



blackbaud®  
**DEVELOPERS’  
CONFERENCE**  
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# Customize, Configure, or Change Management: Which to Choose?

BLACKBAUD CRM™ TRACK

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*Session Host: Trevor Kelly*



# Safe Harbor Statement

This presentation contains forward-looking statements that involve inherent risks, uncertainties and assumptions. It outlines Blackbaud's current plans and general product direction as of the date this presentation was created. Functionality described in this presentation that is not currently available is subject to change at any time, without notice, at Blackbaud's sole discretion. It does not represent a commitment to develop or release specific features within the timeframe discussed, according to the presented design, or at all. Please make any purchase decisions based on features and functionality that are currently available.



# Customization of Blackbaud Solutions

As a Blackbaud customer, your Authorized Support Contacts retain the responsibility for providing internal support for Customizations of your Blackbaud solutions by:

- Providing direct support to answer questions regarding Subscription functionality, internal business practices, and troubleshooting processes to Your Non-Authorized Users
- Providing direct support to answer questions regarding Customization specifications, features, intended usage, and Error correction and troubleshooting processes to Your Non-Authorized Users



## David Hendershot

*Pronouns: He/Him/His*

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DENVER, CO

13 YEARS AT BLACKBAUD



## Brandon Winchester

*Pronouns: He/Him/His*

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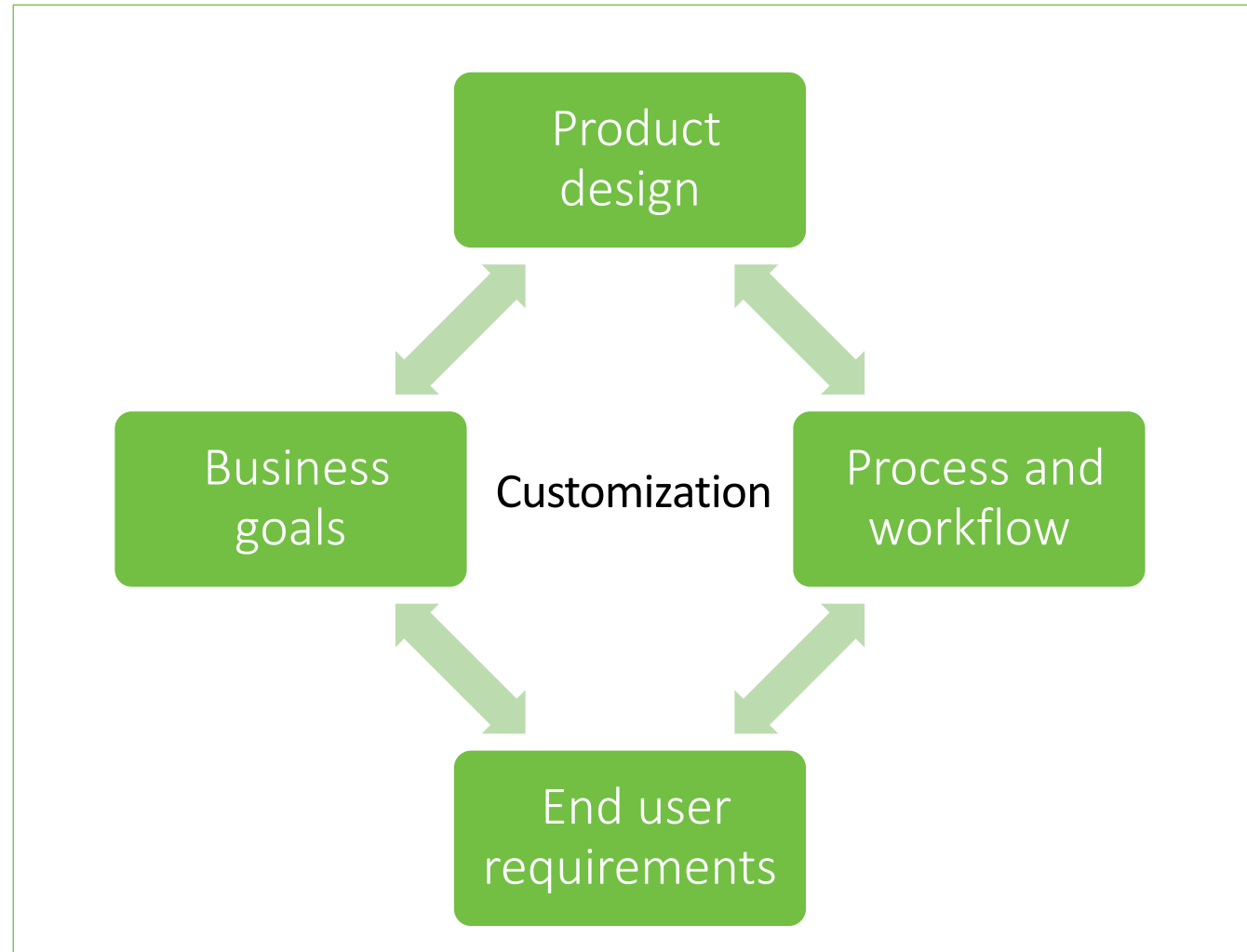
CHARLESTON, SC

