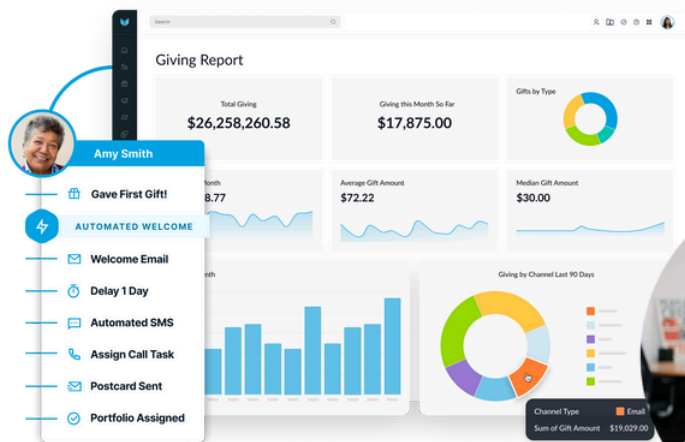


The background is a dynamic composition of overlapping circles and organic shapes in two shades of blue: a vibrant medium blue and a deeper navy blue. These shapes are set against a white background, creating a modern, abstract pattern.

CRM Conversion Playbook

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The Last CRM Conversion You'll Ever Have To Do

A good CRM is vital for nonprofits as it enhances donor management by tracking everything you would need to have personalized communication and targeted fundraising efforts with your supports. It streamlines operations by centralizing data, automating tasks, and reducing errors, freeing up staff to focus on mission-driven activities. CRMs also provide valuable data insights, improve donor retention, and facilitate better internal collaboration, ultimately boosting the organization's efficiency and effectiveness in achieving its goals.

However, nonprofit CRMs often don't do all of that, requiring nonprofits to work with multiple tools and platforms. This leads to missing or duplicate data, a lack of personalization, and siloed teams.

This CRM conversion playbook is here to guide you through the arduous yet rewarding process of switching CRMs. It's more than simply looking at software reviews and choosing the one with the most stars. It's a process that requires effort and resources. It can be overwhelming, so we're here to help with this playbook.



PART 1

Pre-Conversion Planning

Pre-Conversion Planning

Assessing current CRM and needs

You've taken the first step: recognizing the need for a new CRM. But what should you do next? It's essential to understand why you need this change and how to select the right CRM for your nonprofit.

01

Evaluate the limitations and challenges of your current CRM: What is holding you back? Are you using multiple tools that don't integrate easily? Are potential donors leaving your donation pages without donating? Dig into your pain points so you can make a clear plan moving forward.

02

Define your goals and what you need from a new CRM: You identified your pain points and current challenges. Take those and build out what you need from your CRM. Write clear and achievable goals so that you know exactly what to look for when researching new CRM platforms.

03

Discuss current silos and team interdependencies: This is often a big pain point. What silos are you currently experiencing? Which teams need to work together more effectively? Understanding silos and interdependencies will help you define what your people need out of a nonprofit CRM.

04

Align your stakeholders: It's time to get everyone on board with a switch. Be sure your stakeholders understand the need for a new CRM.

05

Map out key dates: This includes more than the date your CRM goes live—it includes your entire timeline. You need to ensure plenty of time for data cleanup, system configuration, testing, and more.

06

Understand what you need to prove value: What milestones do you need to hit to prove the switch was worth the associated costs? Return to the goals that you outlined. Will achieving those prove the value of the change? Have your stakeholders agree on milestones in their areas of expertise and use those to help define success.

Stakeholder Involvement

Establishing a well-rounded project team is crucial for the success of any initiative, and this is particularly true for a project as complex as a CRM switch.

It's essential to not only assemble a core group of dedicated individuals but also to have contingency or backup team members in place to address any unexpected departures. A comprehensive team should span various departments within the organization, beyond just the fundraising team, to ensure robust decision-making and to identify potential downstream impacts.

Key roles in this team include:



Executive Sponsor

Steer the project and make high-level decisions



Development Team Leadership

Champions the adoption and act as a bridge between the team and the migrating CRM



Data Administrator

Lead data migration and verify data integrity



Representatives from Finance and Marketing

Covers all financial and fundraising and marketing aspects.

This diverse representation ensures that all critical perspectives are considered, enhancing the project's effectiveness and resilience.

