Building SaaS Offerings with CiviCRM

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Software as a Service

- Eliminates concern with installing, managing, maintaining and upgrading
- Service ‘just works’
- Office365 in cloud versus desktop software

Bulk hosting of CiviCRM is a type of SaaS

- Standardized install with standard set of extensions/modules/plugins
- Some offerings lock down options, and ‘just work’: CiviSpark

CiviCRM is like a general Swiss army knife tool, like Office365

SaaS’s tend to be more focused on particular use
CanadaHelps

- Over 25% of online donations in Canada
- Numerous services for donations, events, memberships
- Donors can give to any charity in Canada and get tax receipt
- Small to medium charities get most of donation and none of the hassle

Wanted

- To respond to requests from charities to manage donations better
- To not cannibalize existing services
- To create revenue stream that was not based on % of donation

Chose open source to reduce development cost

Chose CiviCRM over Sugar as more oriented to non-profit uses
DMS Development

- JMA assisted developing internal development and hosting capacity
- Aimed to simplify user experience, functionality
- Unique value proposition is nightly import of donations from their portal services
- Worked with beta clients to establish Product Market fit
- Developed reports aiming to better match charity needs, and improve simplicity
- Supports backend donations, CiviMail, tax receipts
Sample Redesigned UX
Hosting

Mathieu at Symbiotic is key subcontractor

Aegir managed Drupal 7 / CiviCRM

Separate Aegir platforms for Test/dev, UAT, prod

Initially VPS had both webhost and database server

JMA created beta version of ‘Skynet’ React app on decoupled Drupal backend that further automated provisioning:

• Create subdomain, create subaccount for bulk email, create inbox, various initial configurations in CiviCRM
OBIAAA

- Ontario Business Improvement Area Association
  - Legislation creates BIAs that are responsible for furthering interest of business in a commercial area
  - Most ‘high streets’ are a BIA
- Pandemic hit street front shops and restaurants and small businesses serving the public very hard
- OBIAA wanted better information on the health of BIAs to assist in policy formation and lobbying
- BIAs have similar needs for managing their membership-based association
MainStreetRM

- Supports Property, Unit(s) in Property, Business(es) in Unit, Owner(s) of Property
- Local BIA can manage membership in association, including voting at AGM
  - Only 1 owner of a property can vote
- Reports provide information on health and changes in the health of the BIA
- Support for cases with Municipality, Local Dollars, etc.
- Provides Listings of Businesses for public facing BIA website
**Data Aggregation**

- Allows Properties to be loaded from standard Municipal Property Assessment Corporation data provided to municipalities.
- Standardized categories for businesses as well as local ones.
- Data is synchronized nightly from local BIAs to central site:
  - No personally identifiable information is synchronized.
- Province-wide lobbying data is the aim.
MainStreetRM Technical Infrastructure

• WordPress / CiviCRM
• Aegir hosting
• Percona cluster with TDE
• HashiCorp Cluster for key management of TDE
• Tight specification
• On time and within budget
• Hosting 24/7 to 99.5% availability
Community Organizing CRM SaaS

- Capacity building organization is partnering with JMA in development
- Architecture is D10/CiviCRM based SaaS separate from website of community organization
  - Diversity of CMSes: WordPress with various page-builders, Drupal, Wix, SquareSpace, etc.
  - Aiming to make organizing CRM more plug-and-play
- CiviCRM content needs to be exposed through any CMS or app
  - Working to add oEmbed support to CiviCRM
- Aiming for 2024 Q1 launch
Community Organizing Functionality

• Donations, Events
• Petitions targeting local elected representatives
• Turfcutting to define areas for canvassing
• Phonebanking to enable volunteers to phone canvass using CallHub
• Etc.
Key Learnings

• Target a unique niche
• Involve user organizations from target market
• Solve their actual problems
  • E.g. formatting of official tax receipts
• Iterate
Thanks!

• To learn more or to discuss options for building your SaaS with CiviCRM, please contact joe.murray@jmaconsulting.biz