24 *FANTASTIC* YEARS AT BLACKBAUD



# Customize or not?

## Technical Teams



# Session Goal and Agenda



*Real-world advice on what to consider when deciding to implement a custom solution.*

Blackbaud CRM Flexibility

Options for functionality

See some code

Q & A

Appendix



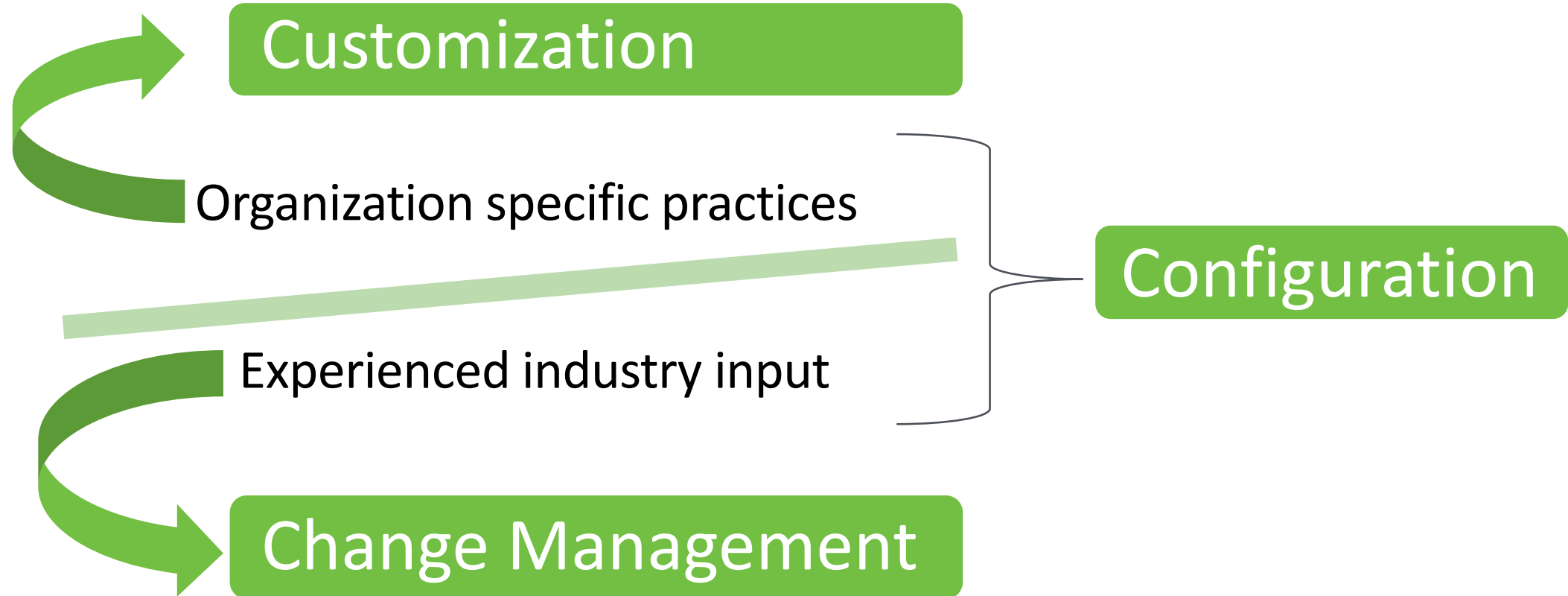
# Blackbaud CRM Flexibility

Software design influences how we work. How we work, influences software design.

Enterprise clients wanted flexibility when it came to using our software to help run their organization:

- Use the software in a way that was tailored to their specific needs
- Input from Blackbaud on broader industry practices and open to changing to accommodate that input