Every department should be represented, whether it is considered a stakeholder or not. Keeping everyone informed and involved ensures an efficient and smooth CRM conversion.



Related: [How to Sell Your CRM Conversion Internally: A Strategic Guide](#)

Organizational Change Management

Converting to a new CRM system often involves significant changes in workflows and processes especially for the key stakeholders mentioned above. Managing this change effectively is crucial for a smooth transition. It cuts down on confusion, frustration, and wasted time.

As you move through the process of switching CRMs, be sure to keep these strategies in mind:

Communicate the Benefits

Clearly articulate the need for the change and the benefits of a new CRM to the team. Will the automation features save them time? Or perhaps showcase how features in the new system can make fundraising easier.

Provide Support

Offer ongoing support to help users adapt to the new system. Be sure all users have access to support documents and training sessions. Also ensure that stakeholders have their voices heard and their concerns are addressed.

Gather Feedback

Regularly seek feedback from users to address the pain points they are facing in the current CRM and any concerns or issues with switching to a new one. Once implementation begins, continue to seek feedback and compile it to discuss with your customer success team.

Change is hard—especially when it affects the flow of work. It's completely normal to get pushback, so be prepared to discuss those concerns, include compatibility issues, complexity, cost, and more.

Addressing these concerns with transparent communication, sufficient training, and strong support is essential to ease the transition, foster buy-in, and help staff see the benefits of the new system for the organization's long-term goals.

Budget & Resources

When integrating a CRM system into a nonprofit organization, it's crucial to carefully manage the budget and resources to ensure a successful implementation.

Start by estimating the costs associated with the CRM, including software purchases, training, and any necessary upgrades to existing technology.

Proving ROI is a must when securing budget for a new CRM. Be sure you can prove how the new CRM will increase fundraising and save money overall by offering efficiency so you can cut other tools that are costing you money.



Allocate resources efficiently by defining specific roles and responsibilities for team members involved in the project. Ensure everyone understands their tasks and deadlines. This is crucial to keeping the project on track.

Additionally, plan to balance the ongoing needs of daily operations with the demands of CRM implementation and training, establishing a schedule that allows for regular maintenance and updates to the CRM system and your organization's standard processes.



Research & Selection

When evaluating potential nonprofit CRM systems, it is crucial to revisit your organizational goals to ensure that your chosen system aligns with them.



Aligning CRM selection with advancement strategies is an important yet overlooked step for nonprofit organizations to maximize efficiency and impact. When nonprofits choose technology without considering their advancement strategy, they risk incurring unnecessary costs, such as implementation fees, staff time, and potential revenue loss.

A CRM that aligns with a nonprofit's specific goals—like fostering deeper donor relationships or streamlining operations—enables more effective stewardship and engagement. This ensures that the technology supports the organization's broader objectives, such as fundraising and donor retention, ultimately driving sustainable growth. Adopting a phased approach to align the CRM with an actionable advancement strategy allows nonprofits to create a cohesive roadmap that guarantees success.

During each vendor demo, keep these goals at the forefront and ensure that each conversation addresses how the CRM will meet these objectives. After each demo, hold internal discussions to assess whether the system supports your goals and fits within the organization's direction and goals.

In addition, align your purchasing and migration timelines with your internal schedules, taking into account your fiscal calendar and any upcoming events or deadlines that might impact the timing of your purchase and implementation.

Starting the migration process promptly after purchase will help you see value from the CRM and maintain momentum. You don't want to sit on your big purchase and not use it. Deadline deviations won't prevent migration, but discussing them with your new vendor is important for effective resource planning. Ultimately, make your final selection based on how well the system integrates with your goals, timelines, and overall organizational needs.



PART 2

People Management

People Management

Integrating a CRM system into a nonprofit organization involves more than just implementing new technology. It requires careful attention to your staff, the actual people who will be handling the change. It is important to confirm that all team members are prepared for the changes in technology and processes and foster effective communication across departments. This section of the playbook provides guidance on preparing internal teams for these changes, “managing up” to leadership, and communicating effectively across departments.

Preparing Internal Teams for Technology and Process Change

Successfully integrating a CRM system into a nonprofit begins with preparing your internal teams for the upcoming changes.

This preparation involves several key steps:

01 EDUCATION

Begin by educating your team about the new CRM system and its benefits. Explain how it will streamline their work, improve donor relationships, and enhance the organization's overall efficiency.

