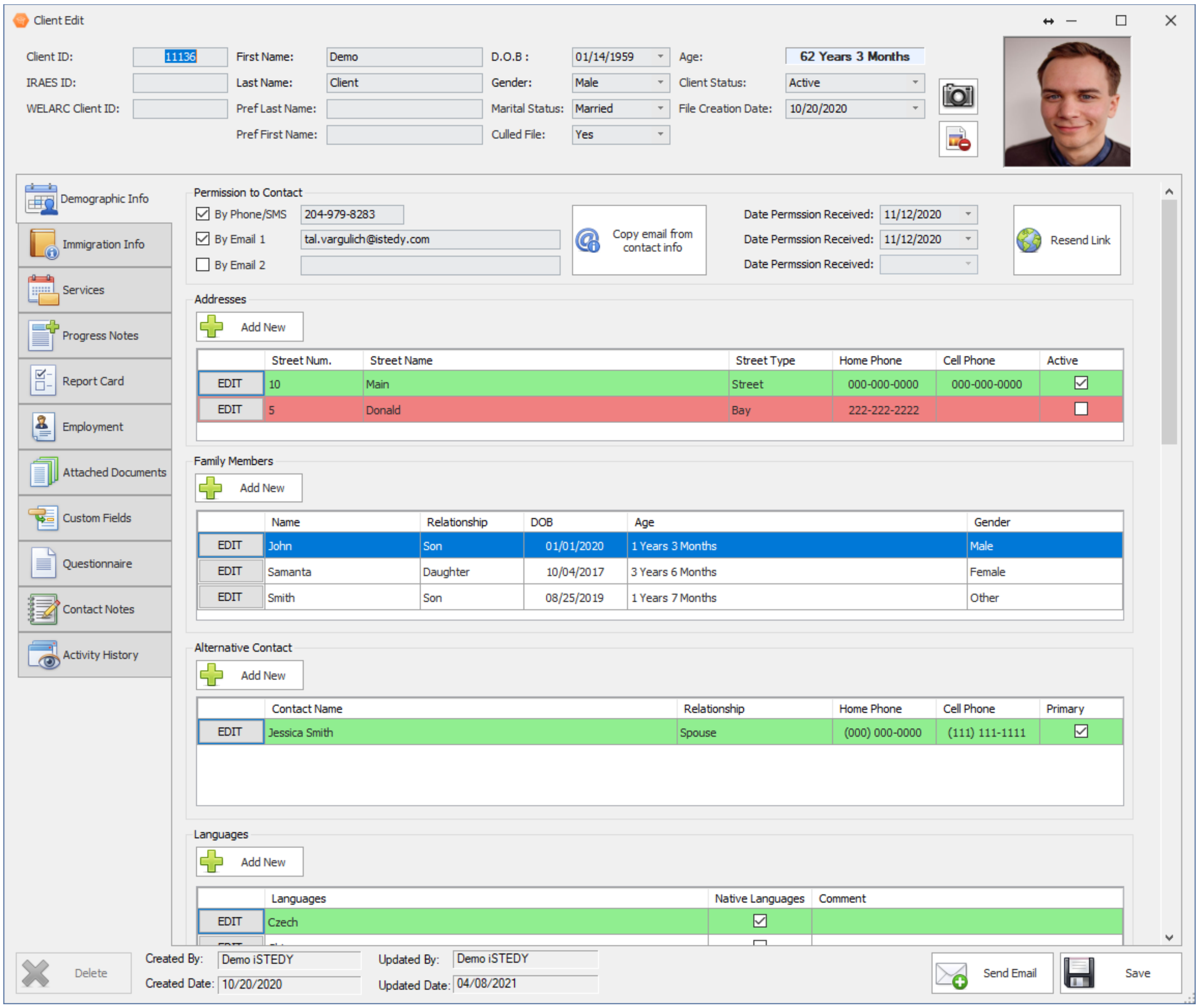
PRODUCT DETAILS	
Product URL	http://istedy.com/istedy-lms-product/
Demo	Personalized demo available
Solution Type	Commercial Application
Deployment Options	Cloud
Product Lifecycle Stage	Growth
Licensing Model	Hybrid - Agency license fee (cost scaled by organization size), Implementation services as-needed
Canadian Deployments	20+

KEY FEATURES					
Client Management	✔		Role-based Permissions	✔	
Case Management	✔		Customizable Entities, Fields, Forms	✓	Requires Vendor customization
Activity Management	✔		Customizable Data Model	✓	Single user-defined entity with multiple fields
Intake, Assessment and Eligibility Forms	✔		Customizable Dashboards	✔	
Settlement, Resettlement Services	✔		Standard Reporting	✔	
Employment Services	✔		Advanced Intelligence and Analytics	✔	

Jobs Development	✔		Data Import/Export	✔	
Language and Learning Services	✔		Email Integration	✔	
Community and Family Counselling Services	✔		SMS Message Integration	✔	
Volunteer Management	✔		Microsoft Office / Office 365 Integration	✗	
Survey Management	✔		Google Workplace (GSuite) Integration	✗	
Basic Expense Tracking	✓	Partial	Mobile Browser Access	✔	
iCARE Bulk Upload	✔	Yes	Mobile Native Apps	✗	
Real-time Notifications / Alerts	✓	Email, SMS, in-app reminders, user reminders for follow-up	Canadian Data Hosting	✔	
Customizable Workflows and Process Automation	✓	Embedded system workflow. Custom processes built by Vendor	API / Web Services	✗	
Document and File Management	✔		Implementation Service Partners	✗	
Web Portals	✔		ISV Product Partners	✗	
Multi-Language (Localization)	✗		3rd-Party Application Directory	✗	

USER SUPPORT OPTIONS					
Email	✔	Application Videos	✗	Webinars	✔
Phone	✔	In-app Help / Tickets	✔	Knowledge Base	✗
Chat	✗	Customer Portal	✔	Community Forum	✗

iSTEDY USER INTERFACE EXAMPLE



Microsoft Dynamics 365 by Microsoft

PROFILE

Microsoft Dynamics 365		by **Microsoft**
		1950 Meadowvale Blvd, Mississauga, ON
Microsoft Cloud for Non-profit aligns capabilities of Microsoft 365, Power Platform, Dynamics 365, Azure and LinkedIn to address common non-profit scenarios—all based on a Common Data Model to unite disparate data sources.		microsoft.com
		(905) 568-0434
		Employees: 10,000+

PRODUCT DETAILS

Product URL	https://www.microsoft.com/en-us/nonprofits/dynamics-365
Demo	30-day Trial
Solution Type	Platform
Deployment Options	Cloud, On-premise
Product Lifecycle Stage	Growth
Licensing Model	Subscription - Annual/monthly per user
Canadian Deployments	Unknown