# Blackbaud CRM Flexibility





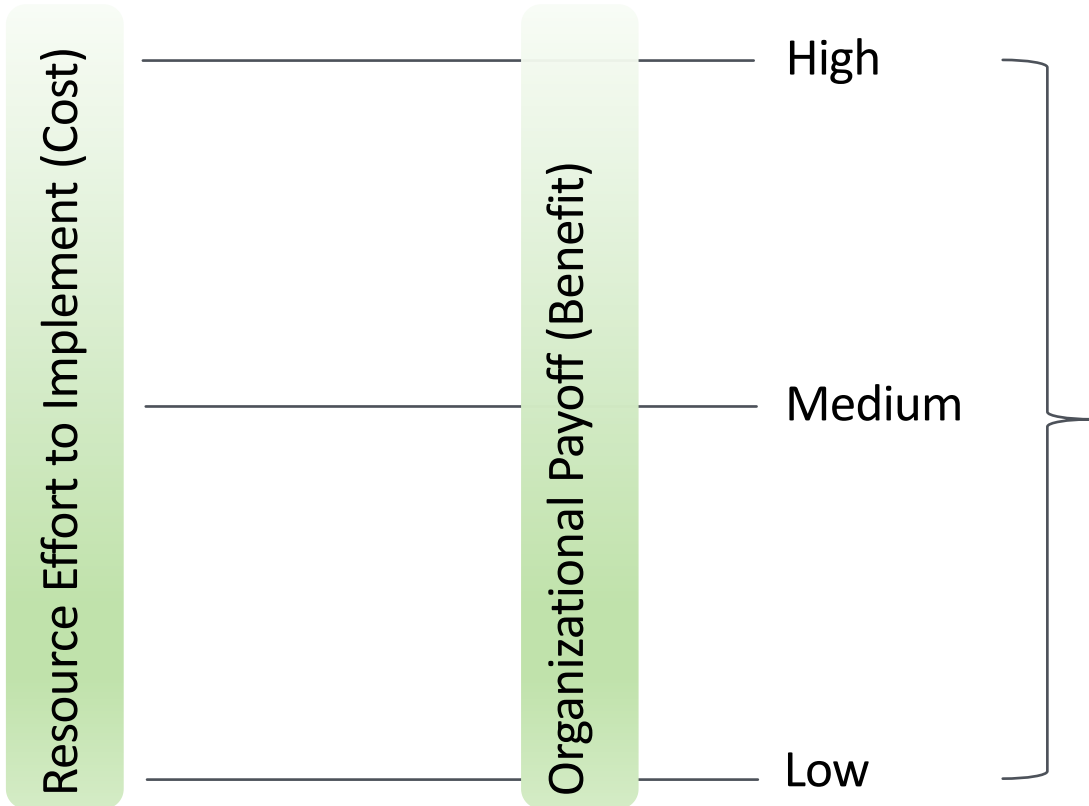


## Terms and definitions

- Change Management: a task or process that's part of the standard Blackbaud CRM product, isn't altered in any way and is adopted by your organization. Essentially, you change how you work to meet the software's design
- Configuration: an existing, out-of-box process or task whose outcomes and behavior can be altered with some user input. Page designer is a great example of configuration changes
- Customization: *at least one* artifact of some kind is created in order to accomplish a task. That artifact is usually a catalog item in the Blackbaud CRM world.