It is extremely important to explain the WHY behind the change. It might even be helpful to create a WHY statement that everyone can hold on to when times get tough.

02 ADDRESSING CONCERNS & RESISTANCE

Hold open forums where team members can voice their concerns and ask questions. Addressing these concerns early can prevent resistance later on.

Identify and enlist change champions within the organization who can help advocate for the new system and assist their peers in the transition. Creating a cross-functional team of champions will be extremely helpful when implementing a new CRM. This team can help you answer questions throughout the organization, speak the same language, and champion the project through the process. This also allows for clear communication across departments when decisions are being made so every team feels like they have a voice.

How to 'Manage Up' Organizational Leadership

Gaining the support of organizational leadership is crucial for the success of the CRM integration. Managing up involves effectively communicating the benefits and progress of the project to those at the top.

01 PRESENT A STRONG BUSINESS CASE

- **ROI and Benefits:** Clearly articulate the return on investment (ROI) and the benefits the CRM system will bring to the organization. Use data and case studies to support your argument.
- **Alignment with Goals:** Show how the CRM system aligns with the organization's strategic goals and mission.

02 REGULAR UPDATES

- **Status Reports:** Provide regular status reports to leadership, highlighting milestones achieved, challenges faced, and upcoming steps.
- **Transparency:** Be transparent about any issues or delays, and present a plan for addressing them.

03 ENGAGE LEADERSHIP IN THE PROCESS

- **Involvement:** Involve leadership in key decisions and milestones. Their active participation can boost their buy-in and support.
- **Feedback:** Encourage feedback from leadership and incorporate their suggestions into the implementation process.

Communicating Across Departments

Effective communication across departments is essential to ensure a smooth integration of the CRM system.

Here are some strategies to foster clear and consistent communication:

01 ESTABLISH COMMUNICATION CHANNELS

- **Dedicated Platforms:** Use dedicated communication platforms like Slack or Microsoft Teams for project-related discussions. Consider creating a channel rather than group messages so everything is in one place.
- **Regular Meetings:** Schedule regular meetings with your cross-functional internal implementation team to discuss progress, address concerns, and share updates.

02 CREATE A COMMUNICATION PLAN

- **Frequency of Updates:** Determine the frequency of internal project updates and checkpoints. Weekly or bi-weekly updates can keep everyone informed without overwhelming them.
- **Content of Updates:** Be sure updates are concise and relevant, focusing on key achievements, upcoming tasks, and any roadblocks.
- **Channel of Updates:** Determine if updates should be via email or in a meeting depending on the audience and the content.

By focusing on these aspects of people management, you can ensure a smoother and more successful integration of the CRM system into your nonprofit organization.



PART 3

Data Audit & Migration Plan

Data Audit & Migration Plan

Switching to a new CRM system is a significant step for any nonprofit organization. However, the success of this transition largely hinges on a meticulous data audit and migration plan.

Data Audit

01 IDENTIFY LEGACY SYSTEMS

The first step in your data audit is to identify all the systems that currently contain relevant legacy data. These could include donor management systems, email marketing platforms, event management tools, and any other databases that hold crucial information. By creating an inventory of these systems, you ensure that no valuable data is overlooked during the migration process.

02 SECURING ACCESS

Designate a team member with admin-level access to these legacy systems. Admin-level access is vital for both data extraction and migration. This individual will have the necessary permissions to export data, make necessary adjustments, and troubleshoot any issues that may arise during the process.

03 REVIEWING & CLEANING EXISTING DATA

Before migrating your data, you have to review and clean it. This involves checking for accuracy, completeness, and relevance. Remove duplicate records, correct errors, and update outdated information. Clean data guarantees a smoother migration process and helps maintain data integrity in your new CRM system.

04 IDENTIFYING DATA TO BE MIGRATED

Determine which data is essential to migrate and which can be archived or discarded. Prioritize data that will provide ongoing value and support your organization's current needs. This might include donor information, past contributions, volunteer details, and event records.

05 ASSESSING LEGACY SYSTEMS INTEGRATION

Decide if any of your legacy systems will be retained and integrated with your new CRM platform. Some systems may continue to serve a specific purpose, and integrating them with your new CRM could provide a more cohesive data environment. This integration needs to be carefully planned to ensure seamless operation and data flow between systems.