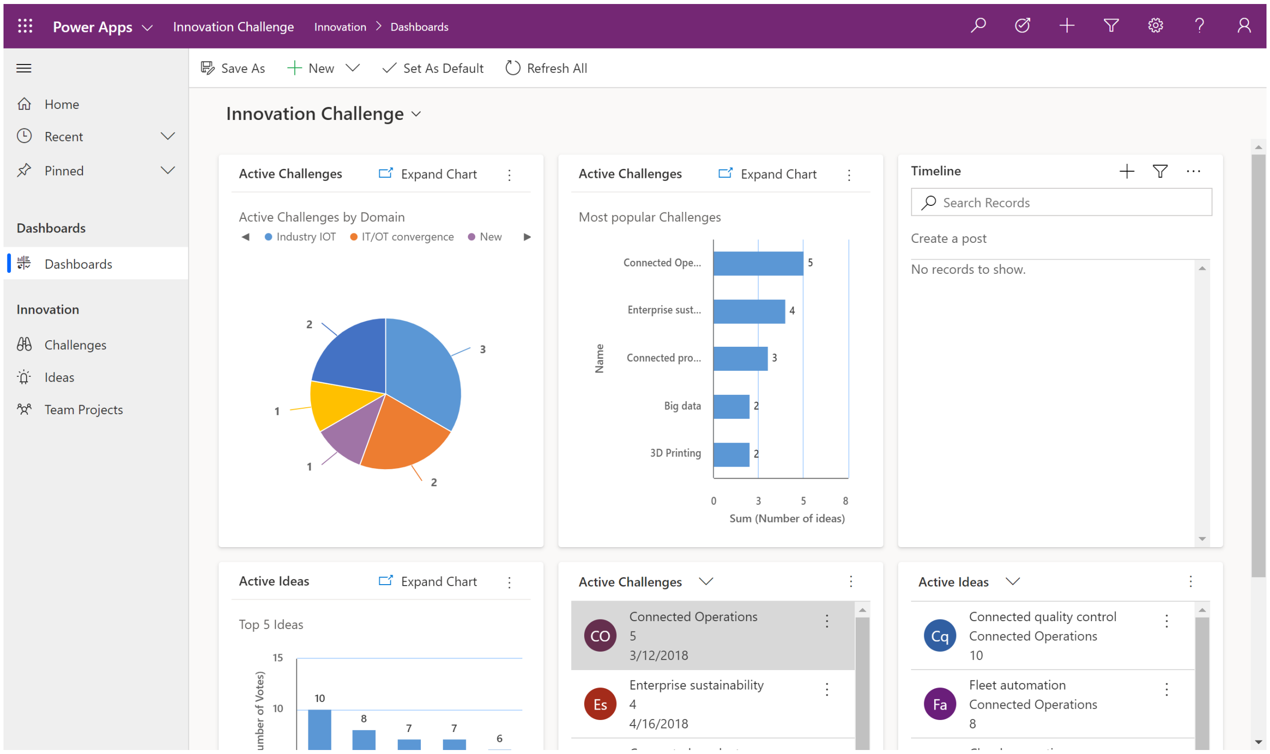
KEY FEATURES

Client Management	✔		Role-based Permissions	✔	
Case Management	✔		Customizable Entities, Fields, Forms	✔	
Activity Management	✔		Customizable Data Model	✔	
Intake, Assessment and Eligibility Forms	✓	Requires customization	Customizable Dashboards	✔	
Settlement, Resettlement Services	✓	Requires customization	Standard Reporting	✔	
Employment Services	✓	Requires customization	Advanced Intelligence and Analytics	✓	Microsoft Power BI
Jobs Development	✓	Requires customization	Data Import/Export	✔	
Language and Learning Services	✓	Requires customization	Email Integration	✔	

Community and Family Counselling Services	✓	Requires customization	SMS Message Integration	✓	On roadmap, 3rd-Party solutions available
Volunteer Management	✓	Requires customization	Microsoft Office / Office 365 Integration	✅	
Survey Management	✓	Requires customization	Google Workplace (GSuite) Integration	✓	3rd-Party solutions available
Basic Expense Tracking	✓	Requires customization	Mobile Browser Access	✅	
iCARE Bulk Upload	✓	Requires customization	Mobile Native Apps	✅	
Real-time Notifications / Alerts	✓	Email, in-app notifications, SMS on roadmap and via 3rd-Party solutions	Canadian Data Hosting	✅	
Customizable Workflows and Process Automation	✅		API / Web Services	✅	
Document and File Management	✅		Implementation Service Partners	✅	
Web Portals	✓	Requires customization	ISV Product Partners	✅	
Multi-Language (Localization)	✓	Platform supports 42 languages; Customizations require independent localization	3rd-Party Application Directory	✅	

USER SUPPORT OPTIONS					
Email	✅	Application Videos	✅	Webinars	✗
Phone	✅	In-app Help / Tickets	✅	Knowledge Base	✅
Chat	✅	Customer Portal	✅	Community Forum	✅

Dynamics 365 USER INTERFACE EXAMPLE



Neon CCM by Neon One, LLC

PROFILE

Neon CCM		by **Neon One, LLC**
		4545 North Ravenswood Ave, Chicago, IL
Neon CCM offers secure, cloud-based solutions for tracking client information, outcome reporting, and so much more. Your software should be easy to manage. That's why we design each Neon CCM system to complement how your team works, from your day-to-day process, right down to the language you use.		neonone.com
		(303) 562-5315
		Marc Bromberg / mbromberg@neonone.com
		Employees: 200+

PRODUCT DETAILS

Product URL	https://neonone.com/products/neon-client-case-management/
Demo	Personalized demo available
Solution Type	Hybrid - Private platform for developing custom, web-based applications
Deployment Options	Cloud
Product Lifecycle Stage	Growth
Licensing Model	Subscription - One-time fee, Monthly Support and Hosting fee, Implementation services as-needed
Canadian Deployments	<10