We need to acknowledge that Blackbaud CRM clients are a varied and complex group of organizations.

# Cost vs Benefit

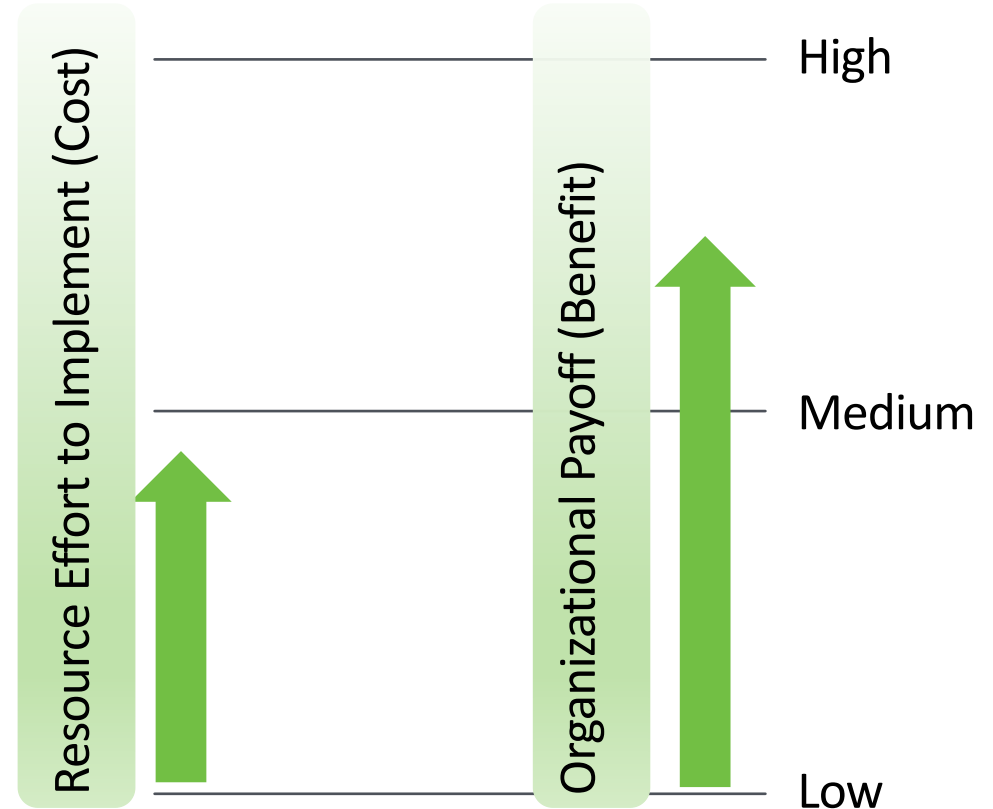


- Evaluate costs and benefits *before* you start any code or changes
- Socialize with your end users, talk to Blackbaud, talk to other clients
- Change is okay.....
- Waste isn't
- Get the longest lifespan that you can
- Engineers can say, "No"



# Change Management

- There's an assumption built into this discussion that the out-of-box design or feature set won't be what your organization needs. Don't rely on that assumption.
- How *loyal* are your users to a design or process versus what may work better? Or just might be new?
- Organizational tolerance for uniqueness
- *Typically* tend towards low to medium effort but the benefits can be high. This is a long-term investment