Data Mapping & Migration Plan

01 MAPPING OLD DATA FIELDS TO NEW CRM FIELDS

Data mapping involves aligning fields from your legacy systems to those in your new CRM. This step ensures that data is accurately transferred and correctly placed in the new system. Create a detailed map that matches old data fields with their corresponding fields in the new CRM. This will serve as a reference during the migration process. Your new CRM provider should take this project on.

02 CREATING A DETAILED MIGRATION PLAN

Develop a comprehensive migration plan that documents all your decisions and processes. This plan should outline each step of the migration, from data extraction to final integration, including timelines and responsible parties. A detailed plan helps in managing the migration efficiently and minimizes potential disruptions. Work with your project manager at the new CRM to complete this step.

03 DOCUMENTING MIGRATION DECISIONS

During the migration process, you'll make critical decisions about how and where your legacy data will be housed in the new CRM. It's important to document these decisions as they will affect how your data is used and managed going forward. Pay attention to any changes in data processing or management practices compared to your current systems and be sure everyone involved understands those changes.

04 LEVERAGING TRAINING & SUPPORT

As you go through live training sessions, workshops, or migration consultations with your new CRM provider, take notes on any significant decisions or changes that impact your data management processes. Many CRM providers, including Virtuous, offer workbooks or documentation tools to help you track these changes. Utilize these resources to keep a record of key decisions and process adjustments.

Setting Up & Customizing Your Nonprofit's New System

When implementing a new system for your nonprofit, your implementation team must thoroughly discuss and understand all aspects of the agreement. This initial phase is essential for a smooth transition and effective use of the new system.

Initial Configuration & Customization

Start by reviewing the features outlined in the agreement with your implementation team. This discussion should cover how each feature aligns with your nonprofit's needs and objectives.

Once the implementation team is comfortable with the agreement, identify any specific customization requirements based on your organization's unique processes and workflows. Customization might include setting up user roles, adjusting data fields, or configuring reporting options.

Assign responsibilities to team members for various configuration tasks. Each member needs to understand their role in the setup process and be equipped with the necessary tools and information.

Provide team members with training on how to configure and customize the system effectively. This may involve hands-on sessions or reviewing documentation provided by the system vendor.

Integrating with Existing Systems & Tools

Create a comprehensive list of your existing systems and tools that the new system will need to integrate with. This might include donor management systems, accounting software, or communication tools.

Once you have an inventory of existing tools and systems, develop a detailed integration plan that outlines how data will flow between systems, what data will be shared, and any potential challenges that may arise.

Next, you'll need to work on your technical setup and testing. Work closely with your IT team or the system vendor to establish the necessary connections between the new system and your existing tools. This may involve configuring APIs, setting up data transfer protocols, or adjusting security settings.

Conduct thorough testing to ensure that the integrations are working as expected. This includes verifying data accuracy, checking for any system conflicts, and ensuring smooth communication between tools.

By addressing these key areas—initial configuration, customization, and integration—you can set your nonprofit up for success with its new system. Effective planning and clear communication within your implementation team will help ensure a seamless setup and a smooth transition to your new tools.



PART 4

Implementation & Training

Implementation & Training

When embarking on a CRM implementation, having a well-defined project timeline is crucial to ensuring a smooth transition. This timeline should serve as a roadmap, guiding your organization through each phase of the implementation process. Start by establishing start and end dates for the project. This not only sets clear expectations but also helps in managing resources and tracking progress effectively. It is helpful to build flexibility into those dates. Inevitably, the deadlines will need to change, whether it's vacations, changes in teams, or simply workloads.

Your CRM provider should ideally offer you a preliminary implementation timeline. This plan typically includes key milestones such as data migration stages, system configuration, user training sessions, and go-live dates. However, if your CRM provider does not provide this plan upfront, don't hesitate to request a customized timeline tailored to your organization's specific needs.

A comprehensive project plan should outline:



MIGRATION MILESTONES

Key dates for critical activities such as data migration testing and live database delivery.



SCHEDULED INTERACTIONS

Regular meetings with the implementation team to review progress, address issues, and make necessary adjustments.



TRAINING & ROLLOUT

Dates for user training sessions and the final rollout of the system.

