

## Business Case Study

# Roots Community Services

**CLIENT**

Roots Community Services

**PARTNERS**Richard Clifford Consulting Corp  
Centricity360**PROJECT**Selection of a new Case  
Management Application.**SERVICES**Digital Transformation  
Consulting Services**LOCATION**

Mississauga, Ontario.

**PROJECT DATE**

2021 | 2022

**CHALLENGE**

Roots Community Services (RootsCS) experienced steady growth under their Executive Director, Angela Carter, establishing much-needed programs and services for the underserved Black, African and Caribbean communities of the Peel and Halton Regions. This growth continued, even during the unprecedented COVID-19 pandemic.

RootsCS is a multi-service charitable organization that provides culturally relevant programs and services to inspire residents, primarily from the Black, African and Caribbean communities, to make positive changes in their lives and within their communities. For more than 35 years, RootsCS has been giving hope to and uplifting individuals in the Region of Peel and other areas of the Greater Toronto Area through caring and compassionate counselling and support.

Ms. Carter used her passion for technology and perseverance to keep RootsCS moving forward. Whenever a challenge arose, she quickly found a technical solution to overcome it; and, in some cases, multiple options to provide flexibility. And in most situations, Ms. Carter also set up the new software and trained her staff on how to use it. However, with greater demands for her time, a growing list of software under her purview, and a team with varying technical confidence and skills, complexities managing the RootsCS software and providing adequate training were mounting. Technology quickly became an impediment.

In addition, the rapid switch to remote working, resulting from government-mandated office closures, made it more difficult to resolve even minor technical issues. While in the office, employees could quickly get help from management or a tech-savvy colleague nearby. However, frustration set in when this support was no longer nearby.

Frustration with their inability to solve what felt like daily software issues. Some staff resorted to more manual workarounds. Instead of capturing data in their database, they reverted to handwritten notes. The manual workarounds were less reliable, resulting in reporting inconsistencies, which led to administrators spending increasing time going back to their team attempting to resolve data-capture mishaps.

Accurate reporting is essential for winning non-profit grants and measuring the value that the funding promises to deliver. And recently, funders were requesting more transparency and granular reporting. Hence the reporting inconsistencies became more urgent and concerning.

## SOLUTION

Ms. Carter turned to her network, engaging our combined consulting services, Richard Clifford (Richard Clifford Consulting Corporation) and Richard Bolton (Centricity360), to help RootsCS:

1. **Conduct an audit of technology tools and usage**
2. **Determine which software tools to keep;**
3. **Ensure that these tools get correctly implemented, and;**
4. **Suitably train their staff.**

We presented a three-phased approach to RootsCS. Phase one included a report identifying all of the current software and its costs, while phase two recommended which software to remove, keep, and replace. We would coordinate the new software implementation and staff training in phase three.

We interviewed the Executive Director and board of directors during the phase one assessment to understand the organization's essence and plans. We conducted extensive interviews and surveys with staff and other similar non-profit organizations to better understand RootsCS' micro and macro environments. The interviews and surveys led to a software audit and discussions with RootsCS's external IT consultants. The culmination of these efforts helped develop a visual map of the organization's software-related workflow, making it easier to identify pain points.

1. **Several software programs performed duplicated or overlapping functions. We could eliminate 75% of the software by selecting one general administrative platform (Google Workspaces), resulting in more consistent file formats, cloud-based access, easy integration with standard applications, and uniform information flow within the organization.**
2. **The core functionality that RootsCS needed was client management. However, their existing software was dated and difficult to use. We elected to procure a new SaaS tool that better met their needs.**
3. **RootsCS needed a documented training program covering the primary software used, their mandated processes and recommended guidelines, and a plan to ensure every staff member completed the training.**
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In phase two, we turned our attention to procuring RootsCS with a new client management software. Issues recognized surrounding the existing client management software represented more than 80% of the challenges pinpointed. Our assessment helped determine a prioritized list of criteria used to rank and qualify thirteen software solutions chosen as potential alternatives, shortlisting the top three. Interviews and demonstrations of the shortlisted vendors followed, helping to eliminate the weakest of the three, and the Executive Director and select managers participated in final demos of the top two vendors.

After the vendor interviews and software demos, we created a cost-benefit analysis to help RootsCS objectively select the winner of the two closely matched remaining vendors. We helped the RootsCS leadership team explain the rationale behind the software changes to their staff to ensure that they appreciated the necessity of the changes. And we walked the staff through the planned implementation, training, and change management process.

Phase three focused predominantly on implementation and training with the new client management system, AlayaCare. The staff needed to switch to the new system before their upcoming fiscal year, so we worked with AlayaCare to suggest an expedited onboarding process that reduced their typical implementation phase from 12 weeks to four weeks. We helped identify two of RootsCS' staff to act as power users during onboarding, recognizing their ability to learn and adapt quickly and their comprehensive knowledge of RootsCS programs and services. We worked closely with these power users, helping them design and deliver a training program using Google Classroom, and coordinating staff communications and ongoing surveys to keep track of user acceptance of the new software.

## RESULT

RootsCS have done an exceptional job quickly adapting to their new client management system and a reduced selection of software tools. The two power users brought confidence and calm to the rest of the staff and freed the Executive Director to continue with her busy schedule, unimpeded for the most part, easing everyone's concerns about the rapid changes. The training documentation continues to grow and evolve as a living document made easily accessible through Google Classroom. While there are still a few staff holdouts to the changes, it's been easier to identify them and provide additional one-on-one help.

## HIGHLIGHTS

- Reduced the footprint of software tools from more than ten down to three primary tools
- Procured an essential client management system picked from thirteen candidate alternatives
- Reduced the implementation and training onboarding time from 12 to 4 weeks
- Freed the Executive Director to continue to grow the organization, unimpeded by technology distractions
- Discovered two dynamic power users to lead future software changes and adoption

## ACKNOWLEDGEMENTS

A special thank you for the contributions from the following partners:

**Richard Clifford** | Richard Clifford Consulting Corp.

## TESTIMONIALS

*It is said, "one's word is their bond". We can attest to your incredible leadership, attention to details, patience and most importantly the producing of comprehensive outcomes so the most effective decisions can be made. We are satisfied with the work done and you both did an amazing job - we are pleased! Thank you so much!*

**Shane Joseph BSW, MSW, RSW, MBA (he/him)**

**Associate Executive Director**

**Roots Community Services Inc.**

*I appreciate the work that Richard Clifford and Richard Bolton did for RootsCS. They took time to understand our services and culture with patience and consideration to offer solutions that best met our needs. I highly recommend their consulting services.*

**Angela J Carter**

**Executive Director**

**Roots Community Services Inc.**

## ABOUT ROOTS COMMUNITY SERVICES

Roots Community Services Inc. is a charitable organization that provides culturally relevant programs and services to inspire residents in the Region of Peel, primarily from the Black and Caribbean communities, to make positive changes in their lives and within their communities.

## ABOUT RICHARD CLIFFORD CONSULTING CORP

My consulting background includes decades of experience supporting organizations through technology, complemented by an MBA in Digital Transformation from McMaster University and a BCom in Business Technology Management from Ryerson University. I've consulted in business-to-business, business-to-consumer, direct-to-consumer, business-to-government and non-profit markets.

## ABOUT CENTRICITY360

Centricity360 is a forward-thinking consulting company delivering strategic marketing, business development and related technology services helping business leaders drive revenue growth through innovation and digital transformation.

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