

CRM Milestone Chart

Deliverable	January 2024	April 2024	June 2024	July/August 2024	Oct. 2024	Nov. 2024	Dec. 2024	Jan. 2025	April 2025	June 2025	July 2025
Include CRM operating costs/licenses in the 2024 IRCC CFP	X Completed										
Proposal to Board for Reserve Funding to hire Contract staff for needs assessment/identification/requirements/vendor research			X								
Hire contract staff and develop work plan				X							
Conduct needs identification/requirements/vendor research. Interview potential vendors. Shortlist solutions and vendors to the CRM Working Group					X						
CRM Working Group reviews/interviews solution and vendor. Makes recommendation to the Executive Director.						X					
Executive Director brings CRM solution/vendor development and draft implementation plan and costing to the Finance Committee for review						X					
Following Finance Committee review, proposal to the Board to secure possible one-time reserve expense for development costs and contract staffing.						X					
Present CRM plan and timelines to all staff, introduce changes to work processes and work flows						X					
Finalize development and implementation plan						X					
Finalize requirements and launch customization & development						X					
Complete customization & development. Identify champions across all departments, provide training to develop a 'train the trainer' model.									X		
Trained champions provide training to staff based on developed training plan.									X		
Soft launch/initial roll out											X

Denotes presentation/request to Finance Committee and Board