Recipe for Success:
Ingredients in Successful Conversions

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You've bought a new alumni/donor database. The selection process was long and grueling, but the hard part starts now. One of the many steps that come next is the data conversion, in which you try to fit all your old data into your new system.

Advancement staff dread conversions the way most people fear IRS audits. I've heard of fundraisers who changed jobs rather than endure another conversion. But conversions don't have to be tests of character. This article will review the three major steps in a conversion and give you tips for making each a success.

STEP 1: DATA MAPPING

In this step you are trying to translate all the fields in your old system into corresponding fields in the new system. This is a time-consuming process that requires communication among several parties: a staff member who knows your data, technical staff who know the new system, technical staff who know the old system, and the programmer(s) who will do the translating.

What should you do?

Identify someone from your staff who knows your data and assign her to this project. The people who handle data entry or report generation may be your best resources. They will work with technical staff who know the new and old systems, but someone has to know how your data is used and what it should look like.

If you don't have anyone who knows your data, find someone who is familiar with your old system, preferably from a functional perspective. This might be someone from another college or a consultant recommended (or provided) by the vendor of your old system. They won't know the idiosyncrasies of your data, however, so they'll need to ask you lots of questions.

If your only choice is to use technical staff, you must work closely with them. They won't know your data, are unlikely to know a LYBUNT from a non-donor, and might not know what questions to ask.

STEP 2: PROGRAMMING

In this step your old data is massaged to match the format of the new system. The complexity of this step varies tremendously. In the best case, the data comes out of your old system just the way the new system expects it to look. In the worst case, you'll need a lot of technical help.

The problems that you might face in this step include:

- The new system can store all of the data that was in your old system (this is rarely the case, but let's fantasize). But some fields are too short. What do you do with the last five characters of long addresses?
- You don't have a (good enough) programmer on staff and can't afford (or find) anyone else.
- The programmer hasn't done this type of work and doesn't anticipate the hazards.
- The documentation for the new system is so bad that no outsider can figure out how the data is organized.
- The new system requires the use of special tools that only the software vendor has access to.
- The programmer doesn't ask enough questions.

What should you do?

A do-it-yourself approach at this step can get you into trouble. And accepting a cut-rate bid from a hired gun will frequently backfire. If you bought a simple system, any programmer (and perhaps a talented amateur) might be able to program the conversion. But if your new system is complicated, the programming is probably equally complex. Be prepared to invest in programming.

In most cases the vendor who wrote your new system has a huge advantage. The vendor knows how the new system stores and organizes data. And some systems are so complicated and/or so poorly documented that only an insider can figure them out. But, the vendor is probably the most expensive option, and isn't always the best. Some vendors routinely fail to meet their conversion schedules. Some vendors simply don't do conversions.

What to do? If you didn't ask about conversions when you checked references on the vendor, locate its user group and start asking. If someone wasn't happy, investigate. Was it vendor's fault? If so, was it symptomatic or an isolated problem?

If you decide to look elsewhere for programming help, try to find a consultant, or a programmer from another college, with experience handling conversions to your new system. Some software vendors are happy to recommend other options. If they're not, try asking through their user group.

STEP 3: TESTING

Now you're ready to make sure the first two steps were done properly. Do the dollars add up? Are the dates backwards? Are all your donors now coded "deceased"? Are alumni couples still

linked? Remember, of course, that any garbage from the old system is still garbage in the new system. Data cleanup is another project altogether.

What should you do?

Involve everyone. The programmers should have been testing all along. Now the people who did the mapping should look at sample screens and reports. So should fundraisers, alumni officers, data entry staff, and receptionists — anyone who know your constituents. Look up your own record and anyone else's whose information you're familiar with. Run the same reports on the old and new systems and compare the results. If something looks wrong, ask lots of questions, get problems fixed, and test again.