Key Milestones & Checkpoints

Key milestones in your CRM implementation should be clearly defined and monitored throughout the project. Here are some important milestones to include:

Project Kickoff	The official start date of your CRM implementation project.
Data Migration Testing	Initial testing of data migration to confirm accuracy and completeness.
User Training Completion	Completion of all training sessions for core team members.
Go-Live Date	The official date when the CRM system is fully operational, and your legacy data has been migrate into it.
Post-Go-Live Review	A review session to assess the implementation process and address any immediate issues.

It is essential to communicate these milestones clearly to both your internal team and the CRM provider. Sharing the timeline transparently, such as posting it in a visible location or hosting it in a shared drive, keeps everyone aligned and aware of the project's progress.

Communication & Ongoing Engagement

It is vital to maintain effective communication throughout the implementation process. There are many working parts, so you need to be clear every step of the way. Be sure to discuss the implementation timeline with your internal team regularly.

We recommend establishing a weekly or bi-weekly meeting schedule to review action items, make decisions, and assess testing progress. This regular check-in helps resolve any issues that arise and keeps the team on task.

Training & Support

A CRM implementation is only as good as its training. All core team members who plan to use the CRM should participate in relevant training sessions. Developing a structured training program will help protect your time and financial investment by ensuring that users are proficient with the new system from the start.

Here are some steps to create an effective training program:

01

Identify Training Needs

Assess the specific needs of your team members and customize training accordingly.

02

Develop Training Materials

Create comprehensive training materials, including manuals, tutorials, and FAQs.

03

Schedule Training Sessions

Plan and schedule training sessions well in advance, ensuring that all relevant users can attend.

Establishing Standard Operating Procedures

Establishing standard operating procedures (SOPs) to align users on platform utilization is essential. SOPs should provide clear guidelines on how the CRM should be used for various tasks, ensuring consistency and efficiency across the team. There may be different SOPs depending on the user.



Testing & Quality Assurance

A successful CRM implementation requires rigorous testing to be sure the system functions as expected. Bring in your testing team, including representatives from various departments who can provide diverse perspectives. The more eyes on the system, the better the chance of identifying and resolving issues.

Running Tests and Addressing Issues

Conduct thorough tests to verify data integrity and system functionality.

This includes:

- **Data Integrity Testing:** Ensure data is accurately migrated and no information is lost or corrupted.
- **System Functionality Testing:** Verify that all features and functionalities of the CRM are working as intended.

Address any issues or bugs promptly. Document these issues and work closely with the CRM provider to resolve them efficiently.

User Acceptance (UA) Testing

User Acceptance Testing (UA) involves having actual users test the CRM system to confirm that it meets their needs and expectations. This testing phase is crucial for identifying any remaining issues before the system goes live. Encourage users to provide feedback and make necessary adjustments based on their input.

Your provider's team will put data where it makes sense, but you know your donors best so take ownership of your donors and their data. This testing phase is a great opportunity to look at your donors and determine what works for them.

You most likely have contacts in your system with whom you are familiar. Choose somewhere between five to 10 familiar contacts and take a close look at their records.

(We recommend avoiding searching by name in case there are duplicate records and instead use the ID from your current platform.)

If possible, have their record available in your legacy system so you can compare the data. Check for accuracy and note any errors.

User Acceptance (UA) Testing Cont.

You should pay close attention to details such as the contact name, contact methods, tags, notes, gifts, totals, relationships, and custom fields.

Once you've spot-checked some familiar contacts, do the same with five to 10 randomly selected contacts. Once again, compare the data to your legacy system to ensure accuracy. Continue to spot-check multiple areas of the CRM, like gift history, campaigns, and custom data against your legacy system. Be sure to discuss any issues with your implementation team. Issues like incorrect gift amounts or a large number of missing contacts should be flagged for immediate review.

By following these guidelines, you can expect a well-organized CRM implementation process, provide your team with the support they need, and achieve a successful transition to your new system.





PART 5

Go-Live & Post-Implementation

Go-Live & Post-Implementation

The go-live phase is a critical juncture in your nonprofit's journey toward optimizing its operations with a new system. It's the moment when all the planning, preparation, and hard work come together. It's essential to approach this phase with meticulous planning and attention to detail to prepare for a smooth transition and set your organization up for success. Here's how you can navigate this crucial period effectively.

Post-Implementation Setup Items

There are occasions where some features (like publishing your donation forms, processing your first gift import, and configuring giving integrations) can only be set up after your data migration is complete to mitigate possible challenges with your legacy data import.