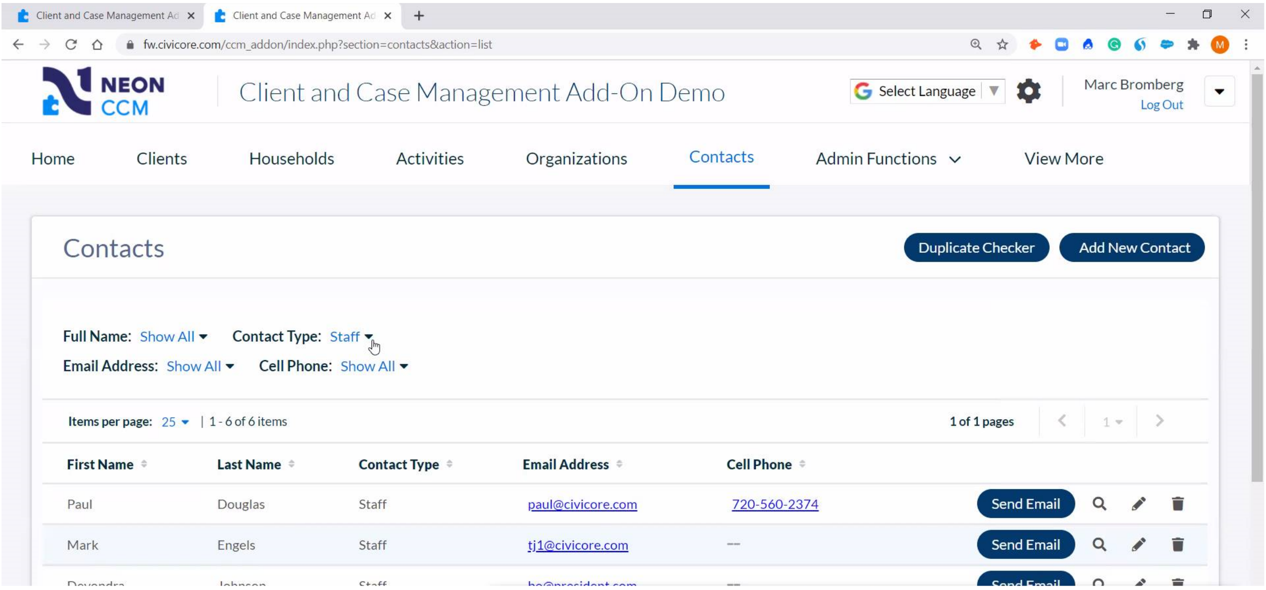
KEY FEATURES

Client Management	✓	Requires customization	Role-based Permissions	✓	
Case Management	✓	Requires customization	Customizable Entities, Fields, Forms	✓	
Activity Management	✓	Requires customization	Customizable Data Model	✓	Requires Vendor customization
Intake, Assessment and Eligibility Forms	✓	Requires customization	Customizable Dashboards	✓	
Settlement, Resettlement Services	✓	Requires customization	Standard Reporting	✓	
Employment Services	✓	Requires customization	Advanced Intelligence and Analytics	✓	

Jobs Development	✓	Requires customization	Data Import/Export	✔	
Language and Learning Services	✓	Requires customization	Email Integration	✓	Individual outbound message sending, Mass email campaigns - no logging or tracking
Community and Family Counselling Services	✓	Requires customization	SMS Message Integration	✓	On roadmap
Volunteer Management	✓	Requires customization	Microsoft Office / Office 365 Integration	⊗	
Survey Management	✓	Requires customization	Google Workplace (GSuite) Integration	⊗	
Basic Expense Tracking	✓	Requires customization	Mobile Browser Access	✔	
iCARE Bulk Upload	✔		Mobile Native Apps	⊗	
Real-time Notifications / Alerts	✓	Email reminders, SMS on roadmap	Canadian Data Hosting	✔	
Customizable Workflows and Process Automation	✔		API / Web Services	✔	Private API / Toolkit
Document and File Management	✔		Implementation Service Partners	⊗	
Web Portals	✓	Requires customization	ISV Product Partners	⊗	
Multi-Language (Localization)	✓	Google translate widget, Resources English-only	3rd-Party Application Directory	⊗	

USER SUPPORT OPTIONS					
Email	✔	Application Videos	⊗	Webinars	⊗
Phone	✔	In-app Help / Tickets	⊗	Knowledge Base	⊗
Chat	⊗	Customer Portal	✔	Community Forum	⊗

Neon CCM USER INTERFACE EXAMPLE



Newcomer Engagement and Empowerment Platform (NEEP)

by INVORG

PROFILE		
Newcomer Engagement and Empowerment Platform (NEEP)		by **INVORG**
		201 - 630 Colborne Street, London, ON
A configurable digital platform that enables agencies to collect, store and manage information of newcomers in a centralized manner to provide services effectively, efficiently, and economically. It enriches the newcomers' experience.		invorg.com
		(877) 583-1510
		innovation@invorg.com
		Employees: 20+

PRODUCT DETAILS	
Product URL	https://www.invorg.com/neep/
Demo	Personalized demo available
Solution Type	Hybrid - Microsoft Dynamics 365 CE (platform) plus INVORG (application)
Deployment Options	Cloud, On-premise
Product Lifecycle Stage	Emerging
Licensing Model	Custom - Based on client requirements
Canadian Deployments	<5

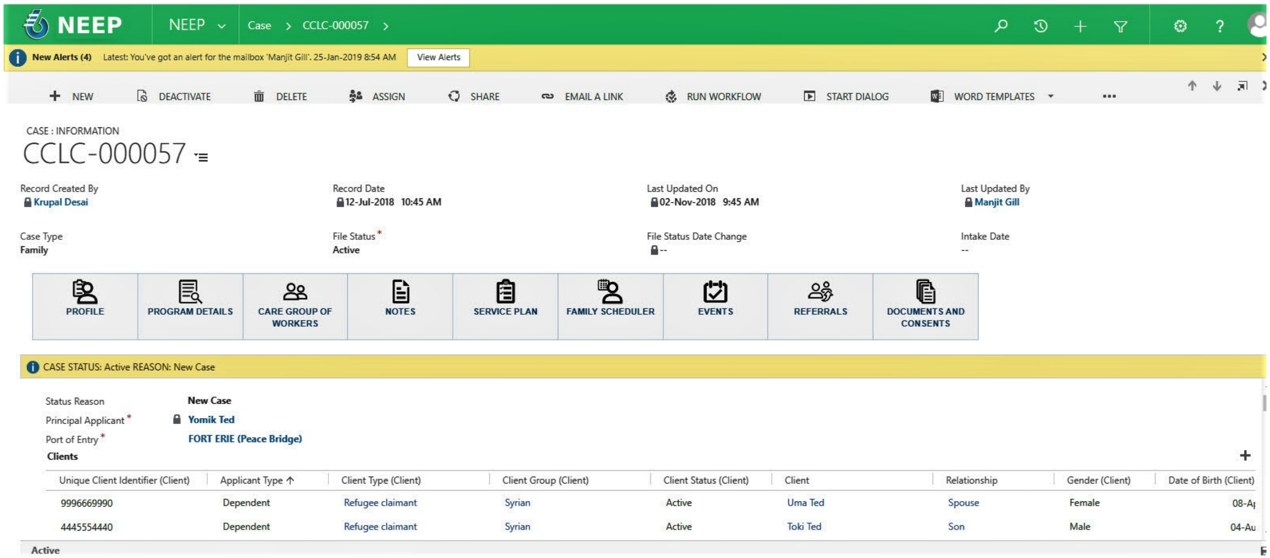
KEY FEATURES					
Client Management	✓		Role-based Permissions	✓	
Case Management	✓		Customizable Entities, Fields, Forms	✓	
Activity Management	✓		Customizable Data Model	✓	
Intake, Assessment and Eligibility Forms	✓		Customizable Dashboards	✓	
Settlement, Resettlement Services	✓		Standard Reporting	✓	

Employment Services	✔		Advanced Intelligence and Analytics	✓	Microsoft Power BI
Jobs Development	✔		Data Import/Export	✔	
Language and Learning Services	✔		Email Integration	✔	
Community and Family Counselling Services	✔		SMS Message Integration	✓	On roadmap
Volunteer Management	✔		Microsoft Office / Office 365 Integration	✔	
Survey Management	✓	On roadmap	Google Workplace (GSuite) Integration	✓	3rd-Party solutions available
Basic Expense Tracking	⊗		Mobile Browser Access	✔	
iCARE Bulk Upload	✔		Mobile Native Apps	✔	
Real-time Notifications / Alerts	✔		Canadian Data Hosting	✔	
Customizable Workflows and Process Automation	✔		API / Web Services	✔	
Document and File Management	✔		Implementation Service Partners	✔	
Web Portals	✓	Requires customization	ISV Product Partners	✔	
Multi-Language (Localization)	✓	Platform supports 42 languages, Application not currently localized (English only) , Resources English-only	3rd-Party Application Directory	✔	Microsoft Dynamics Partners