## Pros

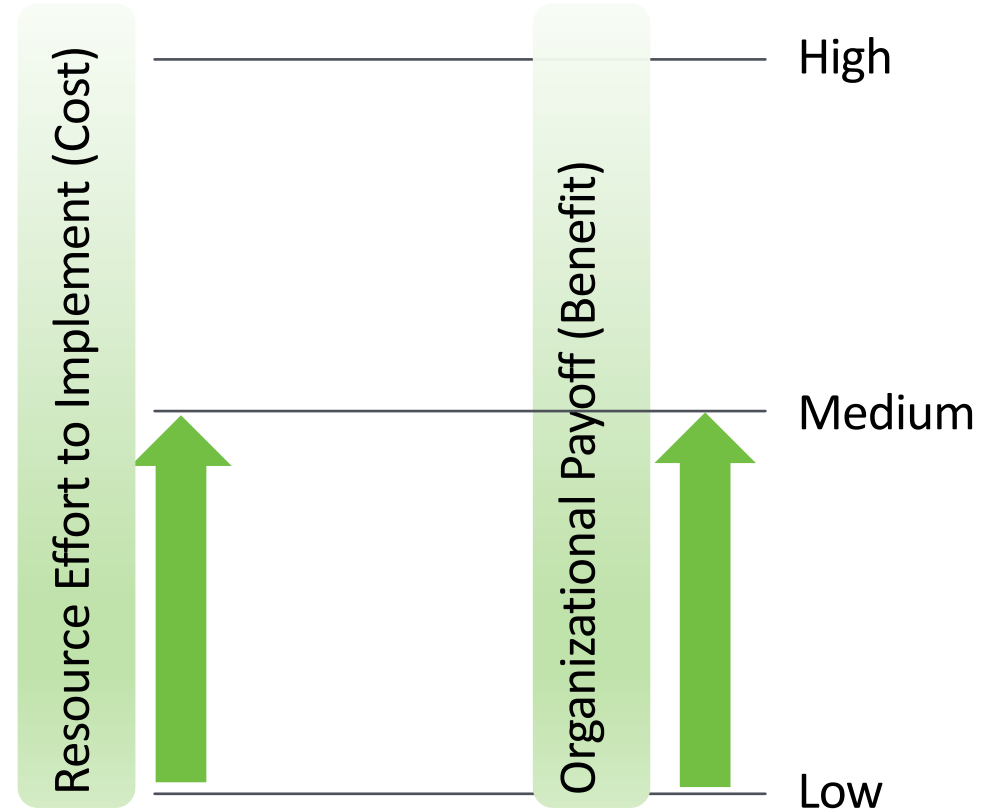
- Working within the ecosystem:
  - Support
  - Documentation
  - Defect fixes
  - Shared experience
  - Industry input
  - Feature enhancements
  - End-to-end
- Delta may not be significant

## Cons

- Delta *may* be significant
- Organizational loyalty to process
- Industry experiences versus organizational experience
- Change management can be difficult

# Configuration

- Balance between organization specific needs and Blackbaud delivered design
- Generally, when and how to use some type of configurable task will be determined by whether there is configuration available
- *Typically* tend towards low to medium effort and low to medium payoff
- Be cautious that they don't become unmanageable





