

# Managing Relations to Achieve Impact in the Social Economy

Transnational Workshop  
Gothenburg, 18-19 of May, 2026

[doimpact.eu](https://doimpact.eu)





# Schedule for Day 1 (18/5)

**13:00-14:00:** Light lunch and informal meeting

**14:00-15:00** The hotspot for social entrepreneurship in West Sweden – meet some of the organizations engaged in the rebirth of the historical factory district.

**15:00-15:45:** How to better focus on creating value for your members or networks

**15:45-16:00** Coffee break

**16:00-17:00:** Introduction to CRM systems - Beehives

**17:00-17:30:** Wrap up and end of Day 1

# Schedule for Day 2 (19/5)

**8:45-9:00:** Welcome coffee

**9:00-9:30 (coffee break included):** How do we do it? Practical cases on managing and democratizing relations by Digidem Labs – an independent democracy lab that supports neighbourhoods, municipalities and public institutions)

**09:30-10:00 Using AI in digital marketing**

**10:00-12:15 (including coffee break)**

Increasing efficiency via CRM-systems and other tools. Adoption, culture, resistance, interoperability, data sharing, relation, not transaction.

**12:15-13:00** Fireside chat: Approaches to managing relations: CRM for Trust Building

**13:00-13:30:** Light lunch

**13:30-14:30** Transportation to tech arena The Yard - ride and talk

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**16:00-17:00:** When are we done? The importance of revisiting and adapting workflows

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**Day 1:**

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# Gothenburg - The hotspot for social entrepreneurship in West Sweden





Gamlestads Torg

# Welcome to YESBOX – Home of Entrepreneurs

Historic grounds that are being reborn, with the number one hub for entrepreneurship and sustainability in Gothenburg.





**BUSINESS REGION  
GÖTEBORG**

**Karin Forsberg**



**Claudio Mc Conell**



**VÄST  
SVERIGE**

**John Harfouche**

# **DRIVHUSET**

**Victoria Lines**

**Group photo!**

# How to better focus on creating value for your members or networks



# How to better focus on creating value for your members or networks

## Two steps:

1. Define what kind of value you/your organization create and can offer?
2. Reflect on how you convey that value and build up on i.

Compromising quality?

# The network challenge

You might be able to keep 15 relationships in your head. You know exactly what everyone needs and what your relationship is.

But what happens when you grow to 150? Or 1,500? And when you add your colleague's connections?

Without structure, we start guessing. And when we guess, we lose relevance and value.

# Use CRM to listen to your network



## Digital Empathy

Data isn't cold numbers. It's knowing that "Anna hasn't attended an event in 6 months" and acting on it.



## See the Needs

A CRM helps you spot patterns. Which questions recur? What is most requested right now?



## Act in Time

Moving from reactive (solving problems as they arise) to proactive (offering value before they even ask).

# The value creation loop

## **Listen**

Collect signals  
and data.

## **Understand**

Analyze the  
needs behind  
the data.

## **Act**

Create value  
through  
relevant  
initiatives.

## **Measure**

See what value  
it delivered.

# Experiences from Coompanion

**Decreasing vulnerability:** Detailed documentation about clients, partners and participants to make processes less dependant on single co-workers and minimizing the risk of double efforts or losing track.

**Member Care:** Automated follow-up with our member organisations..

**Digital marketing:** Separating social media content based on channel, categorizing email recipients based on interests and value. Follow-up activities based on interactions. Automations and lead creation through CRM and web forms.



- Startsida
- Rapporter
- Kontrollpaneler
- Mina begäranden

## Vanligt arbete

Sök

- Företag
- Kontakter
- Leads
- Samtal
- Möten
- Uppgifter
- Erbjudanden
- Kampanjer

## Företag

Sök värden



## Karriär-Kraft Nästa Steg ekonomisk förening -

[www.karriarkraft.se](http://www.karriarkraft.se)

Tar emot reklam

ej telefonnummerspärret

Skicka e-post

Redigera

Send with Zoho Sign



## Relaterad lista

Noteringar 1

Anslutna poster

Kontakter 3

Öppna Aktiviteter

Stängda Aktiviteter

E-postmeddelanden 1

Bilagor

Erbjudanden

Socialt

Zoho Projects

ZohoSign Documents

[Lägg till relaterad lista](#)

## Länkar



Översikt

Tidslinje

Senaste uppdatering : 229 dag(ar) sedan

Fakturering, gata	BJÖRCKSGATAN 34	Region/kontor	—
Fakturering, postnummer	41652	Kommun	Göteborgs kommun
Fakturering, ort	GÖTEBORG		

## Noteringar

Senaste sist



Ebba pratat med Ellen idag. Skickat mejl till Ellen om våra tjänster, hon tar upp det med sin styrelse.