USER SUPPORT OPTIONS					
Email	✔	Application Videos	⊗	Webinars	⊗
Phone	✔	In-app Help / Tickets *	✓	Knowledge Base *	✓
Chat	✔	Customer Portal *	✓	Community Forum *	✓

* Microsoft-provided Support

NEEP USER INTERFACE EXAMPLE



NewTrack by Immigrant Services Society of BC (ISSofBC)

PROFILE		
NewTrack		by **Immigrant Services Society of BC**
		2610 Victoria Dr. Vancouver, BC
NewTrack is based on the Microsoft Dynamics 365 platform using the full capacity of automation and analytics to enhance client service experiences as well as improved staff-client service delivery, understanding in real time the clients' settlement journey or service touch points through the agency for better internal service coordination and client case management).		issbc.org
		(604) 684-2561
		info@issbc.org
		Employees: 300+

PRODUCT DETAILS	
Product URL	N/A
Demo	Personalized demo available
Solution Type	Hybrid - Microsoft Dynamics 365 Power Apps (platform) plus NewTrack (application)
Deployment Options	Cloud
Product Lifecycle Stage	Emerging
Licensing Model	Hybrid - NewTrack license per user, plus Microsoft Dynamics 365 license, plus Managed Service Provider: per user fee plus Implementation services as-needed
Canadian Deployments	<5

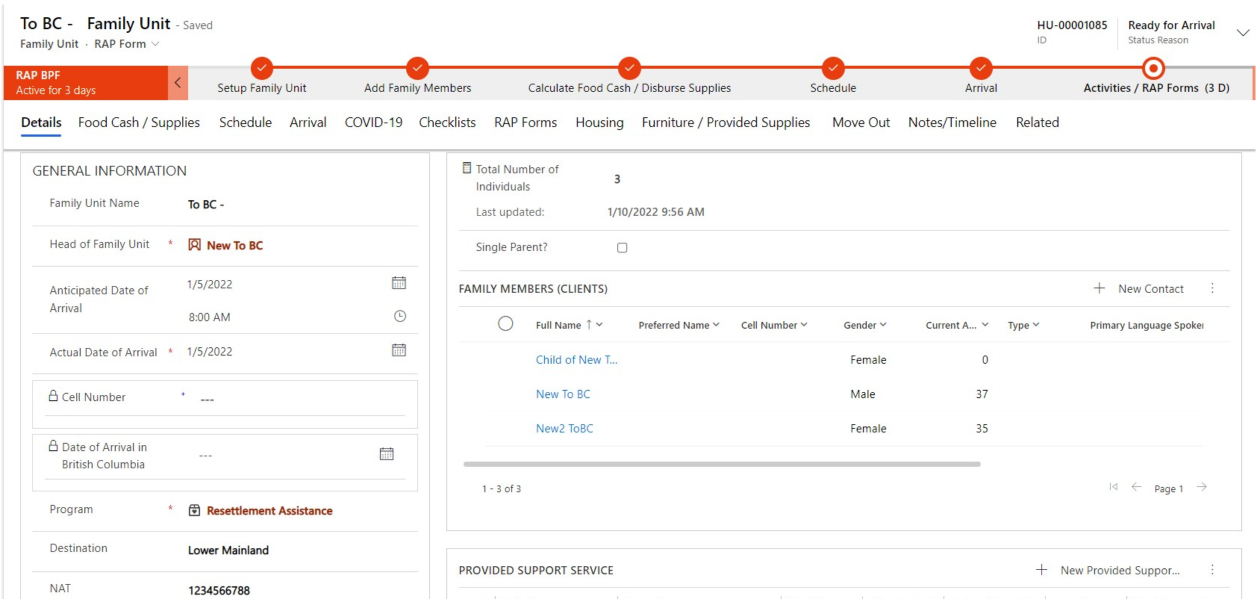
KEY FEATURES					
Client Management	✓		Role-based Permissions	✓	
Case Management	✓		Customizable Entities, Fields, Forms	✓	
Activity Management	✓		Customizable Data Model	✓	
Intake, Assessment and Eligibility Forms	✓		Customizable Dashboards	✓	
Settlement, Resettlement Services	✓		Standard Reporting	✓	
Employment Services	✓		Advanced Intelligence and Analytics	✓	

Jobs Development	✓	Requires customization	Data Import/Export	✅	
Language and Learning Services	✅		Email Integration	✅	
Community and Family Counselling Services	✅		SMS Message Integration	✓	On roadmap
Volunteer Management	✅		Microsoft Office / Office 365 Integration	✅	
Survey Management	✅		Google Workplace (GSuite) Integration	✓	3rd-Party solutions available
Basic Expense Tracking	✅		Mobile Browser Access	✅	
iCARE Bulk Upload	✅		Mobile Native Apps	✅	
Real-time Notifications / Alerts	✅		Canadian Data Hosting	✅	
Customizable Workflows and Process Automation	✅		API / Web Services	✅	
Document and File Management	✅		Implementation Service Partners	✅	
Web Portals	✅		ISV Product Partners	✅	
Multi-Language (Localization)	✓	Platform supports 42 languages, Application not currently localized (English only), , Resources English-only	3rd-Party Application Directory	✓	Microsoft Dynamics Partners

USER SUPPORT OPTIONS					
Email	✅	Application Videos	✅	Webinars	⊗
Phone	✅	In-app Help / Tickets *	✓	Knowledge Base *	✓
Chat	⊗	Customer Portal *	✓	Community Forum *	✓

* Microsoft-provided Support

NewTrack USER INTERFACE EXAMPLE



NewOrg by NewOrg Management System Inc.