## Pros

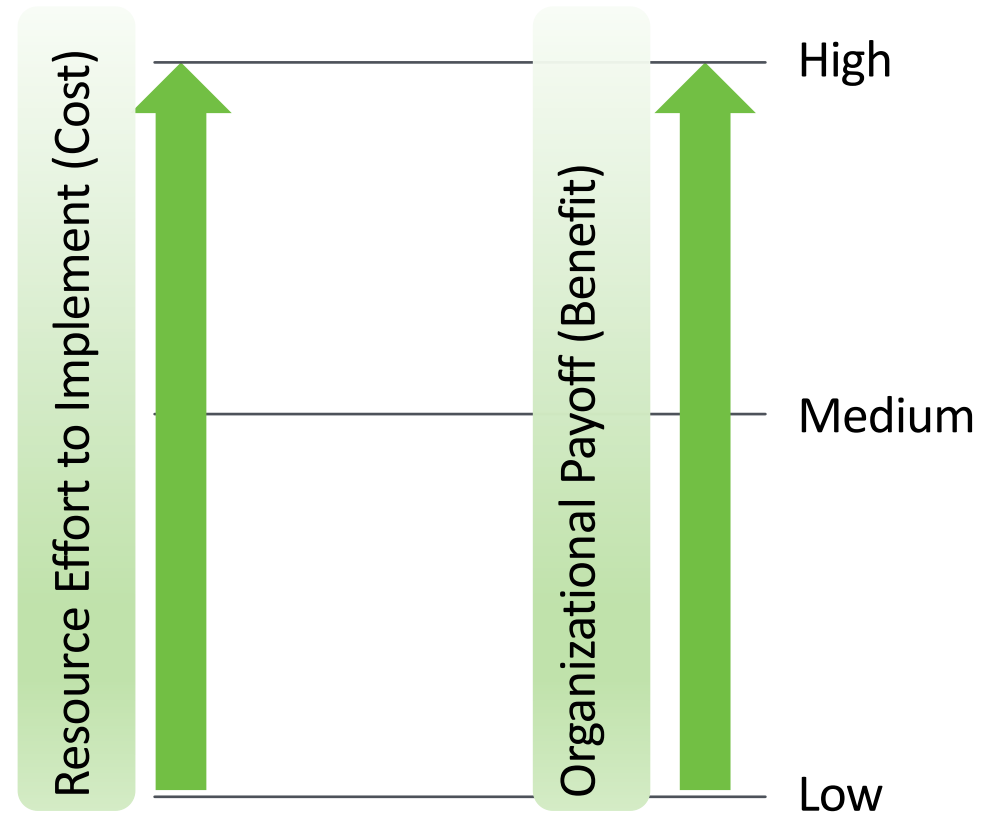
- Working within the ecosystem
- Great balance between set features and custom needs
- Much *less* of the overhead of customizing

## Cons

- Relies on existing configurability
- When available, still working within parameters set by Blackbaud
- Easy to get out of hand
- *Some* of the overhead that comes with customizations