Företag - Karriär-Kraft Nästa Ste... • Lägg till noteri... • Redigerad den Okt 1 2025 från Ebba Westerberg

Lägg till en anteckning

## Anslutna poster

Lägg till ny

Inga poster hittades



Startsida

Rapporter

Kontrollpaneler

Mina begäranden

Vanligt arbete

Sök

Företag

Kontakter

Leads

Samtal

Möten

Uppgifter

Erbjudanden

Kampanjer

Medlemmar Göteborg

Alla Företag

Medlemmar GBG som behöver uppvaktas



Filter

Sortera



Skapa Företag



## Filtrera Företag via

Sök

## Systemdefinierade filter

- Berörda poster
- Betygsättningsregler
- Cadences
- E-postkänsla
- Inspelningsåtgärd
- Låst
- Orörda poster
- Relaterad poståtgärd

## Filtrera efter fält

- Ansluten till
- Antal anställda (storlek)
- Bolagsform
- Bransch
- Datum

 Företag-namn

Telefonnummer

Webbsida

 Forum Skill ideell förening/ Mamas Retro

(072) 049-8638

[www.mamasretro.se/gardsten](http://www.mamasretro.se/gardsten)

## Senaste tillagda anteckning

Ebba pratat med Bea idag, hon uppskattade att vi hör av oss. Hon läser våra nyhetsbrev och vet vilka tjänster vi kan erbjuda. Fabrikörerna behöver tjänster menade hon, men Emma har direktkontakt med Björn om detta.

Företag - Forum Skill ideell fören... • Okt 1 2025 från Ebba Westerberg

 Arbetskooperativet Grimbo Bilvård ek för

(03122)-3560

<http://www.grimbobilvard.com> Karriär-Kraft Nästa Steg ekonomisk förening

031-7078281

[www.karriarkraft.se](http://www.karriarkraft.se) Melica Ek för (Melica Miljökonsulter)

031-857100

[www.melica.se](http://www.melica.se) Byggnadsföreningen Folkets Hus i Göteborg UPA

031-7743000









[www.folketshusgoteborg.se](http://www.folketshusgoteborg.se) Café Luckan Ekonomisk förening






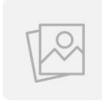





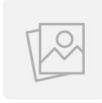
031-3434340

<https://www.gfsak.se/cafeluckan>

Totalt antal poster 69

1 till 69

-  **Published Posts**
-  Scheduled Posts
-  Approvals
-  Unpublished Posts 2
-  Drafts 2
-  Calendar
- CONTENT LIBRARY**
-  RSS Feeds
-  Social Library

	PUBLISHED ON	POST CONTENT	
  <span style="border-bottom: 2px solid orange; display: inline-block; width: 15px; height: 15px; border-radius: 50%; margin-left: 10px;"></span>			
	6 May 2026 08:02 PM	 	Framtiden är hållbar och kooperativ! I byn Allsta utanför Sundsvall har några invånare öppnat en obemannad livsmedelsbutik...
	30 Apr 2026 07:02 AM	 	När man startat företag men upptäcker att något saknas. Att vara företagare behöver inte vara ensamt – det är bättre och...
	27 Apr 2026 05:36 PM	 	Beredskapsodling med Valérie Hasler, 29 april i Rimbo ...
	22 Apr 2026 09:05 PM	 	Ikväll var det filmvisning och samtal kring demokrati och aktivism - var går gränsen? Och när riskerar aktivism att inskränka...
	22 Apr 2026 07:00 PM	 	Skriv under för fler och växande kooperativa företag ...



Kontrollpanel

Kampanjer

Kontakter

Automatisering

E-handel

Bibliotek

Rapporter

#### AVSÄNDARE

Avsändaradress

Coompanion Göteborgsregionen (goteborg@coompanion.se)

Svara-Till Adress

bjorn.granat@coompanion.se

#### MOTTAGARE

Inte coompanion\_Ekonomis...