PROFILE		
NewOrg Management System		by **NewOrg Management System Inc.**
		3704 Albemarle St NW, Washington, DC
NewOrg is a cloud-based data management system designed to work for almost any kind of non-profit organization. NewOrg is easily customized for even the most complex programs and processes, dramatically reducing the amount of time staff and management spend entering data and counting things.		neworg.com
		(508) 224-5239
		John Baker / jbaker@neworg.com
		<20

PRODUCT DETAILS	
Product URL	https://neworg.com/charityvillage
Demo	Personalized demo available
Solution Type	Commercial Application
Deployment Options	Cloud (private)
Product Lifecycle Stage	Mature
Licensing Model	Hybrid - One-time fee, monthly per user license, Implementation services as-needed
Canadian Deployments	20+

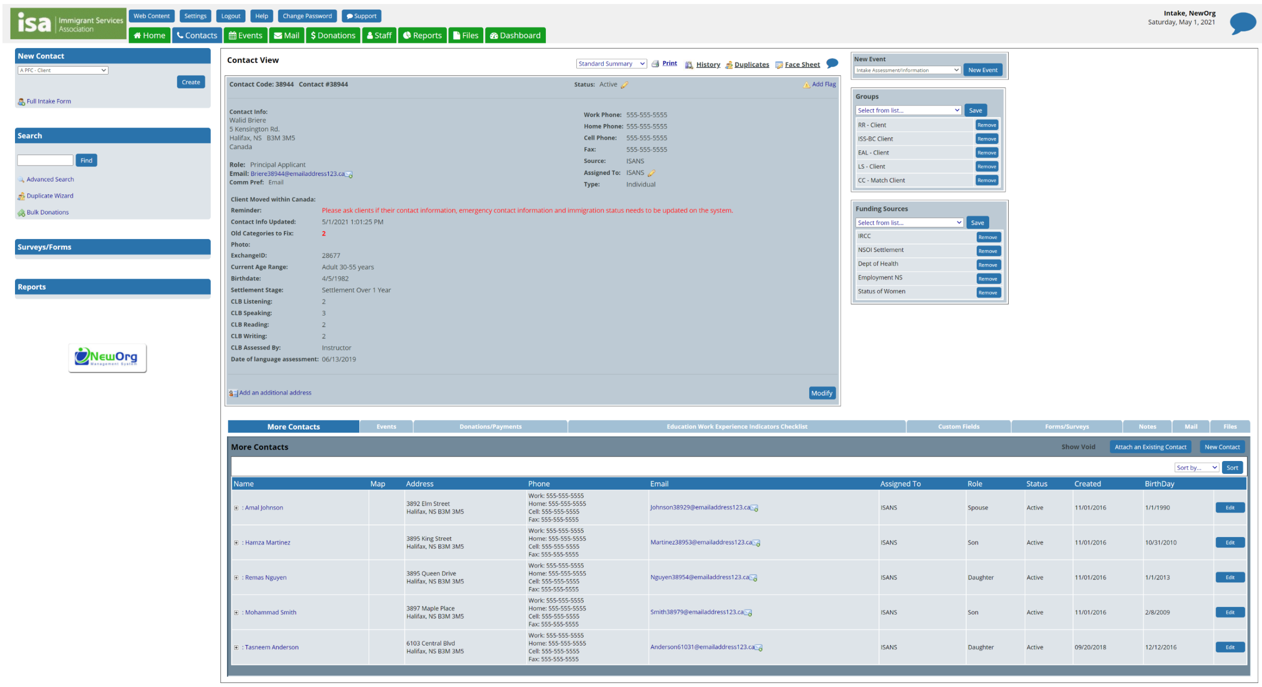
KEY FEATURES					
Client Management	✔		Role-based Permissions	✔	
Case Management	✔		Customizable Entities, Fields, Forms	✓	Requires Vendor customization
Activity Management	✔		Customizable Data Model	✓	Requires Vendor customization
Intake, Assessment and Eligibility Forms	✔		Customizable Dashboards	✔	
Settlement, Resettlement Services	✔		Standard Reporting	✔	
Employment Services	✔		Advanced Intelligence and Analytics	✗	
Jobs Development	✓	On roadmap	Data Import/Export	✔	

Language and Learning Services	✔		Email Integration	✓	Mass email campaigns with logging, response tracking (open/clicks), Individual messages (templates) sent via default mail app
Community and Family Counselling Services	✔		SMS Message Integration	✓	Mass SMS campaigns
Volunteer Management	✔		Microsoft Office / Office 365 Integration	✔	
Survey Management	✔		Google Workplace (GSuite) Integration	✔	
Basic Expense Tracking	✔		Mobile Browser Access	✔	
iCARE Bulk Upload	✔		Mobile Native Apps	⊗	
Real-time Notifications / Alerts	✓	Email and SMS follow-ups	Canadian Data Hosting	✔	
Customizable Workflows and Process Automation	⊗		API / Web Services	✓	On roadmap
Document and File Management	✔		Implementation Service Partners	⊗	
Web Portals	✔		ISV Product Partners	⊗	
Multi-Language (Localization)	✓	Google translate widget, Resources English-only	3rd-Party Application Directory	⊗	

USER SUPPORT OPTIONS

Email	✔	Application Videos	✔	Webinars	⊗
Phone	✔	In-app Help / Tickets	⊗	Knowledge Base	⊗
Chat	⊗	Customer Portal	⊗	Community Forum	⊗

NewOrg USER INTERFACE EXAMPLE



OCMS by Ontario Council of Agencies Serving Immigrants (OCASI)

PROFILE		
OCASI Client Management System (OCMS)		by **Ontario Council of Agencies Serving Immigrants (OCASI)**
		200 - 110 Eglinton Ave West, Toronto, ON
The OCASI Client Management System (OCMS) is a powerful and sophisticated website that can be used by multi-service agencies across Canada to record and retrieve important client information while generating detailed real-time reports on individual and group activities.		ocasi.org
		(416) 322-4950
		ocmssupport@ocasi.org
		Employees: 40+

