DATABASE CONVERSION SERVICES

Our Database Conversion Services cover a wide range of offerings that add value wherever your organization is in the process of exploring a Constituent Relationship Management (CRM) change. Your CRM is the heartbeat of your fundraising operation – and Campbell & Company can ensure it works for you.

Level 1/Evaluation: 1-2 Months: A conversion is a significant undertaking. Before you proceed, we recommend taking steps to confirm that the organization's needs cannot be met within the current system. We can help **define your system requirements more clearly and provide counsel on how your system does (or does not) accommodate**. If a migration is required, we can recommend which CRMs should be considered based on your requirements.

Level 2/Selection: 2-4 Months: As the selection process continues, we can be your **advisor and advocate in meetings with vendors** – ensuring that your questions are addressed directly and that you come away with a clear understanding of the pros and cons of each option. We will work closely with you to **review the options and assist with the selection process***.

Level 3/Preparation: 3-6 Months: Once a CRM has been selected, we will develop a **road map for the conversion** that clearly articulates what it will take to be up and running in the new system. The road map includes a timeline, a process flow that details the tasks involved, and high-level table mappings, as well as roles and responsibilities of key team members in the process. Many platform vendors recommend converting the data and cleaning it up in the new system, but this can be cumbersome and is often deprioritized after all the work of a conversion. We can assist with data analysis and deduplication of constituents so that the data moving to the new system is as clean as possible.

Level 4/Execution: 4-12 Months: The migration will take significant time from your staff resources. If you need support to ensure it progresses according to timeline, to your specifications, and in line with leading practice, we can **project manage the effort and provide technical support to the vendor** on your behalf. This includes developing detailed mapping tables, migrating and testing the data, setting up values in the system tables, and leading regular check-in calls with the vendor. With this level of support, your organization can be relieved of the responsibility to track all the important details of the migration and focus their attention on other tasks.

*Campbell & Company will only help to think through potential options and will not recommend any CRM systems. For more information about our database conversion services, contact Strategic Information Services Vice President **Michael Furlong** at **michael.furlong@campbellcompany.com** or call **312.896.8915.**