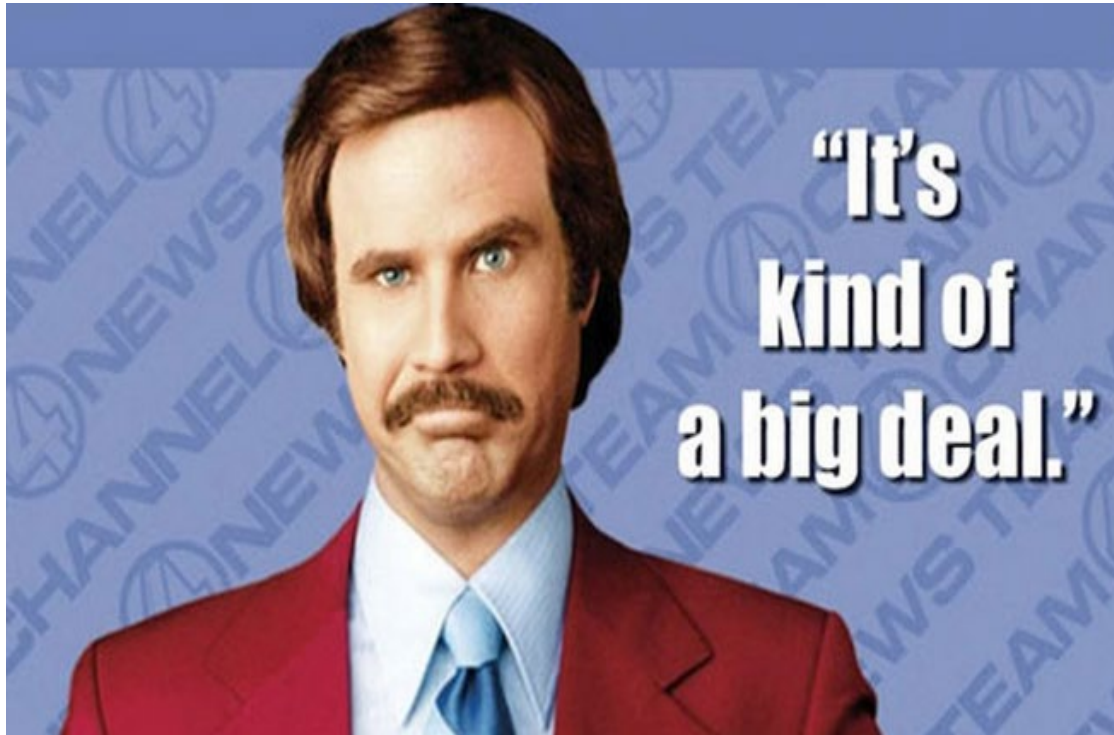
# Customization

- Customizations tend towards the highest effort and highest benefit.
- Beware of the hidden and long-term costs. Where do you store your code? How do you deploy it? Is it documented in case someone leaves?
- Don't forget that you need to train and educate your user, internal *and* external



## Pros

- You get exactly **what you want**



## Cons

- Development overhead
  - Short-term and long-term
- Working within a development ecosystem
- Specific experience not shared with industry or other clients...or Blackbaud
- End user training
- Documentation





## Multi-select Filter

Several people at the last “Ask a Blackbaud Developer” wanted to know if there was a way to add a multi-select filter to features like data lists. This is complicated because...

- Multi-select filter needs to be able to handle a wide variety of options decided at runtime
- Options must fit within the data list filter section
- Data lists can only “preload” data in the UI model

# Research Process

- Do any features offer equivalent functionality?
  - Hierarchy filter is similar but more complex than we need
- How does it accomplish this functionality?
  - Uses a Custom UI Model Metadata spec
  - Instantiates a helper class to manage site selection
  - Syncs selected sites back to original form when confirmed
  - Adds “select all” and “unselect all” buttons





# Warning! Prototype code ahead.

- Code is a proof of concept
- It has not been fully tested or refactored
- It may contain issues and limitations
- It may skip some best practices for clarity and brevity




Let's get our hands dirty with some code

Code will be uploaded to <https://github.com/blackbaud-community/Blackbaud-CRM-MultiSelect>

# Appendix A: Decision making matrix questions



- Evaluate costs and benefits *before* you start any code or changes
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- Is there a way to get the functionality you need, or something very close to it, through some type of configuration or configurable element?

- Is the configuration low effort?
- Is the configuration sustainable?

Yes?  Change the configuration

- Can your organization adapt or change process to the way in which the Blackbaud software is designed and shipped?

- Is the current process efficient or noticeably and measurably beneficial?
- Is your organization *loyal* to the current process?
- Is there an external element dictating the need, which can't be altered?
- Is there a feature coming from Blackbaud that will be what you want?

No?  Implement process management and use the Blackbaud design



- Before creating customizations

- Does your organization have a tolerance for the short-term and the long-term development costs?
  - Testing of customizations? Code storage and deployment? Performance testing? Redundancy? Developer and testing instances? Deployment and monitoring in more than one environment?
- Are your users and developers aligned and is there open communication between them?
  - Requirements and design? Issues reporting and resolution?
- Is the scope of the customization defined and socialized? Is the scope of the solution as simple as it can be made?
- Are the benefits of having a custom solution understood throughout the organization? Have the costs been debated and shared? Organizationally, is there agreement that the benefits outweigh the cost?

No?



Consider re-evaluating options



#bbdevdays

Thank you!