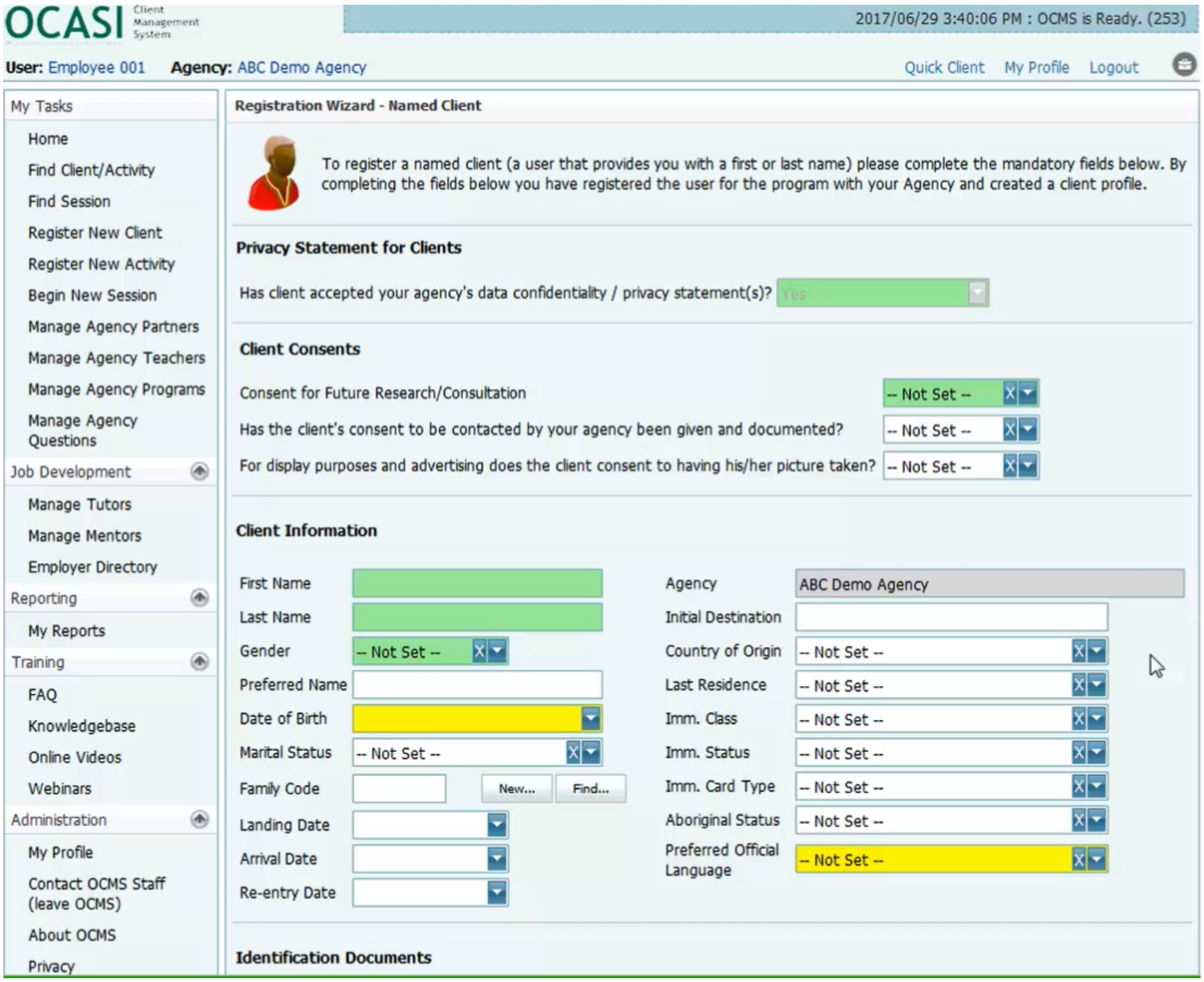
PRODUCT DETAILS	
Product URL	https://ocasi.org/ocasi-client-management-system-ocms
Demo	https://www.ocmscanada.org/guides/OCMSKeyManagementFeatures/index.html
Solution Type	Commercial Application
Deployment Options	Cloud
Product Lifecycle Stage	Mature
Licensing Model	Subscription - Annual/monthly per user, plus Support and maintenance
Canadian Deployments	75+

KEY FEATURES					
Client Management	✔		Role-based Permissions	✔	Vendor-managed Standard roles
Case Management	✔		Customizable Entities, Fields, Forms	✖	
Activity Management	✔		Customizable Data Model	✔	Single user-defined entity with multiple fields
Intake, Assessment and Eligibility Forms	✔		Customizable Dashboards	✖	
Settlement, Resettlement Services	✔		Standard Reporting	✔	

Employment Services	✔		Advanced Intelligence and Analytics	⊗	
Jobs Development	✔		Data Import/Export	✔	
Language and Learning Services	✔		Email Integration	✓	Individual outbound message sending, manual logging
Community and Family Counselling Services	✔		SMS Message Integration	⊗	
Volunteer Management	✓	On roadmap	Microsoft Office / Office 365 Integration	⊗	
Survey Management	⊗		Google Workplace (GSuite) Integration	⊗	
Basic Expense Tracking	✔		Mobile Browser Access	✔	
iCARE Bulk Upload	✔		Mobile Native Apps	⊗	
Real-time Notifications / Alerts	✓	Email reminders, in-app notices	Canadian Data Hosting	✔	
Customizable Workflows and Process Automation	⊗	System workflows only	API / Web Services	✓	On roadmap
Document and File Management	✔		Implementation Service Partners	⊗	
Web Portals	⊗		ISV Product Partners	⊗	
Multi-Language (Localization)	✓	Forms in English/French, Resources English-only	3rd-Party Application Directory	⊗	

USER SUPPORT OPTIONS					
Email	✔	Application Videos	✔	Webinars	✔
Phone	✔	In-app Help / Tickets	✔	Knowledge Base	✔
Chat	⊗	Customer Portal	⊗	Community Forum	⊗

OCMS USER INTERFACE EXAMPLE



Salesforce Nonprofit Cloud by Salesforce.com

PROFILE		
Salesforce Nonprofit Cloud		by **Salesforce**
		415 Mission Street, 3rd Floor, San Francisco, CA
Nonprofit Cloud Case Management enables service providers to understand exactly where a client is in their journey through an organization's programs and guide them through next steps. Having programs, services, and clients in a single system helps service providers manage large caseloads while maintaining personalized care, ensuring no one slips through the cracks.		salesforce.org
		(647) 258-3800 (Canada)
		10,000+

PRODUCT DETAILS	
Product URL	https://www.salesforce.org/nonprofit/
Demo	30-day Trial
Solution Type	Platform
Deployment Options	Cloud
Product Lifecycle Stage	Growth
Licensing Model	Subscription - Annual/monthly per user
Canadian Deployments	Unknown

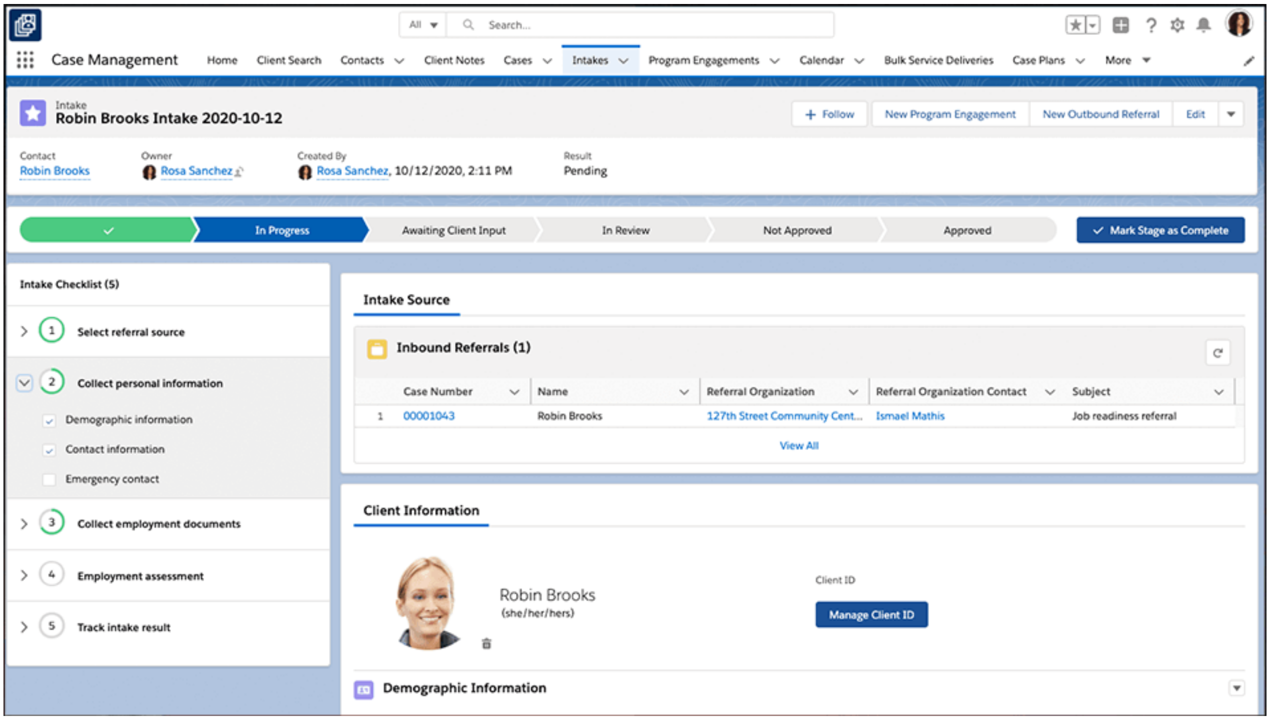
KEY FEATURES					
Client Management	✔		Role-based Permissions	✔	
Case Management	✔		Customizable Entities, Fields, Forms	✔	
Activity Management	✔		Customizable Data Model	✔	
Intake, Assessment and Eligibility Forms	✓	Requires customization	Customizable Dashboards	✔	
Settlement, Resettlement Services	✓	Requires customization	Standard Reporting	✔	
Employment Services	✓	Requires customization	Advanced Intelligence and Analytics	✓	Tableau
Jobs Development	✓	Requires customization	Data Import/Export	✔	

