



DIGITAL TRANSFORMATION

North York Arts

THE ASK

North York Arts, a **community arts organization in Toronto**, approached Sympl to **implement a CRM** to centralize their data inside a “**single source of truth**”. The team struggled to manage their data and needed a streamlined approach to ease daily tasks such as digital marketing, event/donor management, and reporting.

OUR APPROACH

The project was split into three phases: **brainstorming** requirements; **implementation** of the CRM; and a **rollout** of the system.

Phase 1: Brainstorming

- A series of discussions with multiple NYA team members to deeply understand their tasks and requirements.
- Researching, and testing multiple CRM/DMS candidates before moving to implementation.

Phase 2: Implementation

- Structuring a database model. Merging and cleaning 7,000+ contacts. Creating tags and smart segments that update automatically for easy organization.
- Adding the necessary integrations, configuring analytics, and rigorously testing all features end-to-end.

Phase 3: Rollout

- Multiple hands-on sessions with NYA teams, demonstrating step-by-step usage for NYA’s day-to-day tasks and workflows.
- Developed training manuals followed by ongoing support.

THE IMPACT

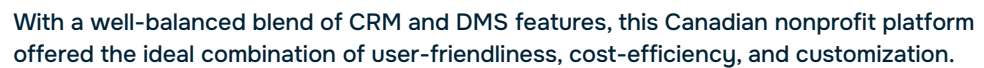
- Removed dependency on third-party forms, spreadsheets, and external folders. Improved data consistency by centralizing all contact information in a single, well-structured system.
- Consolidated diverse functions into one platform, eliminating reliance on costly third-party tools.
- Optimized workflows with automation and dynamic segmentations that enable the NYA team to accomplish more efficiently with fewer resources.
- Smoothly transitioned the NYA team to Keela as a long-term solution through hands-on training, ongoing support, and continuous platform improvements driven by user feedback.

SERVICES DELIVERED

CRM IMPLEMENTATION & MIGRATION
FULL-STACK INTEGRATION

DATA MODELLING AND DESIGN
CUSTOM REPORTING & ANALYTICS

AUTOMATED WORKFLOW DESIGN
TRAINING & TECHNICAL SUPPORT



Awareness: How do artists discover NYA?

- Google Search
- Program need of music
- Flyers - Nightingales
- Booklets
- Taste of month picks
- Social Media
- Booking/Outreach

Consideration: How do they learn more about NYA? What convinces them to sign up?

- Music of community
- Events & workshops in touring
- Social Media
- Landing Page

Conversion: How do they sign up? Can it be improved?

- Music of community
- Events & workshops in touring
- Artist Award
- Booking/Outreach
- Landing Page

Loyalty: How does NYA continues to engage with these artists?

- Landing Page
- Social Media
- Hiring
- Stage
- Artist Development
- Booking/Outreach

Preferred Name	Preferred Name	Single-line Text	Yes	No
Pronouns	Pronouns	Multiple Choice (multi select)	☒	☐
Postal Code	Postal Code	Single-line Text	☐	☐
Area	Area you live in:	Multiple Choice (multi select)	☒	☐
Under 18	Are you under the age of 18?	Yes/No	☐	☐
Parent/Guardian Phone Number	Parent/Guardian Phone Number	Number	☒	☐
Parent/Guardian Email	Parent/Guardian Email	Single-line Text	☐	☐
Emergency Contact Phone Number	Emergency Contact Phone Number	Single-line Text	☒	☐
I would like to learn volunteer for	I would like to learn volunteer for	Multiple Choice (multi select)	☐	☐
Why are you interested in volunteering with us?	Why are you interested in volunteering with us?	Multi-line Text	☒	☐
Reasons for Participation	Please tell us if you have specific needs in order to participate in this/these program(s).	Multi-line Text	☐	☐
Food Allergies	Do you have any food allergies?	Multi-line Text	☒	☐
How did you hear about NYA volunteer opportunities?	How did you hear about NYA volunteer opportunities?	Multiple Choice (multi select)	☒	☐
Previously familiar with North York	Did you know about North York Arts	Yes/No	☐	☐

[illegible]

North York Art - Tech Stack

The diagram illustrates the North York Art Tech Stack, showing the flow of data and payments between various services:

- Stripe** (Payments) connects to **Keela** (Fundraising + Payments, Mailing Platform, Affiliates, Volunteer Management, Reports & KPIs).
- Keela** connects to **Quickbooks** (Donations).
- Keela** connects to **Eventbrite** (Ticketing/Event Donations, Event Marketing, Reporting for Events).
- Eventbrite** connects to **Zapier** (Orders).
- Zapier** connects to **Keela** (Paid Tickets, Donations).
- Keela** connects to **Quickbooks** (Paid Tickets, Donations).

- Dashboard
- Contacts**
- Fundraising
- Impact Areas
- Campaigns
- Forms
- Communications
- Automation
- Memberships
- Reports

NAME

- ☐ Newsletter Subscribers: Close contacts
Artists, volunteers, donors, and board members who are subscribers.
- ☐ Survey Dec 2023 (postal codes unknown)
- ☐ Survey Dec 2023
- ☐ Donors: Recurring
Monthly donors from Canada Helps
- ☐ Donors: SYSBUNTs
Donated some years but unfortunately not this year.
- ☐ Donors: LYBUNTs
Donated last year but unfortunately not this year
- ☐ Donors: Never donated

The screenshot displays a dashboard interface with a top navigation bar containing links: Home, Forecasting, Transactions, Scheduled Security, Plugins, Tools, Admin, and Settings. Below the navigation bar, a section titled "Key Performance Indicators (KPIs)" is highlighted with a green status indicator. This section contains three KPI cards:

- Email Marketing Open Rate:** Shows a current value of 52% and a benchmark of 27%. The trend line graph shows a U-shaped curve, indicating an upward trend.
- Email Marketing Click Rate:** Shows a current value of 2% and a benchmark of 5%. The trend line graph shows a downward curve, indicating a downward trend.
- Contact List:** Shows a current value of 5,782. The trend line graph shows an upward curve, indicating an upward trend.

keelo

Premium

Menu

- Dashboard
- Contacts
- Fundraising
- Impact Areas
- Campaigns
- Forms
- Communications
- Automation

All Events

Events

3 Events

NAME	EVENT DATE
Mapping Our Neighborhoods Screening Event	Aug 31, 2023 - 03:30
Inspire North	Aug 18, 2023 - 03:00
Inspire North	Aug 18, 2023 - 10:00

North York Art
Training # 1 - Keela 101

symp1
SYMPHONY PROJECTS

ny101