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# 8 Steps For A Successful Nonprofit CRM Transition

[Choosing a CRM](https://www.sumac.com/choosing-fundraising-software-7-things-to-consider/) that best suits your nonprofit’s needs is already hard enough. Nevermind figuring out how to transition from one CRM to another. We’ve together the top 8 steps for a successful nonprofit CRM transition to help ease the process.

## Plan using the RACI framework

The RACI framework is a responsibility assignment matrix that is used to assign roles and tasks during a project or a process. It defines responsibilities so that all deliverables in a project are checked off the list. Using this framework can help nonprofits ensure that everyone involved is on board with the transition.

* + Responsible: This person executes the tasks and provides feedback about how they should be executed. They will be the person that conducts initial research about CRM alternatives, exports the data and prepares the new CRM.
  + Accountable: This person approves and oversees everything the *person responsible* completes. They will sign off on all the work that needs to be done to accomplish the transition. Usually, this is an executive director, general manager or departemental head.
  + Consulted: This person is consulted when their team or organization needs guidance throughout the transition. This person can also be external.
  + Informed: These are the people that should know when tasks are completed. These people are often your front-line fundraisers, your sales team or the people that are directly affected by the change.

**Pro Tip:** Working with a consultant for the new CRM can be really helpful for the technical parts of the transition. The best software companies will have their own implementation department to walk you through every step of the process.

## Set milestones

Setting milestones is a crucial aspect to all forms of project management. It serves as an organization and risk mitigation tool so you can monitor your progress.

For each of the roles mentioned above, set up a deliverables chart with deadlines. Each completed task should lead into the next. If one person is behind, it can throw off the rest of the team.

**Pro Tip:** To minimize the data loss during the transition, plan an export date and an import date (ideally, the same day or the next day). It’s not likely that both can occur on the same day depending on the complexity and volume of data being transitioned. It can definitely happen over a long weekend though. To avoid data loss, inform your CRM users of the date(s). They will have to stop entering data and track all activities for the short period outside the CRM.

## Clean up your accounts and pipeline

[Transitioning to a new CRM](https://www.sumac.com/5-common-nonprofit-crm-implementation-mistakes/) is a great opportunity to clean up the information in your current CRM. Closing old accounts, reassigning responsibilities and ownership, and bringing pipeline sales donors up to date will allow your organization to get a fresh start in the new system.

**Pro Tip:** Improve when you move! This is also your opportunity to review if your workflows and processes should be refined or completely changed. Again, a new CRM means starting fresh with your information and your operations.

## Backup your data

You can never be overly diligent about making sure that your data is not lost or changed during a CRM transition. After you’ve cleaned up your data, back it up in multiple file formats, in multiple places. Ideally, have a backup file of all your information in the format that your current CRM requires. If all goes wrong on with both systems (this guide will prevent that), you have a file you can reupload to your current system.

*Reality check:* the chances of your organization losing all your client information is extremely low but you’re always better safe than sorry!

**Pro Tip:** Keep your old CRM running until you’ve completely transitioned to the new CRM. While your CRM users may not be entering any information into the old system anymore, keep it running for a month as a backup plan!

## Export, import and test

It is highly recommended not to import your data yourself. Working with someone will allow you to stay on track and avoid any setbacks or data import errors. You can use your new CRM’s native import tool or use a third party tool but consulting an expert is *always* better. They’ll be able to tell you how your data needs to be exported and organized (likely in an .csv Excel file) to properly import. This becomes important when you’re importing data that is coss-linked with other fields or if your new CRM’s architecture is different. If you import contacts wrong, any lead or opportunity or account field they are linked to the contact will also import wrong and they won’t get associated together in the new system.

Setting the technical stuff aside (let’s leave it to the experts), continuously testing that your data is linking and doing spot checks is a best practice during a CRM transition.

**Pro Tip:** Something always goes wrong or takes a little longer. This is especially true if you’re doing the [CRM import and export](https://www.sumac.com/the-6-most-annoying-things-about-donor-crm/) yourself. Don’t panic. Plan ahead and just make sure your vendor can walk you through the process or even better, do it for you.

## Establish permissions

Establishing permissions will allow your organization to control who can and can’t do certain actions in your new system. Just like the RACI framework above, not everyone has the same roles and responsibilities.

By managing who has access to what information and who can perform what actions, management can better control the data and data flows. For example, HR only needs access to internal staff and volunteers while Fundraisers only need access to clients and donors.