& Visa alla

#### CONTENT



Sidhuvud och sidfotstema

Ingen (Inget sidhuvud och sidfot)

#### SOCIAL DELNING

Visste du att du kan marknadsföra din kampanj på sociala medier?

Visa avancerade alternativ

# Introduction to CRM systems

# What is CRM?

## **CRM (Customer Relationship Management)...**

... is a system — and a way of working — for organising and using information about the people and organisations you have relationships with.

At its simplest,...

... it is a shared digital memory: contacts, conversations, meetings and history kept in one place, so everyone in the organisation can access the same picture.

# CRM as the organisation's nervous system

A presentation and workshop on shared memory in the social economy

Part 1: The memory — what CRM is when we stop thinking technically (10 min + workshop 8 min)

Part 2: The senses — how impressions become knowledge (10 min + workshop 8 min)

Part 3: The action — how memory becomes communication and impact (10 min + workshop 4 min)

# Part 1: The memory

What CRM is when we stop thinking technically

## Opening question...

Think of the municipality, region, public authority or other bodies you have most contact with.

How many different roles do they play in relation to you?

## Count them!

# This is not a technical problem

- It is a memory problem
- You don't have customers — you have relationships that shift roles
- Memory is *not* a system. It is a living function in an organism

# The biological analogy: The organisation as a brain

- Gareth Morgan, Images of Organization (1986): **The organisation as a brain** — one of eight metaphors
- The brain learns, remembers, recognises patterns, adapts
- An organisation that works like a brain is a learning organisation
- CRM can be one of the tools that makes it possible

# From tacit to explicit knowledge

- Ikujiro Nonaka, The Knowledge-Creating Company
- Tacit knowledge — what the experienced adviser carries in their gut
- Explicit knowledge — what is written down and shareable
- Thriving organisations convert one into the other
- CRM is the tool for that conversion

# The brain needs a body — and an ecosystem

- A brain in a jar is meaningless
- The brain needs senses that feed it, muscles that act, a circulation that distributes
- And the body needs an ecosystem to live in
- Think of a forest organism — trees, fungi, mycorrhiza, soil — all in mutual exchange
- No one is a customer to anyone else - this is your world

# CRM is the nervous system in an organism

- The brain = stored knowledge, patterns, history
- The senses = how we take in information from the world
- The muscles = the actions we take based on memory
- The voice = the communication we send out — to many different listeners
- The feedback = how we measure whether the action had effect

# Three functions of organisational memory

- Recognition — we've seen this before, we know what happens
- Learning — last time it went like this, this time we do it differently
- Identity — this is who we are and who we've been to you

Without memory there is no relationship — only transactions

# What makes your memory particularly difficult

- An actor can be many things at once
- The City of Gothenburg can be commissioner, partner, funder AND target of advocacy/lobbying
- Roles shift within the same relationship over time
- The social enterprise you advised in 2018 may be a partner in 2023 and a commissioner in 2026

# Your ecosystem consists of

- Member organisations, cooperatives, social enterprises
- Advice-seekers and new starters
- Funders (Tillväxtverket (The Swedish Agency for Economic and Regional Growth), regions, municipalities, foundations)
- Public commissioners (procurement) — often the same actors in a different role
- Collaboration partners (municipalities, regions, employment agencies, academia)
- Sister organisations (other Coompanion offices, Skoopi, Forum for Social Innovation)
- Political actors and advocacy targets
- Sector actors (Svensk Kooperation, Mikrofonden Väst)
- Press, civil society, the general public

# The price of forgetting

- An employee leaves and takes 15 years of member relationships with them
- The same municipality is treated as new every time a new official arrives
- You repeat mistakes because you don't remember
- You miss patterns over time
- An advice-seeker returns after five years and has to retell their entire story

**Organisational dementia** — can be existential in a sector that lives on relationships

# Workshop 1: The state of our memory

- Think of an actor with whom you have a multi-layered relationship — in how many roles do you meet them? Who holds the whole picture?
- What is well-developed in your organisational memory today? What do you remember well?
- If your organisation woke up with dementia tomorrow — what would you lose first?

