Building SaaS Offerings with CiviCRM

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CiviCamp Manchester, December 2023

SaaS versus CiviCRM Bulk Hosting

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' Donor Management System

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

To improve reliability changed to primary / secondary databases on separate VPSes

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

OBIAA

- 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
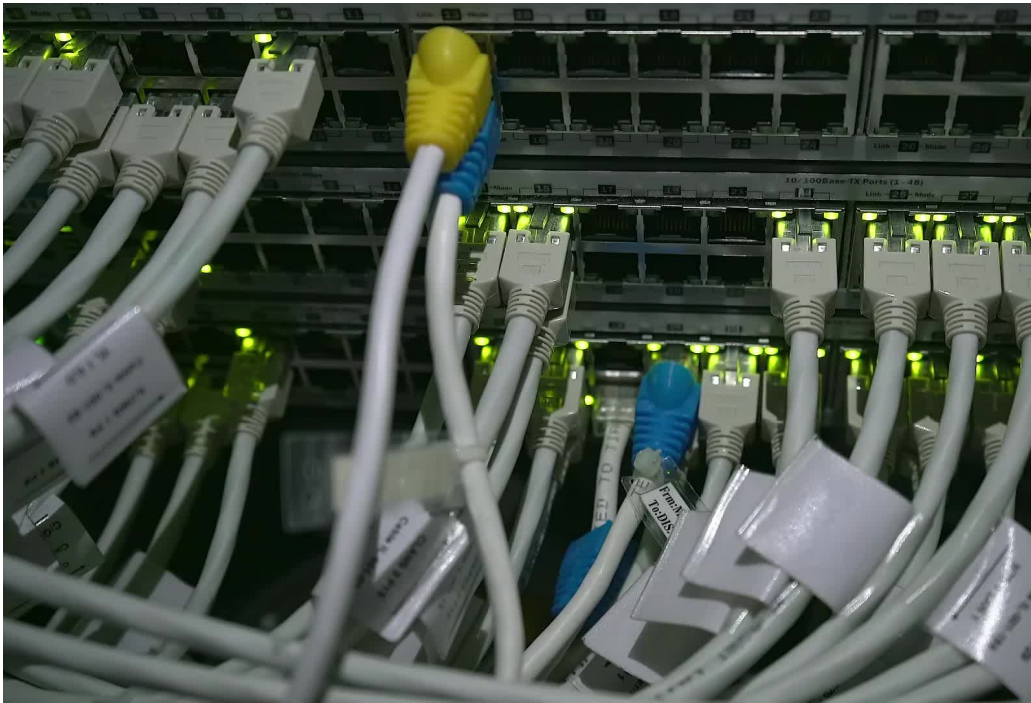
MainStreetRM

- 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