



CRM Implementation Case Study 2026

The Older Men's Network (TOMNET) – Toowoomba and the Lockyer Valley

CHALLENGES

1. Selecting the Right CRM

- Lengthy evaluation process due to large number of CRM platforms available.
- Many systems were sales-focused rather than designed for community service delivery.
- Essential features were either unavailable or required expensive upgrades.
- Budget constraints limited options.

2. Cost Pressures

- Total cost influenced by:
 - Number of users
 - Training requirements
 - Customisation
 - Reporting add-ons
- Balancing affordability with long-term sustainability was difficult.

3. Technical & Customisation Demands

- Significant programming and configuration skills were required.
- Staff had varying levels of digital literacy.
- Customisation was more complex than anticipated.

4. Data Migration Complexity

- Migration was time-intensive and technically challenging.
- Required redesigning how outcomes and impact were captured.
- It was not just data transfer, but it required structural improvement of data systems.

5. Reporting Limitations

- Pre-configured reports did not meet organisational needs.
- Paying for full vendor customisation was cost prohibitive.
- Required purchasing an additional module and building internal reporting logic.

6. Unique Attendance Tracking Gap

- The CRM could not calculate unique attendances as required for reporting.
- Manual tracking was inefficient and frustrating.
- Required development of a custom-built attendance app.

7. Implementation Time & Capacity

- Took over 12 months to implement.
- Small team balancing core service delivery with system rollout.
- Resource strain during transition period.



LEARNINGS

1. Community Services Require Sector-Specific Solutions

- Many CRMs are not built for community reporting and compliance needs.
- Sector alignment is more important than brand popularity.

2. Customisation Is Essential

- Off-the-shelf functionality rarely meets community program requirements.
- Flexibility and ability to customise fields and reporting are critical.

3. Internal Technical Capability Is a Major Asset

- Having in-house technical skills significantly reduces long-term costs.
- Ability to build add-ons (e.g., attendance app) increases system effectiveness.
- Not all organisations have this advantage, creating inequity across the sector.

4. Data Migration is an Opportunity for Improvement

- Migration should be treated as a redesign process, not a simple transfer.
- Strengthening outcome measurement during migration adds long-term value.

5. Implementation Takes Longer Than Expected

- Small organisations should plan for extended timelines.
- Implementation requires ongoing refinement even after “go-live.”

6. Modular, Integrated Approaches Can Work

- Combining CRM functionality with complementary tools (e.g., custom apps) can achieve better outcomes than relying on a single system alone.

7. Emerging Technologies May Lower Barriers

- AI and low-code tools may make custom solutions more accessible in future.
- Smaller organisations may eventually build lightweight solutions without deep programming expertise.



SUCCESSSES

1. Established a Single Source of Truth

- Centralised participant and program records.
- Reduced duplication and reliance on spreadsheets.
- Improved data integrity.

2. Strengthened Governance & Compliance

- Better audit readiness.
- Alignment with funding body reporting requirements.
- Integration of policy and asset registers.

3. Improved Reporting Accuracy

- Real-time demographic tracking.
- Accurate referral and inquiry monitoring.
- Regional comparison capability.
- Identification of previously under-reported numbers.

4. Evidence-Informed Decision-Making

- Management committee now receives reliable, data-driven insights.
- Supports strategic planning and organisational growth.

5. Enhanced Event & Program Management

- Strong event management functionality.
- Tailored reporting built internally.
- Unique attendance app significantly reduces manual reconciliation.

6. Built Organisational Capacity for Growth

- Scalable system designed to grow with the organisation.
- Foundation for future expansion.
- Increased operational maturity.

OVERALL ANALYSIS

While the implementation of **ChilliBD** was technically demanding, time-intensive, and resource-heavy, it ultimately delivered:

- Greater organisational control
- Stronger compliance and governance
- More accurate and credible reporting
- Strategic insight for growth

The project demonstrated that for small community organisations, CRM implementation is not simply a technology upgrade, it is an organisational transformation process.

Presented by: Shannon Wade and Anthony Hegarty (TOMNET) at the SSIP-COP 1 on Wednesday 18/2/26.