Avoiding **Software Migration Disasters**: Lessons from **Conversions**, Small to Big

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PRACTICAL WISDOM FOR NONPROFIT ACCIDENTAL TECHIES

Agenda for today's session

Introductions: Who are you talking to today and what's our experience?

Anatomy: What comprises a software migration project?

Preparing: How can you arm yourself with the right strategies?

Practicalities: What actually goes on behind the scenes?

Pitfalls: Why do some projects go wrong, and others go smoothly?

Curious?: No holds barred, ask us anything you want about tech

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Nonprofit tech **inspires us everyday**

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Building the Modern
Fundraising Ecosystem

Maureen Wallbeoff

Nonprofit Digital Strategist &
Technology Coach

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What happens in a **migration project**?

You've probably heard **disaster stories**. You might even have experienced a **bumpy migration** yourself.

But database migrations don't have to be a waking nightmare. You just need a **decent plan**, a spirit of collaboration, and **lots of communication** to do it right.

How can you **organize** a migration project?

4-Phased Approach

Most database or CRM conversion projects will be organized into these "stages"

KICK-OFF / DISCOVERY	TECH SETUP, DATA MIGRATION	TESTING & TRAINING	GOING LIVE & SUPPORT
• Project Timeline	• New CRM Setup	• Data Load Test	• System Cut Over Date
• Data Discovery	• Admin Roles	• Data Load Fixes	• Extended Training
• Data Mapping	• Customization	• Staff Training	• Documentation
• Use Cases	• Data Prep/Cleaning	• Final Data Load	• Reporting Set Up
• Technical Plan	• Integrations	• Moving Sustainers	• Troubleshooting
		• Integrations **(!)**	
		• Customization **(!)**	

Who's **responsible** for what?

No assumptions allowed! Use a **Project Charter** to document your agreements about roles & responsibilities:

- *Inside your team & staff*
- *With your software partner*
- *With third-party vendors / consultants*

A simple **"RACI" Chart** is probably all you need:

1. **Responsible**: Who performs an activity or does the work
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Reviewing your data: **identifying sources**

Your Audience(s): Who are the different audiences that you engage with?

Tools Used: What software platforms do you use to engage those audiences?

Attribution Problem: Are you collecting individually-attributable information?

Redundancy & Truth: Is data duplicated across systems, and who is right?

Before vs. After: What systems will change (migration), and which ones will continue to be used (integration)?

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Your audiences: **who are they**?

With their **wallet**, e.g. donations, event registrations, class fees
Indicates a predisposition to engage financially with your organization

With their **time**, e.g. volunteerism, event attendance, in-person support
Indicates a predisposition to engage on behalf of your organization

With their **attention**, e.g. email marketing, social media, direct mail
Indicates a predisposition to engage with and listen to your messaging

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Your operational tools: **what are they**?

As close to the source as possible!

Not "filtered" through other mediums

FINANCIAL ENGAGEMENT	TIME-BASED ENGAGEMENT	MARKETING ENGAGEMENT
PayPal	eventbrite	mailchimp
gofundme	SignUpGenius	Constant Contact
facebook DONATE	VolunteerHub	Campaign Monitor
	volgistics Volunteer Logistics	salesforce marketing cloud

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Quality of data: not everything is created equal

Solving for **individually attributable**: one action = one person with no doubt
No "broad-based" attributions on large audience segments, digital ads, print, etc.

Some kind of **matching criteria** to attribute across different engagements
Uniquely (to the best you feel comfortable) identifiable: email, name + address, etc.

"Muddy" data or data from platforms w/ cross applicability
Accounting platforms, generic payment processing platforms with irrelevant data

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It’s not all sunshine & roses: **overlaps & conflicts**

Is there one “system of truth” or "**record of truth**"?
Identifying if there is a primary CRM, already centralized collection of data

How can you identify what is **already redundant** from other sources?
Donations from PayPal that are already in the database, and therefore can be ignored

Is there **deeper information** from other, duplicative sources?
e.g. the PayPal donations having information on what “items” people “donated” to

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How can you **organize** a migration project?