Language and Learning Services	✓	Requires customization	Email Integration	✔	
Community and Family Counselling Services	✓	Requires customization	SMS Message Integration	✓	3rd-Party solutions available
Volunteer Management	✓	Requires customization	Microsoft Office / Office 365 Integration	✔	
Survey Management	✓	Requires customization	Google Workplace (GSuite) Integration	✔	
Basic Expense Tracking	✓	Requires customization	Mobile Browser Access	✔	
iCARE Bulk Upload	✓	Requires customization	Mobile Native Apps	✔	
Real-time Notifications / Alerts	✓	Email, in-app notifications, SMS via 3rd-Party solutions	Canadian Data Hosting	✔	
Customizable Workflows and Process Automation	✔		API / Web Services	✔	
Document and File Management	✔		Implementation Service Partners	✔	
Web Portals	✓	Requires customization	ISV Product Partners	✔	
Multi-Language (Localization)	✓	Platform supports 21 languages; Customizations require independent localization	3rd-Party Application Directory	✔	

USER SUPPORT OPTIONS

Email	✔	Application Videos	✔	Webinars	⊗
Phone	✔	In-app Help / Tickets	✔	Knowledge Base	✔
Chat	✔	Customer Portal	✔	Community Forum	✔

Salesforce USER INTERFACE EXAMPLE



SchoolSense by Avan-Tech

PROFILE		
SchoolSense		by **Avan-Tech**
		#1030, 396 11th Ave SW, Calgary, AB
SchoolSense is an all-in-one, fully customizable product tailored towards the needs of LINC program managers. Client and instructor data is easily searchable while configured to respect privacy. Comprehensive statistics on all metrics make reporting simple and accurate.		avan-tech.ca
		(403) 705-1198
		support@avan-tech.ca
		Employees: <20

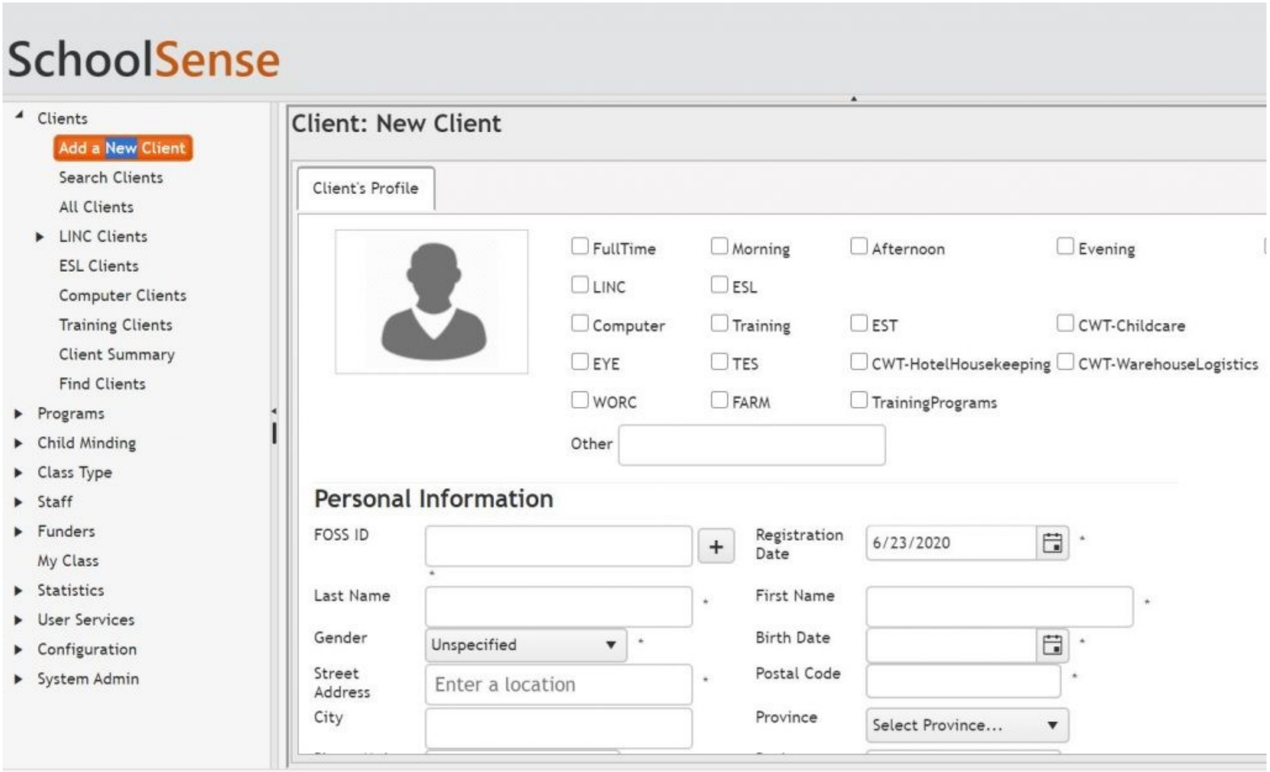
PRODUCT DETAILS	
Product URL	https://avan-tech.ca/schoolsense/
Demo	Personalized demo available
Solution Type	Commercial Application
Deployment Options	Cloud
Product Lifecycle Stage	Mature
Licensing Model	Hybrid - Initial licensing fee, Monthly hosting, plus Implementation services as-needed
Canadian Deployments	<5

KEY FEATURES					
Client Management	✔		Role-based Permissions	✔	
Case Management	⊗		Customizable Entities, Fields, Forms	⊗	
Activity Management	✓	Basic note taking	Customizable Data Model	✓	Requires Vendor customization
Intake, Assessment and Eligibility Forms	✓	LINC intake, Universal intake on roadmap	Customizable Dashboards	✓	On roadmap
Settlement, Resettlement Services	⊗		Standard Reporting	✔	
Employment Services	⊗		Advanced Intelligence and Analytics	✔	
Jobs Development	⊗		Data Import/Export	✔	

