

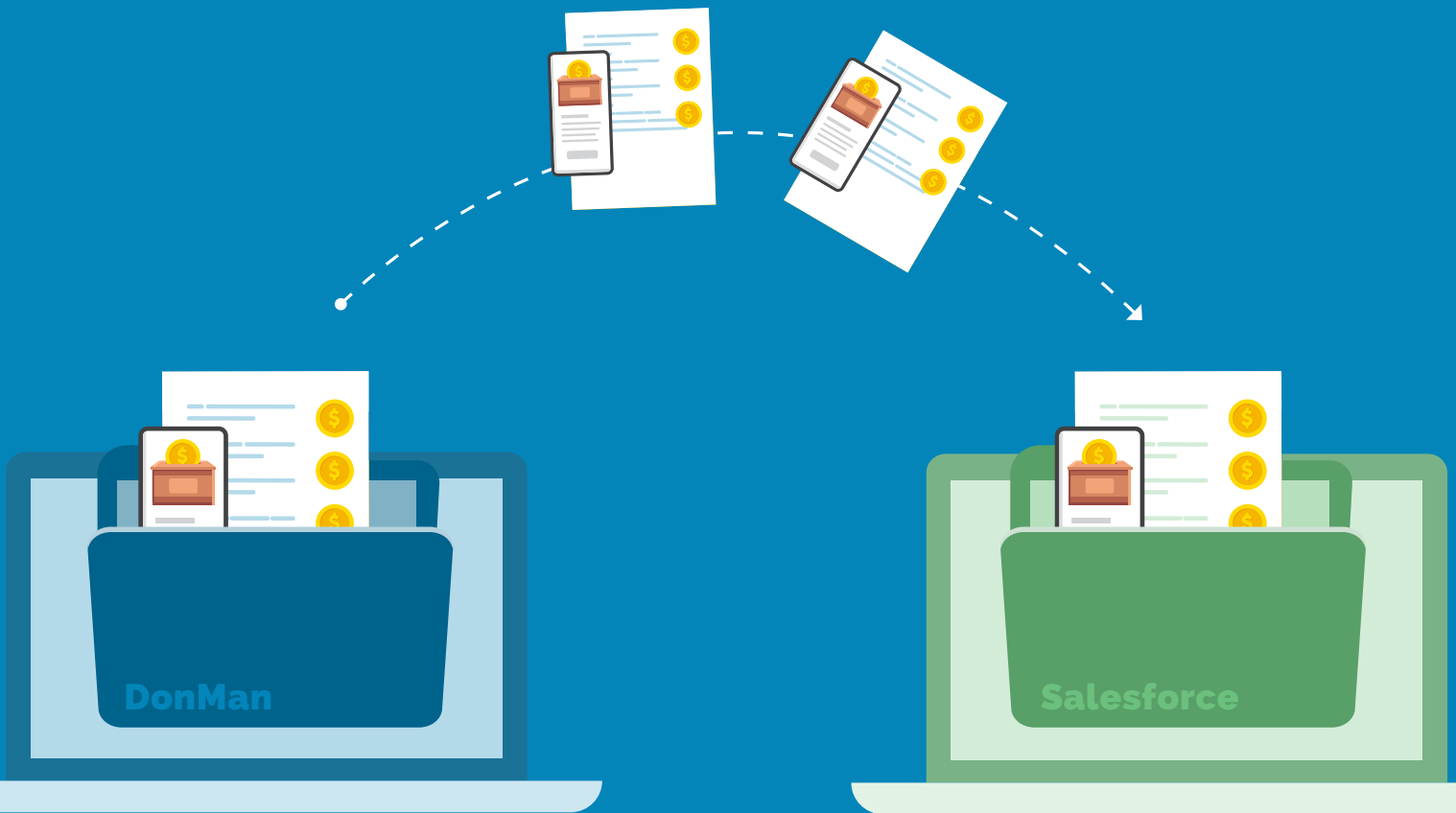


SalesFix



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Migrating from DonMan



For the last 20 years or so, DonMan has been the platform of choice for many smaller charities and not-for-profits. Since DonMan is being retired, many customers are having to migrate to a new solution, iMIS Engagement Management System.