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KICK-OFF / DISCOVERY

- Project Timeline
- Data Discovery
- Data Mapping
- Use Cases
- Technical Plan

TECH SETUP, DATA MIGRATION

- New CRM Setup
- Admin Roles
- Customization
- Data Prep/Cleaning
- Integrations

TESTING & TRAINING

- Data Load Test
- Data Load Fixes
- Staff Training
- Final Data Load
- Moving Sustainers
- Integrations **(!)**
- Customization **(!)**

GOING LIVE & SUPPORT

- System Cut Over Date
- Extended Training
- Documentation
- Reporting Set Up
- Troubleshooting

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Suggested plan of attack: **step by step**

1. Accomplish a **1-1 parity mapping** from your previous system to the new one
2. Identify a **switch-over date** from only one system at a time (system of record)
3. After switch-over, **clean-up** / **mass fixes** on top of a live system
4. Integrate **additional sources** of information (usually automations)
5. Only then do you start **considering migrating** other related services **(!)**

(!) Migrating things **in parallel**? Efficient or not?

If you have other departments that can **exist** / **migrate independently**
e.g. a volunteer coordinator or events manager using modules of the new system

Ensure that you can **retroactively migrate** data back to your system of record
Until your system of record goes live, ensure you're not losing any data when integrating

Consider your **capacity** or **appetite** for parallel migrations / trainings
It's not just data or software: if your team needs additional training as well

Practical things to consider when migrating

DO: Reconcile **access to systems**, 2FA / multi-factor auth for easy hand-over

DO: Clarify where data may be **duplicated**, which sources are more **truthful**

DO: Fix up anything **hand-made** (spreadsheets, sign in sheets) / inconsistencies

DON'T: Attempt to migrate every single **nook-and-cranny** of data

DON'T: Try to **clean up your data** before starting / considering a migration **(!)**

Hot Topic: Cleaning your data?

The first priority during conversion is **1-1 parity** or **mirroring** your current system

The process exposes systematic holes / deficiencies that you may not be aware of

Clean-up should be a **post-migration** item, not a pre-migration item

The vendor or your team should be equipped to do sweeping, rule-based fixes

However, consider **your staff appetite** for clean-up and its timing

If there's more energy & buy-in for the project from the get-go, tap into that

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Questions to ask your vendor / consultant

How do you know that you are **doing things correctly**?
Comparing the same report from one system to another, spot-checks, sample profiles

What **assumptions** will you make, and how are they **documented**?
Many judgement calls will be made on both sides, how can they be communicated?

What do you **need from us** to make this project a success?
From concrete things like logins, spreadsheets, to abstract things like plans, attitude

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Common migration **pain points**

PROBLEM STATEMENT	SIGNS TO LOOK FOR	HOW TO ADDRESS IT
SCOPE CREEP	COST OVERRUNS, ADDING EXTRA WORK, NO END IN SIGHT	HIT STOP: MEET WITH THE FULL TEAM AND RECALIBRATE SCOPE
MANAGING OTHERS	NO ONE TAKES RESPONSIBILITIES, THERE'S NAGGING, RESENTMENT	CLEAR EXPECTATIONS, GENTLE REMINDERS, PULL IN BOSS
MAKING DECISIONS	CONSTANTLY REVISTING, UNCLEAR WHO MAKES DECISIONS	DECIDE DECISION MAKING PROCESS, DOCUMENT THINKING

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PROBLEM STATEMENT	SIGNS TO LOOK FOR	HOW TO ADDRESS IT
MEETING DEADLINES	RUNNING MORE THAN 2 WEEKS BEHIND, TIMELINE IS A FANTASY	REALISTIC TIMELINES, USE TASK MANAGEMENT, TRANSPARENCY
USER ADOPTION OF PLATFORM	SECRET SPREADSHEETS, COMPLAINTS, ROSE-TINTED VIEW	BE OPEN TO FEEDBACK, LET END USERS MAKE DECISIONS = BUY IN
???	WHAT SIGNS HAVE YOU NOTICED THAT THINGS WEREN'T GOOD?	HOW DID YOU RESOLVE THIS ISSUE FOR YOUR ORG?

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