PRO-TIPS

DATA CHECKLIST FOR **MOVING YOUR ADVANCEMENT OFFICE FROM RAISERS EDGE** TO SALESFORCE

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Is your Advancement office planning a migration from The Raiser's Edge to Salesforce? Congratulations! You've found the most powerful fundraising management tool in the mobile era. Salesforce will give you a unified perspective on the relationships that support your mission.

But first, you'll need to do some prep work on your existing database to ensure an efficient migration. In addition to addressing the core differences between the two systems, you probably have some messy data after years of list imports, workarounds and staff changes. **The good news is that you're not the first organization to go through this. KELL Parters has completed over 75 data migrations from The Raiser's Edge to Salesforce, and we've compiled our top seven tips for ensuring a smooth and successful migration.**

PRO-TIPS

1

REVIEW INCONSISTENT FIELDS - IDENTIFY STANDARDS

The Raiser's Edge allows users to format field data as picklist values or freeform text. Freeform text can create inconsistencies over time, and you'll want to normalize these as much as possible.

Phone numbers are the most common source of inconsistency. The Raiser's Edge has standard phone types like "Home" or "Business", but after years of use, you may have accumulated some anomalies like "John's Wife" or "Addt'l Phone."

Salesforce has a single field for each phone type, and you likely won't need more than a few phone numbers. We'll talk about how to deal with contact data for spouses and other members of the household in Tip #3.

DATA PREP CHECKLIST:

- Document the files and lists you've imported into The Raiser's Edge from legacy or external systems. If these files created messy data, your implementation partner can help you make a plan to clean them up.
- Run queries to identify non-standard fields. Update the records with more consistent options or at least identify areas where you know you need help.
- Make a list of each phone type in your database. Try to segment the most common types from the outliers. All phone number data is important, and your implementation partner can help structure your Salesforce instance to accommodate your unique needs.
- Look for other pick lists with messy data and repeat the process you followed with phone types. Your implementation partner can help you work through the messiest ones.

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CLEAN UP NON-CONSTITUENT RECORDS

The Raiser's Edge allows users to create relationships by connecting a constituent directly to another—or simply entering a text name for the linked person or organization.

Theoretically, this flexibility allows users to quickly enter a constituent's employer or other relationship. The unintended effect, however, is that no true link will exist. By failing to make that connection, you lose the ability to see the individual when looking at the employer's record, even if you had previously "stored" that information.

Salesforce is generally more focused on data hygiene. It won't allow you to create a formal relationship unless a constituent record exists for both parties.

DATA PREP CHECKLIST:

- The two most common areas where we see these failed connections are in relationships and event participation. Review these areas to determine the extent of the problem.
- If the problem is small, create constituent records for all non-constituent parties in relationships, then replace text data with a meaningful link.
- If comprehensive manual clean-up isn't an option, consider tackling only those links involving the most active constituents. Based on your needs, you may choose an even more nuanced approach. One option is to create contacts for spouses and import constituent relationships, but disregard other non-spouse, non-constituent relationships.

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MAKE SURE SPOUSES & HOUSEHOLDS EXIST

On a related issue, The Raiser's Edge also allows users to "connect" spouses by entering the husband or wife as text on the main Constituent's record. Salesforce manages spouse relationships through the concept of a Household account.

The Household concept allows you to send mailings to a couple (or a household with a more complex makeup) without duplicating the mailing. This helpful strategy also tabulates all giving by members of that household. Plus, built-in features will allot a soft credit to other members of a Household account when one member donates, as well as create salutations and perform other beneficial automations.

The Household concept offers great features for new Salesforce adopters, but it does call for some extra work on the front end.

DATA PREP CHECKLIST:

- Review your data to see if spouses are entered as text. If they are, make sure your implementation partner can help with creating Household accounts from this data. (Note: KELL Partners can do this.)
- Evaluate whether such non-constituents appear in other relationships, too. If they do, then you'll need to include some deduplication work in your project plan.
- If you have spouse records that aren't linked, you may want to update those relationships prior to the migration.

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CLEAN UP ORGANIZATION RECORDS

The way that Salesforce handles data on organizations is aligned with fundraising best practices and common app integrations. That's great news! The Raiser's Edge uses a different approach, which can complicate migration efforts.

