



CRM Advisory Consultant SOW

Location: Remote, Home-based

Time Period: Estimate of 20-30 hours over 4-6 weeks

BACKGROUND

Seva Foundation (“Seva”) is a global nonprofit eye care organization that transforms lives and strengthens communities by restoring sight and preventing blindness. We train local eye care providers and develop self-sustaining eye programs around the world. Together we provide critical eye care to underserved communities, especially women, children, and indigenous peoples. Seva has helped 5 million blind people regain their sight in more than 20 countries.

CONSULTANCY DESCRIPTION

Seva’s Programs Department is seeking a customer relationship management (CRM) solution to manage our work and partnerships with 100+ hospitals globally. Seva’s Programs Department, which includes 10 global employees, is responsible for the implementation of all program efforts, including the quality of programming, identification of new initiatives, day-to-day management of program activities, building and maintaining partnerships, and evidencing our work. Day-to-day management includes but is not limited to: grants management (contracts and payments), tracking partner deliverables and reporting, and communications with partners and contractors. The Department is currently tracking this information manually across several siloed spreadsheets. We are looking for a cost effective CRM solution that will house this information in one central location accessible to all team members.

Seva seeks a person with expertise of CRM solutions, strong familiarity of the CRM market, and experience in identifying CRM solutions for non-profit organizations. There are three main components to the project:

1. Assess and document the CRM use case for Seva’s Programs Department
2. Research and summarize CRM software applicable to Seva’s use case
3. Provide recommendations on CRM solutions for Seva’s Programs Department

This consultancy will be paid by deliverable. The successful candidate should be comfortable working independently and be able to represent the organization.

SCOPE OF WORK

Objective 1: Document the CRM use case for Seva’s Programs department

Facilitate discussions with Seva’s Programs team members to understand Seva’s CRM use cases, current operational workflow, and user journeys. Identify major hurdles and inefficiencies in Seva’s current operational workflow and partner relationship management.

Deliverable: Prepare a slide deck that includes: an outline of the consultant's understanding of Seva's CRM use cases and a visualization of Seva's current operational and partner management workflow with identified bottlenecks, inefficiencies, and redundancies.

Objective 2: Research and outline 3-5 CRM solutions applicable to Seva's use cases.

Based on the learnings from Objective 1 and the consultant's expertise and research, compile and present 3-5 CRM solutions applicable to Seva's use cases and needs.

Deliverable: Build on the Objective 1 deliverable by summarizing CRM solutions applicable to Seva's use case, including the pros/cons of each solution.

Objective 3: Based on learnings and research from Objectives 1 and 2, advise Seva's Programs Department on a CRM solution applicable to our needs and parameters.

Deliverable: Outline the top 3 CRM solutions that Seva's Programs department can implement to improve the workflow and management of program activities and relationships. Should include: human resources/skills, timeline, financial investment required to execute each solution.

QUALIFICATIONS

- Advanced knowledge of customer relation management software
- Experience supporting non-profit organizations in identifying and implementing CRM solutions
- Highly organized and able to communicate their ideas effectively
- Able to represent the organization professionally
- Able to be available for web conferencing or phone calls during Pacific Standard Time work hours

APPLICATION PROCESS

Please submit your cover letter, proposed approach, budget, and resume to jobs@seva.org with the Subject: "CRM Advisory Consultant."