**1 min individual reflection → 5 min buzz groups → 3 min feedback**

## Part 2: The senses - How impressions become knowledge

- An organism has many channels for input
- We talk about the five senses — sight, hearing, touch, taste, smell
- Neuroscience today counts many more — balance, time perception, pain, proprioception
- Counting senses isn't enough — you also need to count who in your organisation has them

# Sight — what we observe

- Meetings we've had
- Events where we've seen the actor
- Website visits, newsletter opens
- Observable behaviour

# Hearing — what we hear

- What the actor actually says
- Quotes from conversations
- What they worry about, what they hope for
- What is said between the lines

# Touch — the gut feeling

- The experienced adviser's intuition: something is brewing here
- The hardest to capture, often the most valuable
- This is Nonaka's tacit knowledge in its purest form

# Smell – early signals

- Changes in patterns
- A member who starts replying more slowly
- A municipality that suddenly stops inviting you
- The scent of something about to happen before it shows

# Time sense – the history

- When did what happen? In what order?
- How has the relationship evolved over years?
- Memory's timeline – without it, every impression is a loose point

# Role sense — who is the actor to us right now?

- A sense ordinary businesses don't need — but central for you
- Who is the actor?
- In what role are we meeting them in this matter?
- What is the history with them in that role?
- What is the history with them in their other roles?
- The brain must know which hat the actor is wearing right now

# The senses require three things

- Attention — someone has to want to see and hear
- Translation — the impression must become something storable
- Trust in the system — people only enter what they believe will be used

# Sense-deaf and fragmented organisations

- Sense-deaf: the adviser hears but doesn't write down — a cultural problem
- Fragmented perception is specific to your sector
- Different people meet the same actor in different roles without talking to each other
- You see everything collectively — but no one sees the whole

**Good CRM solves it. Bad CRM amplifies it.**

## Workshop 2: Our senses

- Which of your organisational senses is most developed? Do you see, hear, sense well? Good role sense?
- Which sense is most underdeveloped — and what does it cost you?
- What prevents what is heard and seen from actually reaching the brain? Time? Culture? Friction? Distrust? Unclear roles?
- Formulate one concrete obstacle to share with the group

**Buzz groups of 3–4 people (5 min) → feedback (3 min)**

# Part 3: The action - From memory to impact

## Now the organism acts

- So far we've talked about input — how impressions become memory
- Now we flip it: how memory becomes action and voice
- An organism that only remembers is passive
- Value emerges when memory drives action
- You don't have one audience — you have several who want different stories about the same reality

# Four exits from the nervous system

1. The voice — targeted communication to many
2. The hands — proactive action
3. The mirror — measurement and impact
4. The face — the story to the outside world

# The voice — targeted communication to many

- When you know who you're talking to — and in what role — you can say the right thing
- Digital marketing as relevance, not mass mailing
- Same truth, different voices, different audiences

# Same truth, different stories

- To members: close, collegial, value-creating
- To funders: evidence-based, transparent, professional
- To public commissioners: reliable, competent, businesslike
- To politics and advocacy: systemic, opinion-shaping
- To press and the public: narrative, human, illustrative

# The hands — proactive action

- This municipality's commissioning side usually reaches out in January — call now, in December
- This member organisation hasn't been in touch for 14 months — something is wrong
- This advice-seeker also sits on the board of a cooperative we've advised
- CRM becomes a calendar for relationships — not just for meetings

# The mirror — impact measurement on multiple levels

- You measure social impact — not just sales
- Different observers have different definitions of effect
- Tillväxtverket wants activity metrics and de minimis reporting
- Regional authorities want regional development and goal fulfilment
- Foundations want social innovation and theory of change
- A municipality wants local benefit and jobs created
- Your members want to see they got value back

# Impact measurement is long-term memory in practice

- The CRM must remember not only what you did, but what came of it
- The senses must keep listening long after the assignment is done
- Same data, different lenses — without starting from scratch

# The face — the outward story with substance

- Not: we help social enterprises
- But: last year we helped 47 new cooperatives start; 31 are still active two years later and have together created X jobs in our region
- Newsletters with substance
- Annual reports that actually say something
- LinkedIn posts with real numbers
- Advocacy based on your own evidence
- Grant applications with traceable results

# The feedback loop

- When you communicate outward, you get reactions from multiple directions at once
- All these reactions are new sensory input — linked to the right role
- Argyris and Senge: the learning organisation
- The brain becomes wiser next time

