

National Council of Jewish Women

Executive Summary

Community Partner

Cristina Ruggiero

Student Consulting Team

Leah Kim

Sasha Volodin

Judy Zhang

Background

The National Council of Jewish Women (NCJW) Pittsburgh section serves the Pittsburgh, Pennsylvania community and is part of a larger national organization which has existed for 125 years. NCJW carries out their motto *“Faith in the Future; A Belief in Action”* through their various service projects and diverse programs. In particular, the Pittsburgh section has many successful ongoing initiatives such as their Center for Women, which helps women find support and achieve economic independence, and the Back2School Store, which serves underprivileged children in the community by providing school supplies and clothes free of charge.

Project Description

Project Opportunity

NCJW needs a singular, integrated customer relationship management (CRM) system that will facilitate the important community work that they engage in every day. Such a system will simplify workflow and allow them to better leverage their data for future projects. Currently, NCJW uses two CRM systems: Little Green Light for tracking constituents of the Center for Women and DonorPro for tracking all donations. In addition, the organization faces problems with duplicate data and maintenance of donation histories.

Project Vision

Our goal was to work with the NCJW to improve their data management system so that their staff members can better gather data, track volunteer and client engagement, and measure the impact of their work in the Pittsburgh community. We aim to understand how information flows within the organization, to research and implement a CRM solution, and to ensure the future maintenance of this solution. We propose that a centralized CRM system is best for NCJW since a single system allows for easy access to all the data within the organization.

Project Outcomes

The primary technology outcome of our project is our recommendation for a new CRM system to improve our client's data management. We recommended Salesforce because we found that it best addressed our client's pain points. A process outcome for our project includes reaching out to Salesforce data migration consultants to help NCJW move to the new system. In addition, in terms of people-related outcomes, we created documents that would help train staff and volunteers to avoid some of the problems NCJW is currently facing, including a Data Governance document that would help avoid errors in data entry.

Project Deliverables

We delivered several documents for the migration and maintenance of the CRM. The CRM Proposal outlines our evaluations and a recommendation to move into Salesforce. The Duplicate Data Removal Plan provides guidelines and procedures for cleaning up the data. The Technical Plan sets up suggestions for data maintenance, such as a proposed schedule for checking for duplicate data. Lastly, the Data Governance document establishes best practices for data entry moving forward.

Recommendations

The final recommendation is to migrate the current CRMs to one single CRM, Salesforce, for easy access to all the data within the organization across their many programs. We are also suggesting a data maintenance plan as outlined by the Technical Plan documentation and a procedure for removing duplicate records in the Data Duplicate Removal Plan. Once NCJW has completed the data cleaning process, we advised that they strictly follow the Data Governance document to enter records in a consistent format.

Student Consulting Team

Leah Kim served as the project manager and primary designer. She is a fourth-year student majoring in Information Systems with a double major in Human-Computer Interaction. She will continue pursuing her interests in user interface and user experience design after graduation.

Sasha Volodin was the client liaison. She is a third-year student majoring in Information Systems with a double major in Business Administration. She will be interning at Deloitte NYC this summer and is looking forward to a career in data analytics.

Judy Zhang served as the technical lead and SCRUM master. She is a third-year student majoring in Information Systems with a minor in Computer Science. She will be interning at Applied Predictive Technologies in Washington D.C. this summer and is looking forward to a career in software engineering.