Undertaking a migration can be challenging and many DonMan customers are pausing to consider their options before automatically choosing to migrate to iMIS EMS. In this white paper, we talk about some of the challenges of migration, what to consider when selecting a new solution, and finally, what a Salesforce solution could look like.



DonMan



Migration Challenges

Changing Business Processes

Changing technology platforms is rarely easy: because change is rarely easy! This is especially true if you've been using the same platform for a number of years. You need to think about how you'll embrace a new technology; as well as how you might need to change your business processes. Very often the focus is on the former, whereas actually the latter, changing your business processes, is harder. Much harder.

It is always challenging to think about your business processes outside of a particular technology's constraints. What you think of as a "standard" business process, might not be. There might be a much better way of doing something that you've never considered before. You do what you do because of the technology you're using, not in spite of it.

Here's an example from a DonMan migration project from a few years ago.

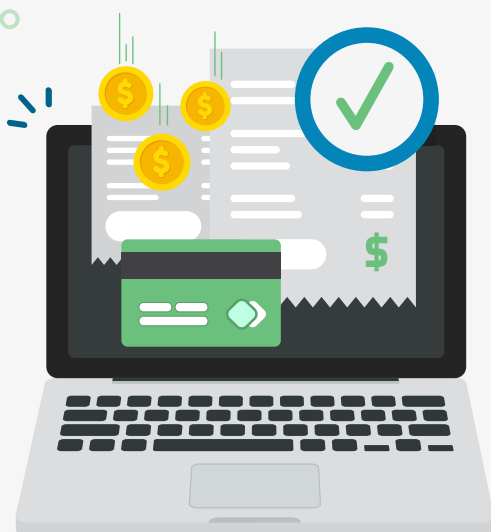
This medium-sized NFP had been using DonMan for over 10 years. They had a fair number of regular donors who were set up to donate either on the 1st of every month

or the 15th. The organisation had established entire business processes around this bi-monthly processing approach, with members of staff responsible for different tasks for 2-3 days each time. One person was responsible for producing the processing file for the payment gateway, another was responsible for checking when payments had failed and needed reprocessing, another made sure the donor's credit card hadn't expired, and so on.

With the implementation of Salesforce, they had the opportunity to think entirely differently about the experience of their regular givers. The solution we were implementing did many things:

- **Automated the nightly processing of credit cards for all regular givers**
- **Automated the re-processing of credit cards that had failed (based on the failure codes received from the payment gateway)**
- **Automated the process of asking regular givers to update their expired credit cards**

The NFP couldn't get their heads around this change in process. The idea of moving from a twice a month processing cycle to a nightly one just blew their minds. They couldn't see the benefit to their organisation, nor to the donors themselves. They were stuck in the mindset of thinking that regular gifts could only be processed twice a month. So stuck that we had to re-engineer their Salesforce solution to deliver the exact same functionality.



Another example would be around donor segmentation. Many of the "legacy" fundraising solutions out there have some sort of concept similar to "constituent codes". Some examples include Raisers Edge and DonMan. The idea here is that in order to segment effectively, each donor must be stamped with a constituent code that encapsulates who they are. A contact can have many constituent codes associated with them so you can figure out who they are and what their relationship is to you: Board Member, Volunteer, Major Donor, etc.

However constituent codes often need to be manually managed, added to donor records, put in a particular order, manually removed when relationships change, and so on. As an organisation grows, managing constituent codes can become a full time job!

What if there was a different way of doing it? What if you could segment donors on the fly, without the need to "stamp" them with an identifier? What if you could automate the identification of donors based on their ever changing donation history, for example?

Yes, when changing technology platforms you absolutely need to think about how your users will get used to navigating a new solution, but more importantly, you need to think about how your processes might change for the better.



Data Migration

The second thing to think about when migrating to a new solution is data migration. Always challenging, especially when migrating donors and their data. Not only do you need to think about the donor's data itself (name, address, phone number, etc), you also need to think about their donation history and their payment details.

