

# Dollars & Sense

## ABOUT THE AUTHOR...

### SALLY FUNK

With more than 20 years experience in development, Sally has served in nonprofit organizations large and small, including campus ministries, private schools and missions organizations. Sally was responsible for donor communications with Campus Crusade for Christ's development office, as well as with Bible Literature International and International Students, Inc. She also held positions in development for the Hesikell School and Evangelical Christian Academy in Colorado Springs. Her broad range of experience includes work with foundations, direct mail, partner program management, and the development of information systems and structures for effective development management. Sally lives in Colorado Springs.

That new donor software looked like it would solve several problems and increase productivity. Sure, it was expensive and took too long to get up and running. So why doesn't it work as well as the old stuff did? Was the conversion worth it?

## Failing Gloriously

### *Avoiding the traps that cause donor software conversions to fail*

by Sally Funk



What went wrong? Converting to a new donor software was painful, costly, and ultimately less satisfying than expected. Are you doomed to repeat this process, or can you learn from other's mistakes?

### Wandering In the Wilderness

"We bought this software because it had a number of features we needed, but now that it's installed, we can't access those features," the development director complained. The IT manager replied, "If we had known you needed those options when we were installing it, it could have been set up that way."

From scenarios like this to situations where new donor management software eventually has to be replaced with yet another software package, the real difficulty comes from inadequate planning.

Converting from one donor software program to another is much like moving: you pack everything up, move it from the old place to the new, and then unpack and put things away in the new location. Just like a move, the better your plan, the fewer the headaches incurred. Making sure the whole team becomes involved in the plan also helps.

*If you don't know where you're going, any road will do – make a plan instead.*

- Put a team together that includes both development and IT.
- Define your outcomes (how will we know when we're done?).
- What will need to be done before moving the data?
- What will be needed during the transfer process itself?

- What will need to be done afterwards to ensure a successful conversion?
- Do you have coding and configuration strategies worked out?
- What customization needs to be built in?
- How will you test the accuracy of the transfer?

Make a list of the tasks for each stage and assign each task to a member of the team with a specific due date.

### The Wrong Stuff

One organization I worked with recently relied heavily on continuing monthly support, but their new software didn't track pledges very well. It didn't support splitting gifts into multiple funds. It did track family information well, but it lacked the space for complicated international or organization addresses.

"So how did you decide on buying this software?" I asked my usual question, hoping there had been a formal process of investigation.

"Well, a cousin of one of our board members has a friend whose church was using it, and we were able to get a good discount..."

Good fit matters in donor software. Different software packages have different approaches to donor management and are designed to handle specific needs. This makes them strong in some areas and weak in others. What's suitable for a large international relief agency is probably not going to work well for a local Christian high school.

*Get the right stuff—know exactly what you need.*

Know your donors. Know your strategies. What do you need to track regularly? What functions of your current software must be available in

any new software? What problems need to be solved? Work out a shopping list of functions and features you need and rank them by importance. Compare possible software packages to your needs. Ask questions. Get references.

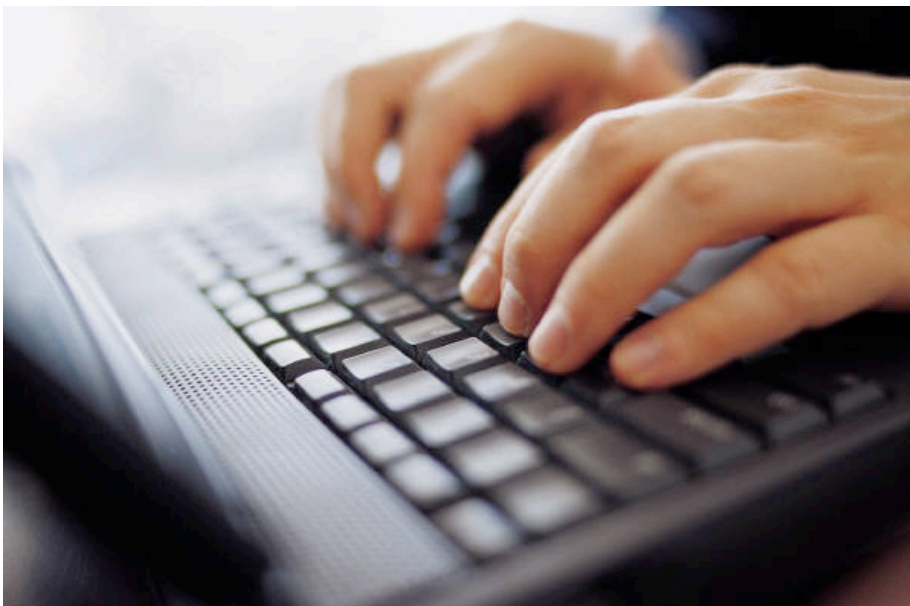
### Old Wineskins

"We spent all this time and money on new software, and we still can't pull a simple mailing list!" fumed the development officer. Turns out, the real problem wasn't the old software, but the state of their data. Spouse names were included in the first name field, or in the spouse field, or just in "notes". Marital status could be found in three different fields. Addresses were incomplete, incorrect and sometimes missing altogether. They had simply moved a myriad of old problems to their expensive new system.

