PRO-TIPS

DATA CHECKLIST FOR **MOVING FROM eTAPESTRY** TO THE NONPROFIT SUCCESS PACK

KELL PARTNERS

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Considering a migration from eTapestry to Salesforce's Nonprofit Success Pack? Congratulations! You've found the most powerful nonprofit tool in the mobile era. Soon, your team will enjoy a unified perspective on the VIPs that make your organization tick.

But first, there's the migration. No small feat! In some ways, Salesforce and eTapestry are just incompatible. Issues such as fundraising structures, personas and organization links can be minefields during the big move.

The good news is that, through years of eTap-to-NPSP migration, KELL has fine-tuned a process to transform your data for its new environment. We've compiled our top seven suggestions for ensuring a smooth and successful migration.

PRO-TIPS

1

DEFINE THE CAMPAIGN STRUCTURE

Salesforce has a more clearly defined perspective on fundraising campaigns than eTapestry, which uses the concepts of Campaigns and Approaches. We've seen the latter get defined very differently for different nonprofits.

In Salesforce, fundraising is tracked through a hierarchy structure, which shows the way that different campaigns are related via the Parent Campaign field. Since Campaigns are grouped together within a specific initiative, the Salesforce structure allows orgs to more effectively track their marketing efforts. The fields within a hierarchy not only provide aggregate data for the Parent Campaign, but also for all the campaigns underneath it.

DATA PREP CHECKLIST:

- Review your use of Campaigns. Take a close look at how your organization uses an Approach. Does it refer to your method or the specific appeal, or something else? Are you using it at all?
- Talk to your consultant. At this point, KELL generally creates a spreadsheet of client campaigns to help the client define the new structure for Salesforce.
- Plan the migration with your consultant. Depending on the circumstances, it may be time to perform some transformation to help the old data fit the new system, or it may be possible to import the data directly into the new campaign hierarchy.

2

SEPARATE ORGANIZATIONS FROM INDIVIDUALS

In eTapestry, both individuals and organizations can be set up as Accounts. Some of our eTapestry clients come to us having created a custom field to indicate whether an Account is an organization or an individual, then used the field consistently throughout their system. That's fantastic, but very rare!

More commonly, the differences aren't clear at all. This will pose a problem for your migration. In Salesforce, individuals and organizations are two distinct entities and pulling them into Salesforce with no distinction would complicate the way they roll up into lots of valuable features.

DATA PREP CHECKLIST:

- Assess the situation in eTapestry. Do you have a field to indicate whether accounts are individuals or organizations? If so, run a report to see how many accounts have the indicator filled in. For the portion that are blank, manually define what they are.

- If you've never used such a field, you'll have to do it now. Apply it manually to all the records you want to import.

Performing this cleanup ahead of the migration takes quite a bit of time, but it will help ensure clean data and accurate reporting within your new Salesforce instance. It will also help you with some of the other data preparation tasks in this list, including the following three.

PRO-TIPS

3

STREAMLINE PERSONAS

Now that you know which contacts are individuals, consider eTapestry's concept of Personas. An account can have multiple personas to reflect various levels of salutation formality, different combinations of the household members, or a seasonal address.

The Persona concept doesn't exist in Salesforce. These variations are all addressed with the Household model. In this model, the standard Salesforce Account object acts as the household, with numerous constituents and gifts associated. Seasonal addresses are created through a secondary address with a seasonal override.

There's no easy way to fold multiple eTapestry Personas into one Salesforce account during a migration; careful preparation is necessary.

DATA PREP CHECKLIST:

- Review your data in eTapestry. Do you have a lot of accounts with multiple Personas? For example, the primary Persona may be John and Mary Smith, but variations may include Mary Smith, Johnny Smith, and Mr. and Mrs. John Smith.
- For accounts with multiple Personas, does the primary Persona tend to be the one you want to be reflected in the Salesforce Household account?
- With the answers in hand, talk to your consultant. He or she can help you develop a cleanup plan and migration logic to import the data into clearly defined records.

4

ALIGN AND DEDUPLICATE

Clean data is critical! This is a great time to resolve messy and duplicated contacts.

Do whole households in your database tend to be consolidated into one eTapestry account? Or do you have the John and Mary Smith account, plus another account for Mary Smith and her individual giving? Are salutations, first names, middle names, last names and suffixes separated into their appropriate fields? Or do you store "Mr. John A. Smith, Jr." all in one field?