Donation Histories

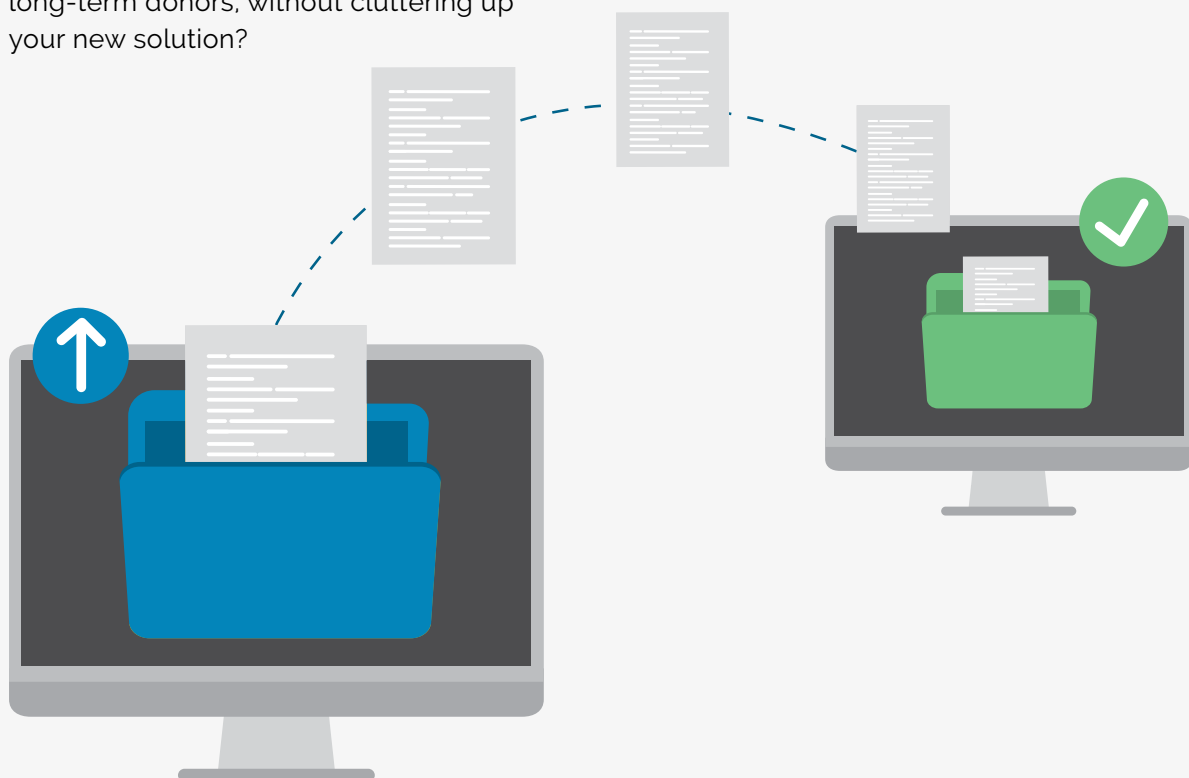
Knowing your donors well is critical to every NFP. Digging around in the historical records can help you identify your next major or gifts in wills donor. You want to keep as much historical data as possible, right? For the most part, yes, but let's take a KonMari approach to data: does your data bring you joy?

Chances are, if your data is more than five years old, it probably isn't going to help you predict anything. So how do you maintain that historical knowledge of your long-term donors, without cluttering up your new solution?

Salesforce provides summary information such as lifetime giving, date of first (and last) donation, and so on at the donor level. This information is, of course, calculated automatically in order to ensure that this information remains true even after a migration. There are multiple ways to do this that should be considered during a data migration.

Payment Details

Regular donors have provided you with their credit card details so that you can take a regular payment from them. These credit cards should be tokenised for PCI reasons. You should not be able to see the full credit card details. Chances are, when you migrate from one solution to another, you'll also be changing payment gateways, so migrating tokenised credit card details from one gateway to another has to be part of your data migration strategy.