Language and Learning Services	✓		Email Integration	✗	
Community and Family Counselling Services	✗		SMS Message Integration	✗	
Volunteer Management	✓	Instructor/teachers only	Microsoft Office / Office 365 Integration	✗	
Survey Management	✗		Google Workplace (GSuite) Integration	✗	
Basic Expense Tracking	✗		Mobile Browser Access	✓	
iCARE Bulk Upload	✓		Mobile Native Apps	✗	
Real-time Notifications / Alerts	✗		Canadian Data Hosting	✓	
Customizable Workflows and Process Automation	✗		API / Web Services	✗	
Document and File Management	✗		Implementation Service Partners	✗	
Web Portals	✗		ISV Product Partners	✗	
Multi-Language (Localization)	✗		3rd-Party Application Directory	✗	

USER SUPPORT OPTIONS					
Email	✓	Application Videos	✗	Webinars	✗
Phone	✓	In-app Help / Tickets	✗	Knowledge Base	✗
Chat	✗	Customer Portal	✗	Community Forum	✗

SchoolSense USER INTERFACE EXAMPLE



ShareVision by Breakwater Designs Limited

PROFILE		
ShareVision		by **Breakwater Designs Limited**
		#430 - 425 Carrall Street, Vancouver, BC
ShareVision Management Software provides a framework for service excellence, organizational responsiveness, and operational efficiency. Created in collaboration with community service leaders, ShareVision's specialized case management architecture enables organizations working in Community Living, Child, Youth, and Family Services, Developmental Services, Employment, Education, and other community service sectors to manage people, services, and facilities under one unified management system.		sharevision.ca (866) 971-4325 info@sharevision.ca Employees: <20

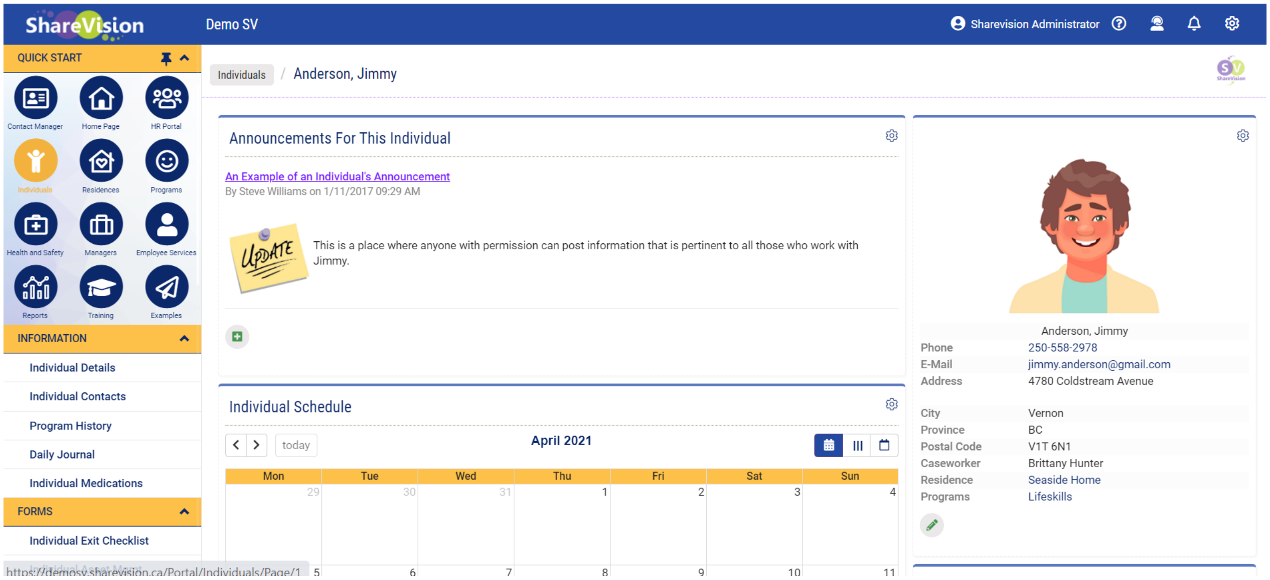
PRODUCT DETAILS	
Product URL	N/A
Demo	https://www.youtube.com/watch?v=L7Z7TzEddXs
Solution Type	Commercial Application
Deployment Options	Cloud, On-premise
Product Lifecycle Stage	Mature
Licensing Model	Custom - Based on client's requirements, No per-user licensing
Canadian Deployments	250+

KEY FEATURES					
Client Management	✔		Role-based Permissions	✔	
Case Management	✔		Customizable Entities, Fields, Forms	✔	
Activity Management	✔		Customizable Data Model	✔	
Intake, Assessment and Eligibility Forms	✔		Customizable Dashboards	✔	
Settlement, Resettlement Services	✔		Standard Reporting	✔	
Employment Services	✔		Advanced Intelligence and Analytics	✔	

Jobs Development	⊗		Data Import/Export	✔	
Language and Learning Services	✔		Email Integration	⊗	
Community and Family Counselling Services	✔		SMS Message Integration	⊗	
Volunteer Management	✓	Requires customization	Microsoft Office / Office 365 Integration	✓	SharePoint document management
Survey Management	✔		Google Workplace (GSuite) Integration	⊗	
Basic Expense Tracking	✓	Partial	Mobile Browser Access	✔	
iCARE Bulk Upload	✓	Requires customization	Mobile Native Apps	✔	
Real-time Notifications / Alerts	✓	Email reminders and follow-ups	Canadian Data Hosting	✔	
Customizable Workflows and Process Automation	✓	Email alerts may be customized	API / Web Services	✔	
Document and File Management	✔		Implementation Service Partners	✓	On roadmap
Web Portals	✔		ISV Product Partners	⊗	
Multi-Language (Localization)	✓	Browser translation, Resources English-only	3rd-Party Application Directory	⊗	

USER SUPPORT OPTIONS					
Email	✔	Application Videos	✔	Webinars	⊗
Phone	✔	In-app Help / Tickets	✔	Knowledge Base	✔
Chat	⊗	Customer Portal	⊗	Community Forum	⊗

ShareVision USER INTERFACE EXAMPLE



DOCUMENT CONTROL

Project Contributors

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Sean Gocher	Senior Consultant
Khalil Guliwala	Bilingual Business Analyst
Dr. Emer Garry	Contributing Editor

Management Distribution

Name	Organization
Katie Crocker, Chief Executive Officer	Affiliation of Multicultural Societies and Service Agencies
Sabrina Dumitra, Settlement and Integration Program Manager	Affiliation of Multicultural Societies and Service Agencies

Submission

Date	Author	Version	Change Reference
September 12, 2021	Sean Gocher	1.0	English
October 14, 2021	Sean Gocher	1.01	English – IRCC Review
December 15, 2021	Sean Gocher	1.03	French translation

< END OF DOCUMENT >