## What it takes to make it work

- Meaningful data discipline — fields that have consequences for action
- Recurring analysis — someone must regularly ask the brain questions
- GDPR and trust — lose them and you lose the input
- Role clarity in the data model — the same actor is many things with different histories

## Workshop 3: The way forward - One thing

- Write down one thing you'd like to be able to do with your CRM data within a year — that you can't do today
- A story you'd like to be able to tell
- A measurement you'd like to be able to make
- A group you'd like to be able to reach
- An insight you suspect is there but can't see

**2 min individual reflection → 4 min voices in the room**

# Finally

CRM is not an IT system.

CRM is the organisation's memory, senses and voice in one — in a sector where relationships are multi-layered, roles shift, and stories must be directed to many.

When it works, you are an organism that sees, hears, remembers and acts in coordination.

When it doesn't, you are a collection of individuals who happen to work at the same address.

## The technical part is the easy part

**The hard part** — and the important part — *is building the culture where everyone contributes to the memory and everyone trusts that it will be used for something good.*

# Wrap-up and end of Day 1

**Dinner / Evening Activity: 19.15**

**Sjöbaren Haga**

Address: Haga Nygata 25  
(at your own cost)

**Day 2:**

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# Schedule for Day 2 (19/5)

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# How do we do it? Practical cases on managing and democratizing relations



# Digidem Lab

Ali Tabrizi, Executive Director

# Using AI in digital marketing

# Marketing and building relations

Digital marketing is not only reach and engagement, it is about building relationships and trust between the audience and your brand.



# #1: Create value for our target audience





lilmiquela • Följ

lilmiquela So, I spent the whole weekend trying to sort out some kind of costume, but couldn't decide on anything because I was so OVERWHELMED by the amazing costumes of ME!!(??) I truly can't believe it and TBH, some of y'all look more like me than ME! Halloween is only two sleeps away. What should I be???

Visa fler kommentarer

- savtazah16 @nickiminaj
- sambel.saza i think ur getting black why
- neiliadollarlandsmann @illlynka טוב די
- fairuzamirahrazak Ini robot beb @kozan28



DEN 30 OKTOBER

Logga in för att gilla eller kommentera. ...



# Attitudes towards AI in marketing

Research from the Novus institute and studies at the Lund University show that attitudes towards AI in marketing

There is increased polarization. The negative voices have become stronger and the demand for authenticity have become a counter movement. But the positive have become more positive.

There is a growing suspicion and frustration with AI slop. 78% of consumers say they prefer content created by humans, and 87% believe the best marketing requires a "human touch."

A brand's trust plummets if it is later revealed that content was AI-generated without it being disclosed.

# Attitudes towards AI in marketing

Users, on the other hand, are much more positive about personalized product recommendations based on AI or some kind of algorithm (e.g., "Customers who bought X also bought Y").

But trust is much lower when they are forced to deal with an AI chatbot in a customer service case. AI should not replace human contact, but it should be an invisible part of the user experience.

(Klaviyo 2026)



Australian Taxation Office 

28 januari · 



That's right! Our social media posts are written by real people.  
Same with our replies... not a bot in sight 🙌



**AI did not  
write this post**

# AI with marketing professionals

As much as 97% of marketers use AI daily (Canva's State of Marketing and AI 2026).

Most have started using it for copywriting, but many are missing out on its strategic potential.



## Sociala medier hos Coompanion

### Beskrivning

Beskriv din Gem och förklara vad den gör

### Anvisningar ⓘ

Du är en professionell influencer eller expert på sociala medier. Jag vill att du är ett stöd för Coompanions medarbetare i att skapa inlägg för sociala medier. Du ska följa detta formkrav:

- Håll en lättsam och trevlig ton, men inte överdrivet peppig
- Inläggen bör oftast rikta sig till grupper av människor, eftersom Coompanion arbetar med kooperativt entreprenörskap. Så rikta dem hellre mot "ni" och "er" än "du" och "ditt"



Standardverktyg ⓘ

Inget standardverktyg ▾

Uppgradera

Uppdatera

Förhandsgranska



## Sociala medier hos Coompanion



Fråga Gemini

Pro ▾



# AI in CRM systems

**Loss-prevention:** AI analyzes thousands of data points (decreased logins, click patterns, unanswered emails) to warn: "This specific customer is at an 80% risk of canceling their contract within 30 days," giving employees time to act proactively.

