

Selection and implementation of a Customer Relationship Management (CRM) program to track patron interactions

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Problem

How do you track patron interactions to:

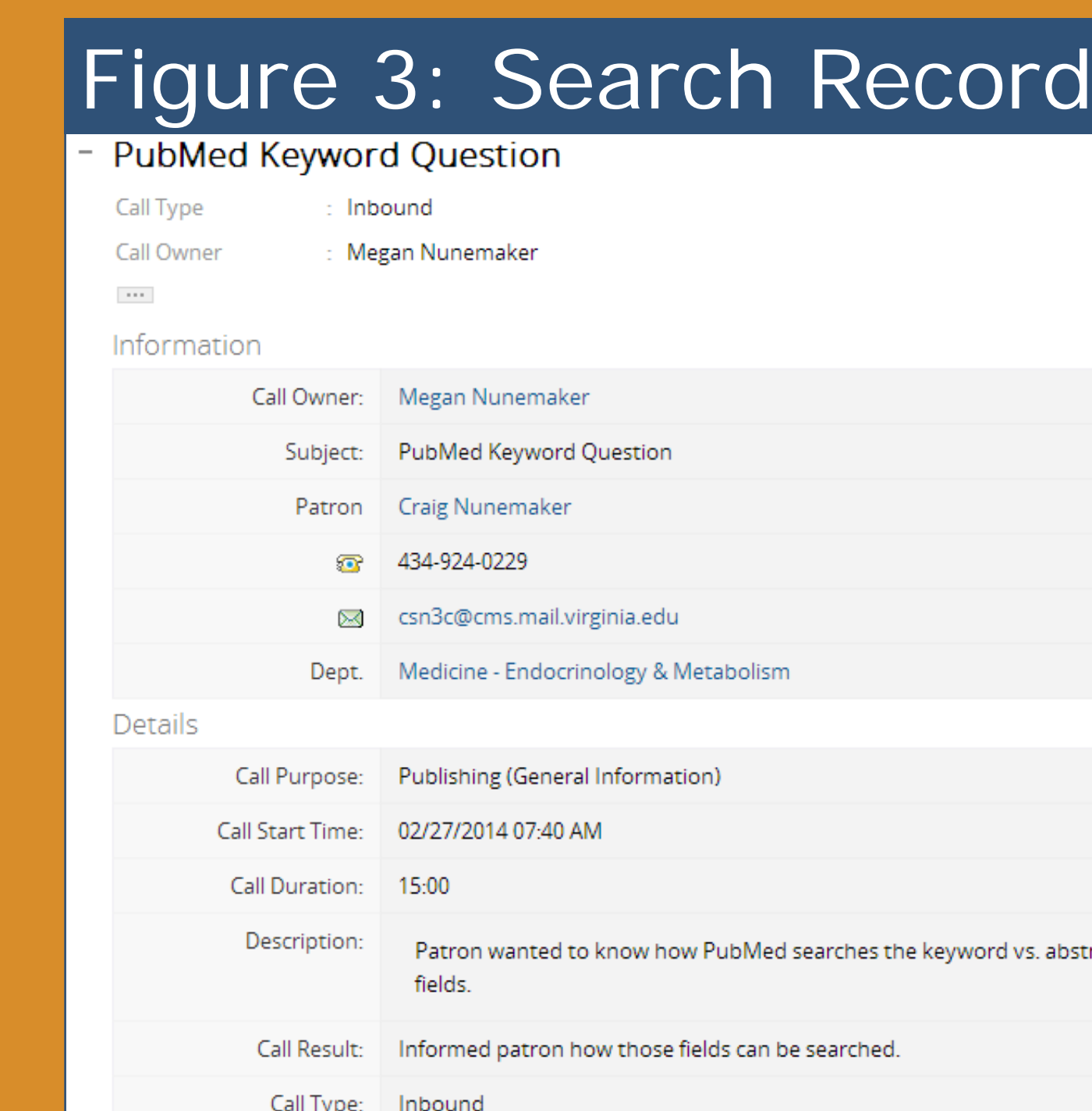
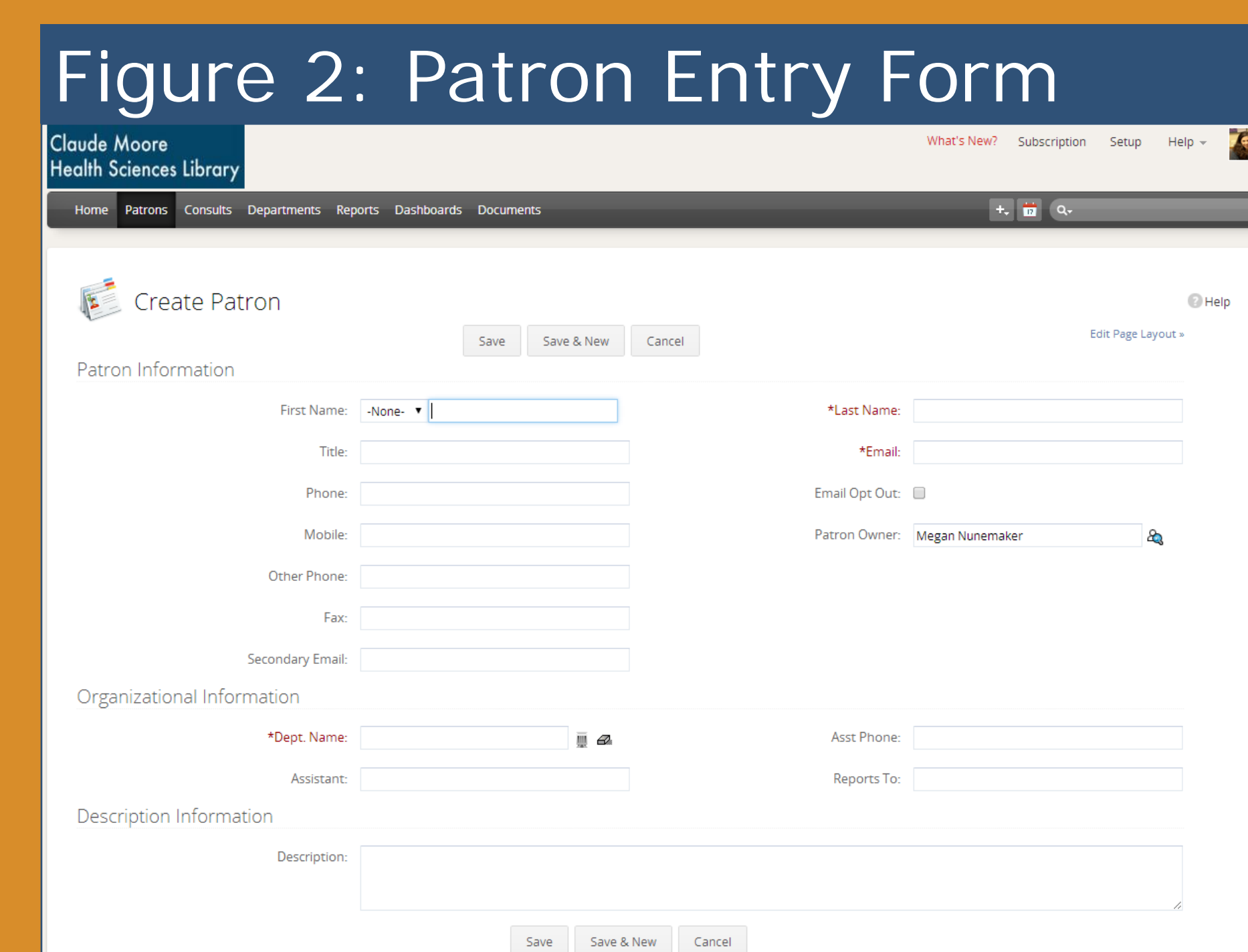
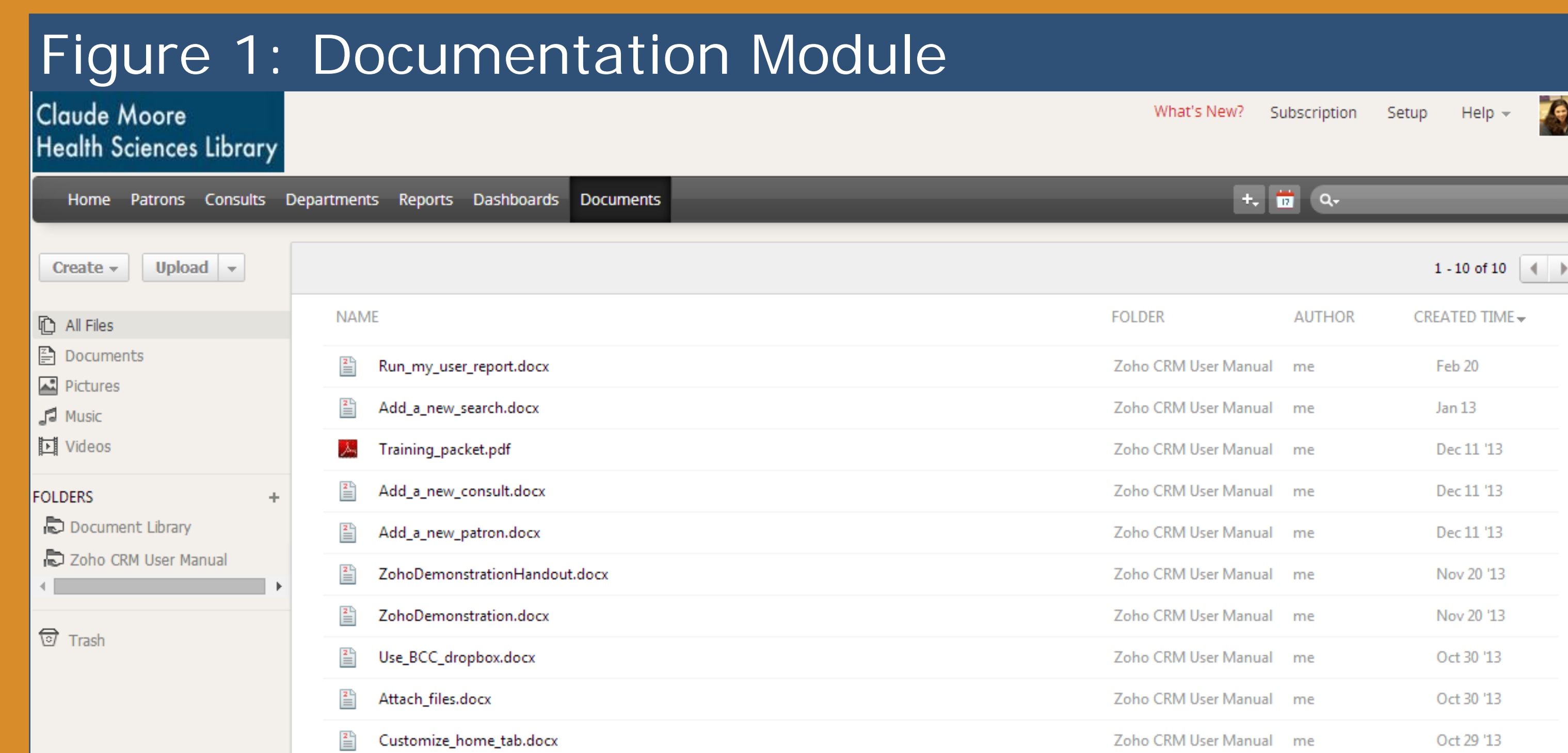
- Remember which services you provided?
- Know where you have strong connections in your organization?
- Easily provide detailed reports?
- Find the information you need when you need it?



Big Data Analytics from <https://www.slcs.se/projects/big-data-analytics>, courtesy of Daniel Gillblad

CRM Implementation

- Beta-tested in Q4 2013
- Extensive documentation created and made available within the CRM
- Staff trained in December 2013
- CRM implemented in January 2014
- Database grows by over 100 records each month



Methods

Requirements	Salesforce	HighRise	Zoho CRM	CiviCRM	SugarCRM	Kayako
Requirements document drafted						
Authors trialed several CRMs						
Consensus decision to beta-test Zoho CRM						
Product customized for Library's needs						

Our CRM selection process:

- Requirements document drafted
- Authors trialed several CRMs
- Consensus decision to beta-test **Zoho CRM**
- Product customized for Library's needs

Conclusions

- A CRM can be a useful tool for tracking patron interactions and reporting the value of library services.
- A product tailored to the needs of libraries, or non-profit service organizations, would be welcome.
- An open-source, library-developed product could be ideal.