Very often, the payment gateway themselves will manage this, and this is the best way to do it. You do NOT want to be handling any credit card data! Your current payment gateway will export the relevant credit card info, pass it to the new payment gateway who will then tokenise the cards and pass the tokenised information to you.

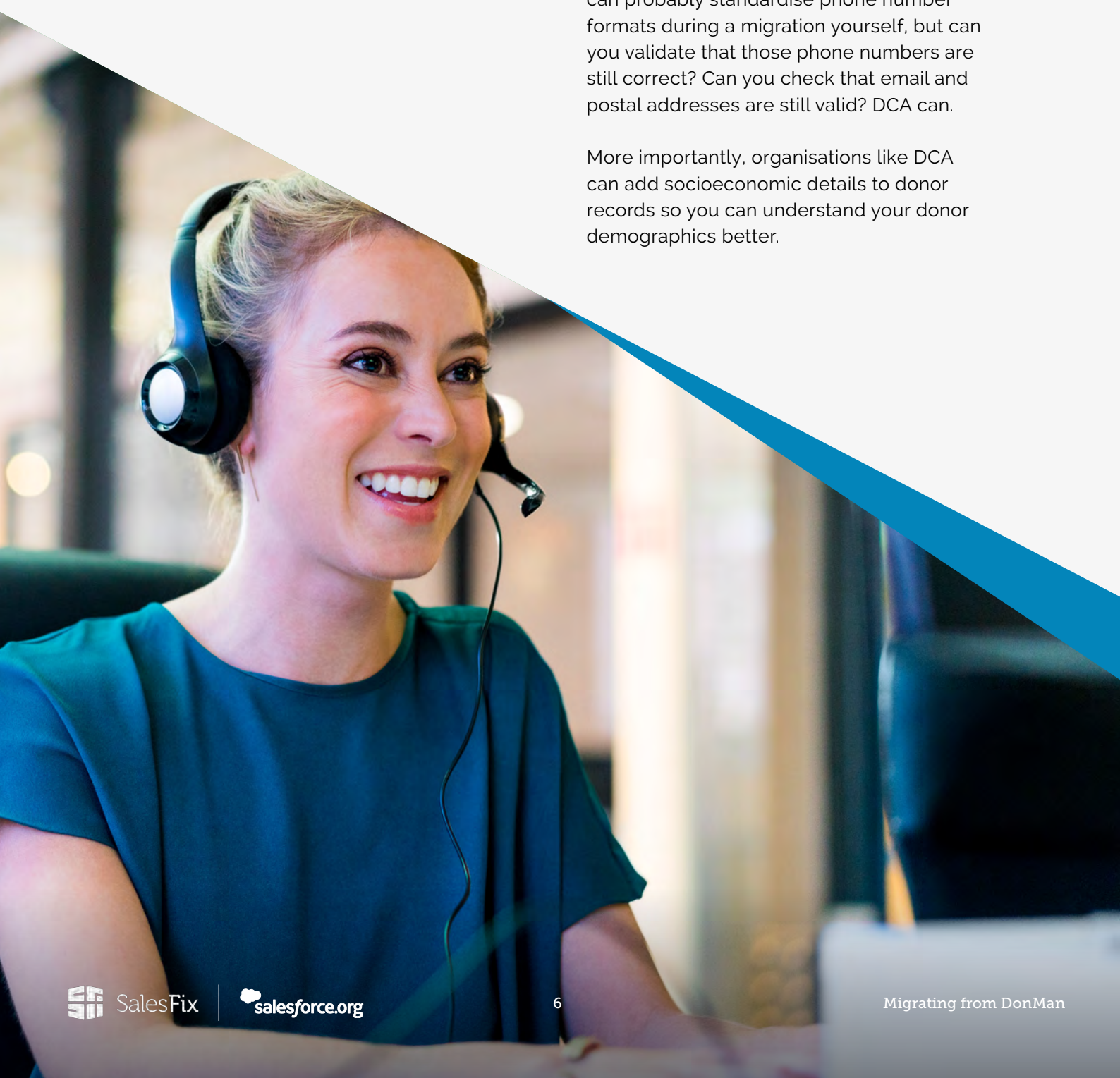
But this isn't always the case, and so you'll need to devise a strategy to deal with the migration.

