Without Walls

Brief for IT Change Consultancy

September 2022

**1: Introduction**

Without Walls is looking for a suitably qualified person or company to support the identification and implementation of a CRM system (or similar).

The identified system must bring together Without Walls’ database, data management process, and core workflows into a single platform.

**2: Background**

Founded in 2007, Without Walls is a consortium of over 30 partners working together to create, develop and tour innovative new work and invest in the growth of the outdoor arts sector. It is a National Portfolio Organisation of Arts Council England and has an annual turnover of £1.2m.

The Without Walls consortium has no direct staff of its own and is managed by XTRAX, an outdoor arts management company based in Hulme in South Manchester. XTRAX has 13 employees and is supported by a number of freelancers.

**3: Processes and Data Sets**

Without Walls holds and uses data for a range of stakeholders and customers, including 30+ regular partner festivals, 40+ commissioned/supported artists each year, funders, web-users, subscribers to its newsletters, and suppliers.

This data sits in a range of platforms, including MailerLite (a bulk email system), a legacy database, WordPress CMS and plug-ins, Google Forms, Sage, and in multiple standalone Excel spreadsheets.

Without Walls is in the process of adopting Asana within the organisation, an internal work management tool, and the CRM should be able to integrate with this.

An indicative list of core business processes and existing data sets is shown below (this list is not exhaustive and is provided as a guide for people or companies interested in responding to this brief).

* Commissioning an annual programme of new shows. This entails an open call for artists and companies who wish to apply (done through a plug-in, Gravity Forms, on the Without Walls website, which is downloaded into CSV files). Approximately 150+ responses are received per open call.
* Grant payments to festival partners and artists, following a fixed schedule and trigger points.
* Annual evaluations with our festival partners and artists. These evaluations are completed using Google Forms.
* Professional training events, which require artists and companies to apply or register.
* Regular newsletters to our subscribers (currently 5k+), with data held within the mailing software (MailerLite).

**4: Consultancy Support**

Without Walls is looking for a person or company to support the identification and implementation of a CRM system to replace or integrate these different platforms, so that data is kept in a single, dynamic place, enabling greater efficiency and improved reporting.

The consultancy will consist of two phases.

*Phase one:*

* Mapping of current data sets and storage, identifying those that need to be migrated into the replacement system.
* Mapping key business processes that use stakeholder and customer data, identifying those that can be managed through the replacement system.
* Identification of three suitable replacement CRM systems, including costs and licensing.

*Phase two:*

* Managing the implementation process for the system which is selected, ensuring the software supplier delivers on time.
* Reporting to the XTRAX management team.
* Ensuring sufficient training materials are available for end users.

Without Walls is keen for the same person or company to undertake both phases of work.

**5: Expected Deliverables**

*Phase one*:

* A summary report detailing data sets and processes to be migrated to a new system.
* Details of three potential software suppliers, including costs, and a top recommendation.

*Phase two:*

* Weekly updates to the XTRAX management team implementation progress.
* Software implementation signed-off by an agreed date, including training materials for users.

**6: Fees and Days**

The maximum fee for both phases of the work is £3,000 and this is expected to involve 15-20 days of work.

**7: Next Steps**

If you are interested in applying for this piece of work, please submit a short expression of interest (no more than two sides of A4) outlining your relevant experience and approach to the project.

Completed expression of interest should be emailed to: ralph@xtrax.org.uk

Closing date: **5pm** on **Friday 30 September.**