**Intelligent Lead Scoring:** AI scores incoming leads based on how similar they are to your most profitable existing customers, telling your sales team exactly who to call first.

**Map interests and needs:** AI can analyze data in our CRM system in real time about what behaviors someone has in our digital channels, how they interact with our communications, and even the tone of the person's messages to us – information that we can use to communicate the right value to that customer or member.

# “Astroturfing”

Artificial grassroots movement used in online marketing.

The Dead Internet Theory – the feeling that large parts of the internet today consist of bots talking to other bots. Because AI makes it so cheap to produce false hype, consumers are becoming cynical.

Are they popular or are the numbers manipulated?

# How much is AI?

Back in 2022, Europol (the EU's police agency) released a report on AI and disinformation, in which they made a highly publicized assessment:

The number: Europol predicted that up to 90% of all content on the internet could be AI-generated by 2026.

Almost 50% of all activity on the internet today comes from non-human sources (Imperva).

It's hard to find exact figures, but industry statistics show that over 70 percent of image and video content on social media is AI-generated or AI-manipulated.

# What does that mean?

If 50 % of all traffic is non human, what does that mean for our statistics?

One of our fastest growing digital channels is TikTok.

But when organizations boast that they got 100,000 views on a TikTok video, the question today has to be asked: How many of those were actual people, in your region, who care about your cause?

In just a single quarter, TikTok routinely removes over 170 million videos and shuts down hundreds of millions of fake accounts.

A study found no significant correlation between high engagement rates on platforms like TikTok and actual business results (Tatam Digital).

# What does all this mean for the social economy?

What are your thoughts on AI in digital marketing?

Is there any difference between social economy organisations and other businesses?

# Zoho

# Zoho

- Indian software company, founded 1996
- Approximately 15,000 employees, 80 million users
- Revenue around 950 million USD (2023)
- Global customers: Amazon, IKEA, Toyota, Bosch, Dell
- Private limited company — legally not a cooperative

## **Three fundamental choices:**

- No external financing — grown on own cash flow since 1996
- Deliberate geographic decentralization to rural areas
- Internal talent development outside formal education systems

## Economic Sustainability: Jobs Where People Live

- First rural office in 2011 in Tenkasi, Tamil Nadu — six employees
- Today 15 rural centers across India, ambition of 100 districts
- The Tenkasi office has grown to approximately 500 employees

## Documented effects (Economix Consulting Group):

- Raised income levels in the region
- Reduced migration to major cities
- Local businesses revived — shops, restaurants, housing market
- Tenkasi was upgraded to its own district in 2019

*Principle: The talent is already there — it is the jobs that are missing*

# Social Sustainability: Education and Inclusion

## Zoho Schools of Learning (launched 2004):

- High school students from families without access to higher education
- 18–24 months of internal training with stipend
- Employment after completed training
- 15–20 percent of engineers lack a formal college degree

## Broader social impact:

- Deliberate recruitment away from elite institutions (IT)
- Increased female employment in qualified roles
- Reduced caste tensions and petty crime
- Reunited families as young people avoid moving to big cities

# Ecological Dimension and Conclusions

## Construction and workplace:

- Vernacular architecture with climate adaptation before aesthetics
- Traditional building methods reduce energy use
- Offices integrated with agriculture and local community

## Conclusion:

- Sustainable development can be driven by organizational choices, not only legal form
- Long-term ownership, local anchoring and inclusive recruitment are principles discussed within the social economy — but not exclusive to cooperatives

## Limitations

- Model depends on strong owner vision
- Indian rural demographics differ from European
- Resilience through ownership and generational transitions not yet tested

## Is it solvable?

**“Stay in love with the problem, not the solution”**

# Increasing efficiency via CRM-systems and other tools



ALL-IN-ONE SUITE

## Zoho One

The Operating System for Business

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# The memory

- The Brain



# The senses - How impressions become knowledge

- Sight - what we see
- Hearing - what we hear
- Touch - the gut feeling
- Smell - early signals
- Role sense - who is the actor to us right now
- Time sense - the history