The REAL purpose of any database is not the storage of data. Rather it is the output of information. Yet even the most expensive, feature-filled, customized software can be made useless by poor quality data.

*Save the headaches — clean up the data first.*

Moving clean data to your new system gives you a fresh new start all around. It might even save you the cost of new software. Decide how you want your data to look on reports and communications. Determine what's best to leave behind. You'll at least have a better understanding of



the structure of your database and how you can increase the functionality of your new system.

### Alligator Wrestling

Software conversion is dependent upon matching data in your existing software to the appropriate fields in the new package. In the midst of this data mapping process, someone asks, “Hey, we’ve got these two data fields that look a lot alike – shouldn’t we just combine them into one field?” Do you? Don’t you? Will it make a difference?

An old adage observes how easy it is to be so busy fighting alligators that you forget your job was to drain the swamp. Similarly, it is astonishingly easy to get caught up in the details of the data conversion process – to the detriment of the long term use of the software for your organization.

*Drain the swamp – use your plan for guidance.*

This is where the plan is the most helpful. Faced with a question, you can quickly answer, “Yes, that’s one of the things we wanted to fix,” or “No, those two fields just look similar. They’re used for different functions.” In the case of an issue not covered by the plan, just **stop**. Take a deep breath. Then ask, “How will this affect what we want to do next month? At the end of the year? Three years from now?”



### Good Old Days, Bad Old Ways

Common comments in my work with clients include the following: “Oh, but if we do it that way, we won’t be able to do this other process.”

“Why do you do that process? Why not use the new software to automatically produce that output?”

“Who knows? Suzy, who retired two years ago, always did it that way...”

Surprisingly, there is a strong temptation to set up new software to mimic the old software or processes. Worse, some organizations have spent extra effort and funds to force new software to integrate with “legacy” (a.k.a. “obsolete but we don’t want to admit it”) systems. This wastes a great opportu-

nity that comes as a benefit of adopting new software.

*Move forward, not back – use the data conversion process to make needed changes.*

Changing donor software is a large, visible infrastructure change. As such, it provides you with a reason to make any number of other changes that need to be made, even if only tenuously related to the donor software.

### Déjà vu All Over Again

After weeks of painstaking data cleanup, a manager sighed and said, “How did this mess get so bad?” It’s actually pretty simple: a strategy changes, or a new director comes in with new ideas. The gregarious receptionist “fills in” with data entry during a crunch time. A data entry clerk moves away and is replaced. Someone has a clever idea or a “better” way to enter information.

All it takes is a bit of inconsistency, and suddenly the data starts to become, well, random. The less consistent your data, the less functional your new software will become.

*A place for everything and everything in its place – create and use data standards.*

Data standards are nothing more – or less – than a written record of how your organization stores its data. It

includes all the detail decision you made while cleaning up your data, and answers common questions a new data entry person would ask. It should also include the coding strategies or code lists for reference in assigning needed codes. If it needs to be adjusted later on, make the change a team decision so you can be aware of possible unintended consequences.

### **The Worst Money-Saving Decision You'll Ever Make**

“Oh, you can do that? That’s much easier than the way I figured out...”

“I never thought it was important to enter it that way...”

“One code is as good as another, isn’t it?”

When evaluating quotations for software acquisition, the training options always look expensive – and let’s face it, they are. But it’s like deciding to not put oil in your car – save a bit here, pay a lot later on.

*Unlock the full potential of your new software – train EVERYONE involved.*

Train everyone involved how to use the software. Most software providers have a number of training options available. Pick the option that fits the learning style of the people who will use it most, or decide on one person

to be the in-house expert and provide him or her all the in-depth training.

Train everyone in using the data standards. Indoctrinate everyone in “The QZ Ministry Way.” Give everyone a copy, and have an electronic copy available for everyone on the network. Make it part of new employee orientation so people don’t get frustrated comparing it to “how we did it at my old job.”

### **Conclusion**

Adopting new software is an expensive, time-consuming, status-quo-challenging commitment to change. It will take longer and cost more than originally estimated. That said, you can take the time and effort to do it right, or you can spend the extra time, effort, and cost to do it over.

**Need to evaluate your donor management software? Need help choosing the right solution for your organization? Contact Sally Funk to learn how she can help you with this critical process. Contact her, or any other M/J consultant by visiting our website at [mcconkey-johnston.com](http://mcconkey-johnston.com).**