Donor Details: enhance or simply migrate?

Migrating any data is always an opportunity for a spring clean. The question is, how much of a spring clean? And do you do it yourself, or look to the services of someone else to support you?

Organisations like Data Consultants Australia are data migration experts. Not only can they extract and cleanse your data, they can also enhance and augment your data along the way. You can probably standardise phone number formats during a migration yourself, but can you validate that those phone numbers are still correct? Can you check that email and postal addresses are still valid? DCA can.

More importantly, organisations like DCA can add socioeconomic details to donor records so you can understand your donor demographics better.



What to look for in a new solution

Flexibility is key! As discussed above, embracing a new technology often requires embracing new ways of doing things. New business processes are just one way you might need to embrace change. You should also think about the difference between a solution like DonMan that locked you into a particular technology approach, and a solution like Salesforce that offers flexibility.

Every organisation will have a particular "ethos" when it comes to technology. This might be explicitly stated in a written strategy or policy, or it might be generally understood within the culture of the organisation.

For example, are you the sort of organisation that wants one hand to shake? Do you want to know that EVERYTHING you do is managed by one single solution? Or does that fill you with dread? The idea that you have no flexibility to choose the best of breed solution at that point in time, that you're tied to your solution, unable to change can be a big problem for a lot of organisations.

The COVID-19 pandemic has highlighted the need for flexibility and many organisations locked into particular solutions have found it hard to adjust and respond well. One of the things that people can find challenging about Salesforce is the flexibility and choice it offers. It's like being a vegetarian and being used to having just one, maybe two, choices on a restaurant menu and then going to a vegetarian restaurant and being overwhelmed by choice.



At SalesFix the architectures we put together are specific to your organisation. We consider what you're looking to achieve and design a solution for that. That means there will be choices to make along the way, and some people can find that challenging. But it's what we think makes the Salesforce platform the best in the world.

In 2020, a small NFP came to us and said their donation platform had stopped working overnight. They were struggling to work out what was wrong and couldn't get the support they needed through the provider. They were fed up with being locked into one solution and one provider and wanted an alternative.

In less than two weeks, we set them up with an online fundraising solution ([Raisely](#)) connected to Salesforce using [MoveData](#). Raisely provides that incredible front-end donor experience (for free) and is a platform they can manage themselves. It's easy to spin up a new donation form for specific campaigns, and it handles all of the PCI considerations.

MoveData is a great solution whose purpose is to get data into Salesforce from third-party solutions. A fixed price solution built by a local Australian team, the product is quick to deploy and relatively easy to manage.

This architecture not only got them up and running quickly, it also means they can be flexible in the future. When the world returns to normal, they'll be able to kick-start their face-to-face event fundraising using the Raisely platform without having to worry about changing anything in their architecture. They can also add additional third-party platforms like GoFundMe and JustGiving easily should they want to give their donors options for fundraising in the future.

If you would like to see a demo of how Salesforce might help you with your fundraising, contact Nicole at nicole.aebi-moyo@salesfix.com.au



How can we help?

At SalesFix, we've been working with the Salesforce platform for over ten years. Our staff have implemented Salesforce for around 200 NFPs in that time, delivering systems that support fundraising, service delivery, marketing campaigns, stakeholder engagement and more. We focus on ensuring that the solutions we build are as "invisible" to our clients as possible, allowing you to focus on your job.

Our approach to delivering fundraising solutions is straightforward: keep it simple, avoid code, ensure longevity. We have a number of architectural approaches, each designed to make sure you're able to make choices around the platforms you use. We don't want to reinvent the wheel, or restrict you in any way. We want to give you choices.

If you'd like to talk to us about how we can enable you to be an agile organisation, driving deeper constituent engagement through deeper knowledge and understanding, drop us an email or pick up the phone:

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📍 **Offices in Brisbane and Melbourne**



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