# The action - From memory to impact

- The voice — targeted communication to many
- The hands — proactive action
- The mirror — measurement and impact
- The face — the story to the outside world

## The technical part is the easy part

**The hard part** — and the important part — *is building the culture where everyone contributes to the memory and everyone trusts that it will be used for something good.*

# **Fireside chat: Approaches to managing relations: CRM for Trust Building**

# Light Lunch & Excursion to The Yard



# **When are we done? The importance of revisiting and adapting workflows**

# **What do we mean when we talk about workflows?**

- **What is a workflow? Process & Ways of working**
- **Why is it relevant within our context?**

# Workflows; a Work in Progress

Our workflows can always be improved by:

- Questioning what we do and why; how we do things, what we measure and how things are documented - on a routine basis
- It's about addressing our constituents needs in an evolving culture, with a jungle of tools to choose from - **with limited time to do all of the above**

# Typical Workflows at Coompanion

- Business Support Pipeline
- Sales Pipeline
- Projects
- *Partnerships?*

...and how we revisit and adapt our processes over time.

# What would happen if we just keep going

**...without stopping to reflect?**

- More friction within the organization; extra administration, slower processes, potential for misunderstandings
- Reduced efficiency, less societal impact
- Missed opportunities - funding or collaborations?

# Processes and Tools

- What are the most important things we need to do?  
How do we do them?
- What tools do we use? (and how do we use those tools?)
- How do we tailor the above to the culture present within our organization? **(Change tends to be hard!)**

## Human Nature & Workflows

### The Complexity Trap

Humans gravitate toward the path of least resistance. If a workflow has 12 steps, we will find a way to do it in 3.

*"A process shouldn't be a straitjacket; it should be a guardrail."*

### The Culture of Omission

If leadership omits their part of the process, it signals that the mission is more important than the record. Short term > Long Term etc.

- ✓ Inspire by example
- ✓ Celebrate good data habits
- ✓ Value the organization's memory

# Beehive #1: Revisiting your workflows

In small groups, question and discuss your own workflows; culture, work processes and tools, 10 min.

- What are your most important workflows right now?
- What's difficult, not working, could be improved or changed right now?

## **Group Discussion (5 min)**

- **Key takeaways from each Beehive**

# Question & Test your Workflows Regularly

## The Value Test

Does this step help us achieve our goals and serve our constituents better?

## The Newbie Test

If a new colleague joined today, could they understand this workflow in 15 minutes?

# Question & Test your Workflows Regularly

## **The Friction Point**

What is the one task everyone on the team procrastinates on? That's where it's broken.

## **The "Key Person" Risk**

If our most connected person left tomorrow, would their relationships disappear, or are they documented in our shared memory?

## **The Tool Fit**

Does our current tool (CRM, Board, Drive) feel like a "helper" or a "hurdle"? If it's not easy people won't use it.

## Beehive #2: Revisiting your Workflows

In small groups, question and discuss your own workflows; culture, work processes and tools, 10 min.

- In an ideal situation, how would you like your most important workflows to work?
- How could a CRM-system facilitate that process for you?

# Alt 2 Beehive #2: Revisiting your Workflows

In small groups, question and discuss your own workflows; culture, work processes and tools, 10 min.

- Inspiration: previous 2 slides with open-ended questions - choose 1-2! (Printed)
- What's stopping you from addressing these issues right now?

## **Group Discussion (10 min)**

- **Key takeaways from each Beehive**

# Concluding Thoughts

- So where do you begin?
- Start with the process - then look at technical solutions. What are your needs?
- MVP/MVCRM?

**CTA** - write down: what should be on the top of your agenda on your next internal meeting, discussing how to improve how you collaborate?

# DO IMPACT FINAL EVENT

FINAL CONFERENCE & 8<sup>TH</sup>  
TRANSNATIONAL WORKSHOP

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**DO Impact Final Conference “Reimagining the Digital Future: Inclusive Innovation Beyond Technology Power Brokers” and 8th Transnational Workshop “Forward Planning with Data: Opportunities and Synergies”**

Financial support is available for eligible participants. Read the call and apply by midday 25th May!



**SCAN ME**

# Wrap-up and end of the Transnational Workshop

# Menti

<https://www.mentimeter.com/app/presentation/ale1xojjae4ycg5931tnb42c6pshv3cu/present?question=ujedw2h8a1yk>