Should LibreOrganize Be Called an OMS?

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BUS 5112: Marketing Management

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May 31, 2020

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The Wikipedia entry for customer relationship management (CRM) defines it as "an approach to managing a company's interaction with current and potential customers". The article then states that "One important aspect of the CRM approach is the systems of CRM that compile data from a range of different communication channels, including a company's website, telephone, email, live chat, marketing materials and more recently, social media." Next the article traces the history of CRM systems from the emergence of CRM as a concept in the 1970s and the use at that time of spreadsheets to process customer data, through the emergence of custom database applications specifically designed for CRM beginning with the ACT! system first released in 1986, to systems such as PeopleSoft and Salesforce.com at the end of the twentieth century. It also mentions SugarCRM, which first appeared in 2004, as the first open source CRM (Wikipedia contributors, 2020, May 31). At present there are a wide variety of these platforms, with the Wikipedia entry comparing them listing thirty (2020, March 14). An extension of CMS to include features supporting the use of social media to engage with customers is called Social CRM (Hart & Kassem, 2012, & Wikipedia contributors, 2020, April 27).

This history is relevant to us at NOVA Web Development because we are working on a software system we are calling LibreOrganize that has as its broad vision creating a software platform to help users who self identify as being part of an organization such as a union, political party, or social movement to be able to better coordinate their activities. While I am unaware of any available tools specifically designed to do this, CRMs appeared to be the closest existent

match, since they have people and interactions between them in specific times and places modelled in the system.

When we first began investigating this problem several years ago, we did what free software developers usually do when trying to solve a problem - begin by investigating what tools already exist that could be used as is or modified to fit the problem. This led us to CiviCRM, which repurposes the "C" in CRM to *constituency* relationship management, and explicitly targets its platform at advocacy groups , aligning closely with what we wanted to do. CiviCRM has also been around since 2005, and is used for fundraising by organizations with which we feel a close connection such as Creative Commons, the Free Software Foundation, and the Wikimedia Foundation. Kabissa, the Space for Change in Africa, uses CiviCRM to provide CRM capabilities to over 1,500 organizations (Wikipedia contributors, 2020, May 7). Finally, one of the web development coops that provided the inspiration for NOVA Web Development, Palante Technology Cooperative, provides customization of CiviCRM as a key part of its business offering (n.d.). With this as the context, we made the decision a few years ago to learn CiviCRM and to reorient ourselves from being a Python programming shop to mastering the PHP programming language we would need to hack on CiviCRM. After a few months, however, we abandoned this effort for two reasons. The first was that we were historically, intellectually, academically, and even emotionally firmly rooted in the Python community. The switch was both a heavy lift for us and just did not feel right. The second reason was that, given the first reason, we found a way out when a friend of ours told us about Tendenci. Tendenci brands itself as "The Open Source Association Management Software designed specifically for the needs of non-profits and associations." (n.d.). It is written in Python and is built with the Django web

application framework, just the software stack we were hoping to use. Once we found Tendenci, we dropped CiviCRM and began learning to hack on Tendenci.

I have reflected ever since on how our initial investigation failed to turn up Tendenci. By calling itself an *association* management system (AMS) rather than a CMS, it did not appear in web searches for CMSs, even though the two systems are very similar. Association management appears to get far less attention than customer management does. The Wikipedia entry for association management at the time I am writing this has not been touched in over eight months, while the CMS entry was last updated a few hours ago. The entire article is only four paragraphs long, and it defines association management as "a field of management which focuses on the management of associations" (Wikipedia contributors, 2019, September 12). It does mention membership software, in the last paragraph, as being typically used by association management professionals. The entry for membership software has "association management system" as synonymous. The article does not mention any examples of AMS software, but does have the following list of essential features:

1. Storing and editing member information in a database.

2. Creating, renewing, upgrading and downgrading memberships.

3. Communicating with members by email, social media, telephone or post.

together with the following list of optional ones:

1. Organizing and selling tickets to events or series' of events.

2. Publishing and delivering textual or audio-visual content.

3. Providing advertising opportunities via listings or targeted placements.

4. Facilitating interaction and collaborative file sharing between members.

5. Tracking members' interests and activity to provide relevant services.

6. Raising supplementary income from donations (Wikipedia contributors, 2019, October 1).

We at NOVA Web Development will be forever grateful to the wonderful folks at Tendenci for sharing their software, which greatly aided our development team in learning the skills we needed to develop this kind of application. It is a testament to the value and virtue of software freedom and helps reinforce our commitment to it. That said, early this year we made the decision to rebuild LibreOrganize from scratch rather than to continue to try to make it as a modified version of Tendenci. I was aware of the arguments against doing this, captured very well in Dharmesh Shah's blog post titled "Why You Should (Almost) Never Rewrite Your Software" (2007). There were technical reasons we made the decision to do it in spite of this, having mostly to do with Tendenci's heavy integration with something in the Django web framework called the Django Admin Interface (Django Software Foundation, 2020).

More important than the technical reasons, however, was the realization that what we want to develop is not quite an AMS, or if it is, it has a different target audience than Tendenci does. LibreOrganize will have each of the three essential features of an AMS, which manage members and membership communications. It was when we got to the list of optional features that we found ourselves fighting with the way Tendenci does things, realizing that we were dealing with a different problem. The clearest example of this was the way Tendenci deals with "events". Tendenci's perspective is that of a centrally organized association holding events that have fundraising as a core goal. LibreOrganize, by contrast, was being built for grassroots organizations that were organized more horizontally than vertically, and which wanted to track

participation at meetings not events, for which there was never a fee associated with attendance.

We could have added a new meeting module to Tendenci, but the fact that it did not already exist

suggested a difference in point of view for the system than we were coming from. We also

wanted online voting to be one of our core features, something that is not included at all in

Tendenci's large list of modules. Finally, while we have not developed this capability yet, we

want to see LibreOrganize be useful for bottom up grassroots organizing, which would mean

including ways within the system for members with similar interests to be able to find each other

and self organize. This seems to be taking us away from association management into a kind of

software that does not appear to have a name yet. Perhaps, as if the nomenclature were not

confusing enough already, it should be called an *organizing* management system (OMS).

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