To address these issues, KELL offers cleaning and deduplication as a standard service on every project. But if you have to DIY, see the next page for your "To Do" list.

DATA PREP CHECKLIST:

- At the end of the day or over a weekend, run the eTapestry Duplicate Report. This can take hours, and you won't be able to use many system features while it runs.
- Merge the duplicate accounts, making sure to preserve the correct information from each.
- The Duplicate Report won't catch everything, for example the system may not notice the similarity between two accounts when one of them has all the name information stuffed into one field. Use eTapestry's Name Conversion Tool to correct these entries, then re-run the Duplicate Report.

PRO-TIPS

5

CLEAN UP SOFT CREDITS

Salesforce aligns with fundraising best practices for soft credits. The ideal approach is to share recognition, but not tax credit, with someone other than the legal donor.

KELL often finds, however, that eTapestry users give soft credits to organizations—and not for a good reason. Perhaps a corporate foundation donates, and the nonprofit soft credits the parent corporation. Or a board member donates from his family foundation, rather than his personal account.

In the first example, it's not ideal recordkeeping to soft credit the corporation. In the second, it's simply inaccurate to soft credit the foundation. To prevent such occurrences, Salesforce only allows soft credits for individuals.

DATA PREP CHECKLIST:

- Run a report of all soft credits given to organizations. Review your business process.
- There are rare, legitimate reasons to award soft credit to an organization. Your consultant can create a workaround if it's important to preserve some of those instances in your records. KELL usually does this by creating an "Organizational Soft Credit" field on the gift. This field would be tracked separately from other soft credits, but you could still connect the fields for viewing and reporting.
- For the other situations, when the soft credit was applied incorrectly, perform manual cleanup within eTapestry ahead of the migration. For example, make sure the hard credit is awarded to the family foundation or donor-advised fund, while the soft credit is awarded to the individuals donating through those funds (rather than the other way around).

PRO-TIPS

6

REVIEW ORG-TO-ORG LINKS

eTapestry allows you to use links to create relationships between two organizations. In NPSP, links exist only from a person to an organization and from a person to another person.

Within the NPSP, you can connect individuals by creating a Relationship record and defining the type (such as Friend, Family or Husband) and the status (Former, Current). You'll link individuals to organizations by creating an Affiliation record and defining the role, the status and appropriate dates.

These differences between the two systems complicate the migration a bit. But hey, you've already done the hard work of defining your Individuals and Organizations! This'll be a piece of cake.

DATA PREP CHECKLIST:

- Run a report of org-to-org relationships. Determine how you have been using such links and whether they serve a valuable purpose.

- If you need to preserve them, your consultant can create an org-to-org relationship within Salesforce. KELL generally takes one of two options, depending on how you are using these links. If you are using such org-org relationships to track a Parent Account and its subsidiaries, standard Account hierarchies will usually do the trick. If you need to track many-to-many org relationships, we create a custom solution to accomplish your goals.

PRO-TIPS

7

MAP USER-DEFINED FIELDS

When user-defined fields are created in eTapestry and Salesforce, they serve much the same function in the interface and reporting. But it looks very different on the back end.

eTapestry is a rigid system, and the fields will always be organized in the same way in the back end. User-defined fields will always be found on a separate table, along with all the values associated with that field.

In Salesforce, however, user-defined fields will be incorporated into the table underlying the object that they are associated with in the user's experience. It's more of a true customization.

DATA PREP CHECKLIST:

- Give your consultant access to your database so they can take a backup through the API. With the backup in hand, KELL generally starts by reviewing the volume of user-defined fields. Your consultant can generate a full list.
- Determine which fields are truly useful. Look at your interface. Which ones are inactive and inaccurate? These are good candidates to leave behind, even if you want to track that data moving forward. Some fields can be combined. Others may be reformatted.
- Your consultant will create a data map that addresses all of those needs. This can be very time-intensive, even a weeks-long process. The end result, though, is fantastic and functional.

About KELL Partners

KELL Partners is a consulting firm specializing in Salesforce solutions for nonprofits.

KELL Partners has helped over 900 nonprofits implement and train on the Salesforce platform. With services ranging from KELL360™ to implementations with complex custom needs, application development and data migrations. KELL Partners provides the expertise to set up and configure Salesforce, along with the hands-on training, guidance, ongoing support and consulting nonprofits need to ensure success.

We want to hear from you!

If you want the lowdown on services, solutions, support and all the red-tape-defying feats we can do for orgs like yours, get in touch.

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