An Event Coordinator may need access to both volunteers so they can schedule them for the next event and donors so they can invite them to the next event.

Additionally, let’s say all volunteers need to be approved by HR. If that’s the case, you don’t want the Event Coordinator creating new volunteer records in your system. So, you should set up a permission that allows the Event Coordinator to see the volunteers and their contact information, but not create new volunteer records.

**Pro Tip:** Consider the CRM as a project or a process. Using the RACI framework can help determine who is responsible for what actions so you can set up the software permissions accordingly.

## Train users

Naturally, it’s hard to get employees to buy-in 100% if they haven’t seen or used the software yet. The final part of the buy-in process will be when your organization’s front-line users can finally interact with the software.

There are a couple of ways in which you can train your employees. Most vendors will train one or two master users in an organization who are then responsible for training all other users in their organization. In case of turnover, it’s in the organization’s best interest to have multiple “software experts/trainers” on their team. Above that, most CRM vendors have training videos to help.

Depending on how open the vendor is or what’s included in your package, you may request a virtual group training. This is where a consultant or the implementation division of the company can customize a one-on-one training. Always remember that you’re the client (whether you’re a for profit or nonprofit organization) so you have the right to make reasonable requests to help your organization get up and running properly. An awesome support team should definitely be on your CRM requirements list. It’s not just about the features when choosing a CRM; it’s also about the value the vendor brings to the table.

**Pro Tip:** Requesting a demo or a trial period from your chosen vendor is a great way to help convince your team that this is the best alternative for your organization.

## Stay open to feedback

*Why should management ask for feedback?*

Sometimes giving feedback can be complex and intimidating to employees and volunteers. If your organization just invested in a new CRM, employees may feel guilty telling management how they truly feel about it.

Feedback is healthy and will ensure two key things:

* For the organization: their processes continue to improve and run more efficiently.
* For you: a positive, comfortable and productive work environment.

When providing feedback, employees should be encouraged to provide feedback that is specific, timely (ideally before the transition), meaningful (why does what their saying matter), and candid.

**Pro Tip:** Refer below to the key questions you should be asking yourself before transitioning to a new CRM. If employees don’t buy-in from the beginning, the investment and process could be worthless. It’s management’s responsibility to get their team on board from the beginning and communicate how the transition will make their jobs easier in the long-run.

## Are You Ready For A New CRM?

Before jumping into the steps to a successful CRM transition, there are a couple of questions you should be asking yourself as an organization.

### Why are you transitioning CRMs?

This is the most important question. Organizations usually start looking for a CRM because they’ve outgrown the good-old spreadsheet. And others, just aren’t satisfied anymore. It’s important to keep in mind that a fancier software isn’t a great reason to transition to a new CRM unless it meets your *operational needs*. Depending on what those operational needs are, some reasons for changing CRMs could include outgrowing the capacity or capabilities of your current CRM, user-friendliness integrations with other software necessary for your operations, or the vendor doesn’t or cannot support you.

### How will the people affected by the change react?

Another common mistake organizations make is not taking into consideration that the new CRM is only going to be as good as the people using it. Whether your new CRM was well transitioned or not, there’s always a chance that it’s still too time consuming to use, difficult to learn, inflexible, or doesn’t integrate well with the team. When doing your research and comparing alternatives, a criteria that can help overcome this challenge is the system’s ability to automate and manage workflows to reduce the effort of users.

If you absolutely know that the individuals using the new software are not open to change or very flexible employees, you’ll have to consider if a new CRM will truly increase your organization’s efficiency. This is especially true for volunteers using or contributing information to the CRM. Part of retaining your volunteers requires you to keep them fulfilled and comfortable in their working environment. Your employees and volunteers need to buy-in to this transition for it to be successful.

### How does a new CRM affect your annual budget?

One criteria when you’re looking for alternative CRMs is undoubtedly cost. Affordability is by far one of the most important factors that will affect whether an organization chooses one vendor over another. If you’re on the fence about whether the cost is worth it, ask for a demo. As previously mentioned in this article, demos allow you to better understand what you’re getting into and what your employees are getting into.

## Key Takeaways

Whether you’re a small or large organization, there are some common takeaways from this CRM transition guide:

* If your team doesn’t buy-in, your CRM transition will fail
* Use the transition as an opportunity to improve
* Using a consultant or a consultant-like company will help with the technical part of the transition
* You can never be too safe with how often you backup your data