KELL HAS OBSERVED THIS CONFLICT IN SEVERAL KEY WAYS:

1. In Salesforce you can mail an appeal to an individual—an individual at an organization, but not the organization itself.
2. In Salesforce, email addresses are stored only on Contact (or Lead) records because email applications generally only email individuals.
3. The Raiser's Edge allows users to soft credit an organization on a gift, most commonly done during "pass through" gifts. This is not ideal recordkeeping, and Salesforce doesn't allow it.

DATA PREP CHECKLIST:

- Do you have lots of organization appeals? Create a "proxy" contact for each organization to add them to campaigns. Or disregard these historic appeals, and start fresh.

- Are there soft credits attributed to organizations? These are often best disregarded. If the feature is important, however, we recommend connecting the gift to the "Soft Credit Organization." This connection would only be for reference, however, and wouldn't roll into soft credit summaries. A third option is to apply the soft credits to proxy contacts.

- Do you have email addresses stored for organizations? You can manually address those before migration, disregard them as a whole, or import them into custom fields for reference only (not for integration with email functionality).

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MAP CONSTITUENT CODES AND ATTRIBUTES

Reporting in Salesforce is completely different than reporting in The Raiser's Edge. This is especially true for "codes" and "attributes".

The Raiser's Edge allows users to create these fields, then assign them to certain constituents. Codes tend to include simple titles such as Board Member, Alumni and Prospect. Attributes can be more complex. They often have related information in the Description or Comments field.

Information is often tracked in codes and attributes for lack of a better place. In Salesforce, this information will be stored across a variety of fields such as campaigns and events, where it could be used to run valuable reports.

DATA PREP CHECKLIST:

- Got outdated codes and attributes? The best option may be to disregard them entirely.
- Got codes and attributes that can be combined? For example, you may want to combine codes for Prospective Board, Current Board and Former Board into one Board Member Status field.
- For remaining fields, talk to your implementation partner about easing reporting in the new system. KELL provides this service by default. We can create a Salesforce table to track all the same information in a similar way. A better option, however, is to map your codes and attributes to a combination of campaigns, events, and other standard and custom fields, based on how the information is used.

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CREATE A NEW CAMPAIGN STRUCTURE

Another major difference between The Raiser's Edge and Salesforce is the organization of fundraising data. The Raiser's Edge has a rigid structure of Campaigns, Appeals and Packages.

Salesforce offers more flexibility to organize campaigns into a hierarchy that reflects your unique fundraising processes. To maintain the Campaign-Appeal-Package structure in Salesforce, just connect three campaigns together in the desired hierarchy.

Another big variation is that in The Raiser's Edge, two gifts can be connected to the same appeal but to different campaigns. In Salesforce, each appeal can only be connected to one campaign. This forces organizations into a more organized fundraising process.

DATA PREP CHECKLIST:

- Create your institution's campaign structure. Sit down with your development team, and think about how you're using appeals, campaigns, packages and funds. How should they look in the future?

- Articulate logic rules for your ideal structure. Your implementation partner can help. KELL offers two main options. You can keep Appeal and Campaign as separate fields on the gift record. This works well for certain organizations, but a more ideal approach is to define a parent campaign for each appeal and disregard the other campaigns during the migration. If gifts have a campaign and no appeal, we sometimes import those with the campaign at the top and then "Unspecified Appeal."

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LINK PROPOSALS AND GIFTS

One final way that Salesforce and The Raiser's Edge really differ is through the relationship between proposals and gifts. We see this issue come up quite often.

In Salesforce, proposals for a grant or major giving appeal must be combined into a single record. And that record has to track the gift, from the moment the fundraiser begins to think about submitting the request all the way to the point of receiving (or not receiving) the gift.

So, when importing data from The Raiser's Edge into Salesforce, we'll need to merge any proposals that are isolated from their resulting gift into a single major gift or grant record.

DATA PREP CHECKLIST:

- Review your institution's data. Do you have a history of unlinked proposals and gifts?
- If yes, comb through your database and link any realized gifts to the proposal that brought them in. Now your consultant will be able to effectively merge these two records into one during the migration.

About KELL Partners

KELL Partners helps educational institutions and nonprofits go farther and faster with Salesforce.

KELL Partners has helped over 1,500 nonprofit and educational institutions implement and adopt the Salesforce platform. Whether your Salesforce goals are limited to a single department or span your entire institution, KELL Partners provides the best practice expertise to get you up and running on Salesforce, along with the hands-on training, guidance and consulting you need to ensure long-term 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 institutions like yours, get in touch.

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