If this is the case, your new CRM provider should communicate this beforehand. Then, work with your project manager to create a plan to complete these configuration items immediately following your go-live date. Doing this quickly ensures you see full value from your purchase from the beginning and allows you to use the implementation team for support along the way.

Final Data Migration and Validation

The final data migration is the last and arguably the most crucial step before your new system goes live. It involves transferring all your data from the old system to the new one. This data includes donor information, financial records, and historical data that you need to retain for future reference and reporting.

Validation is an integral part of this process. After migration, thoroughly check that all data has been accurately transferred and is functioning correctly in the new system. Run tests to verify that donor records are intact, financial transactions are accurate, and historical data is complete. This step is essential to avoid discrepancies that could impact your operations post-launch.

Quality Assurance is Crucial

Quality Assurance (QA) testing cannot be overlooked. QA involves systematically checking the platform to identify any issues before the go-live date. This includes testing functionalities, workflows, integrations, and performance under expected loads. A rigorous QA process helps to identify and resolve potential problems, ensuring that your new system operates smoothly from day one.

QA is not just about finding and fixing bugs; **it's about ensuring the system meets your specific needs and expectations.** During this phase, engage with key users to get their feedback and make necessary adjustments.

Remember, the goal is to make sure that everything works as intended and that the system aligns with your operational requirements.

Know Your Donors and Data

Remember that your data is a valuable asset. You are the expert on your donors, and it's vital to confirm that their information is accurately represented in the new system. Review the data mappings and ensure all donor details, including important notes, are correctly captured and accessible.

Communicate with your team to confirm that all critical donor information—such as contact details, donation history, and engagement preferences—is correctly transferred. Any discrepancies should be addressed promptly to maintain the integrity of your donor relationships.

Communicating Go-Live Plans and Timing

Effective communication is key to a successful go-live. Inform your organization about the go-live plans and timing well in advance. Provide clear updates on when the transition will occur, what to expect, and how it will impact daily operations.

Share a detailed timeline, including any downtime or system unavailability periods, and outline the steps your team will need to follow during the transition. This transparency helps manage expectations and reduces uncertainty among staff and stakeholders.

Planning the Logistics

Address the logistics surrounding the go-live to guarantee a smooth transition.

This includes:

Accounting

Coordinate with your finance team to ensure that all financial data and processes are accurately integrated into the new system. Plan for any necessary adjustments or reconciliations.

Legacy System Usage

Determine how long the old system will remain in use and plan for its eventual shutdown. Confirm that any critical data that still needs to be accessed is readily available.

Remaining Trainings

Conduct final training sessions to familiarize staff with the new system. Address any gaps in knowledge and ensure that everyone is comfortable with their new workflows.

Congrats!

The go-live is a significant achievement worth celebrating. This was a time-consuming process that required a lot of coordination and cooperation. Take time to acknowledge the hard work of your team and the successful implementation of the new system.

Organize a gathering to celebrate with your staff if you're in person. This could be a team lunch, a small party, or a recognition event to honor the contributions of everyone involved. If your team is remote, organize a virtual celebration and consider sending appreciation gifts to your team.

Share your success on social media to engage with your supporters and highlight your organization's progress. It's a great opportunity to showcase your commitment to improving your operations and serving your community better. You might even encourage others to do the same.

Monitoring and Support

Once the new system is live, you should focus on monitoring its performance and ensuring user adoption.

Keep a close eye on the system's performance, especially during the initial days. Monitor for any issues that may arise and address them promptly. Your CRM partner is there to help you –don't hesitate to ask for help.

Ensure that staff members are adapting to the new system. Offer support and guidance as needed and proactively address any challenges they encounter. Consider offering continual training and support for team members who need it.

Feedback and Continuous Improvement

Collect feedback from users regularly to gauge their experience with the new system. Use surveys, interviews, or feedback forms to gather insights on what's working well and what could be improved.

Based on the feedback, work with your provider to make necessary adjustments and updates to enhance the system's functionality and user experience. Continuous improvement is key to maximizing the benefits of your new system and keeping employees engaged.

By following these steps, you can confidently navigate the go-live phase, ensuring a smooth transition to your new system and setting the stage for continued success.



Success!

Your Last CRM Conversion EVER is Complete!

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