

## Why collect all that great feedback in creative and engaging ways if it can't be easily used for process improvement and reporting on outcomes?

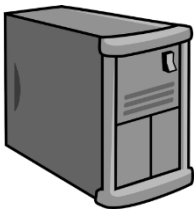
### It doesn't have to be fancy, just effective

Depending on the amount and type of information you collect, effective storage and processing can be achieved in many ways. From Excel spreadsheets to basic databases to powerful cloud based customer relationship management (CRM) platforms.

By the end of 2013 we knew that ESS had outgrown its database; we were storing and processing information in many different programmes and whilst each of these gave us the answers we needed, reporting was far more time consuming than necessary and relied heavily on the ability of a few staff to know what information was stored where.

To this end we created a database project team consisting of a member of staff from each of our 'departments': management, training delivery and administration. The team was responsible for managing the creation, implementation and maintenance of the database.

### 'Measure twice, cut once!'



You're going to be using your database regularly over the next couple of years (at least) and rely on it for easy access to information for everything from reports and bids to funders, to annual reviews and process improvement. This means it is important to take the time at the beginning to confirm not only what information you need to collect, but why and how you collect it.

ESS started by going back to our logic model, reviewing our outcomes and indicators. We then mapped how we collect all our data, from formal workshop feedback to ad hoc comments during meetings. This allowed us to clarify what, when and how we collect and record information.

We also asked ourselves who would be using the database; in our case it was staff members, however many organisations will have volunteers and external contractors who will use their database as well.

We took our requirements to tender for a system that would accommodate our needs within budget. We eventually settled on a web based CRM ([Salesforce](#)) which was tailored to our specific requirements by Ciaran from [Synovations](#). We also ensured that provision for training the staff team was included.

## 'Shake it 'till you break it'

Testing your database is vital to ensuring not only that it works, but more importantly, that it works for you. You may find steps and processes that made perfect sense at the planning stage, in practice, are clunky or don't provide the information you wanted in the first place. The earlier you get these kinks ironed out the sooner you can start using the database with confidence. This is time consuming as it requires training for, and buy in from the entire staff team but it is worth it to ensure that the system you end up with is robust, suits your needs and is ready to be officially implemented on time.



When we came to the implementation stage three members of the staff team were made 'super users' and received administrator level training. Then the project lead cascaded the training on to the staff team. Once training was complete the whole staff team started to use the database and we began to find areas that needed to be

tweaked or changed.

Possibly the most important thing we learned was to get the whole team involved at the beginning of the testing phase. We fell behind schedule because we only tested the database with safe, dummy information and it was only the database project team that tested it. This meant that we didn't find many of the redundancies, idiosyncrasies and adjustments we needed to make until the whole team started pushing the limits of the system.

## From now on

We have been using our 'new' database for almost two years now and have continued to improve the way that we use the database, especially around reporting and retrieval of information. Administrator training turned out to be very important as over the years we have changed layouts, added new workshops and removed old ones which would have incurred additional costs had we not been shown the behind the scenes basics.

To be honest there are still some pieces of information that are recorded off database as over the years we have learned that it is just easier to record elsewhere. However for the majority of our reporting, our new database has vastly improved our ability to access information and in some cases has allowed us to go far deeper with the same information.

Finally, a piece of advice to keep in mind from our [Storing information for evaluation support guide](#) which has rung true throughout the whole process: *"It is easy to be seduced by technology – the key thing is that it does what you need it to do!"*