



HOW TO CONNECT YOUR FUNDRAISING SYSTEMS

PROBLEM

Most organizations rely on multiple fundraising systems to run their program. That's tons of points of data entry, multiple data transfers, and additional data maintenance processes.

SOLUTION

The 10 steps listed out in this document provide a roadmap to outlining and managing a fundraising system integration.

Simply, remember to:

- Take a Deep Breath
- Make a Data Map
- List the Details
- Develop an Audit

RESULTS

A well-planned integration will enhance your fundraising efforts, streamline operations, and provide better insights into donor behavior.

Following these steps will ensure a successful implementation that aligns with your organizational goals.




1

DEFINE OBJECTIVES

- Identify Goals: What do you want to achieve? (e.g., streamlined reporting, improved donor insights)
- Stakeholder Input: Gather requirements from team members (e.g., fundraising, finance, IT).

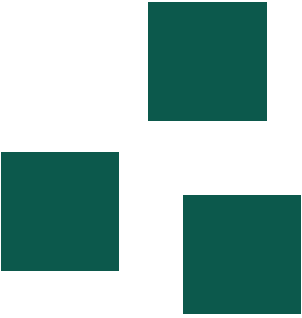
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ASSESS CURRENT SYSTEMS

- Inventory Existing Tools: List all current systems (CRM, email marketing, donation platforms).
 - Data Structure Analysis: Understand data formats, fields, and workflows in each system.
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IDENTIFY DATA

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- Key Data Points: Determine which data fields are essential for integration (e.g., donor information, transaction records).
 - Frequency of Updates: Decide how often data needs to sync (real-time, daily, weekly).

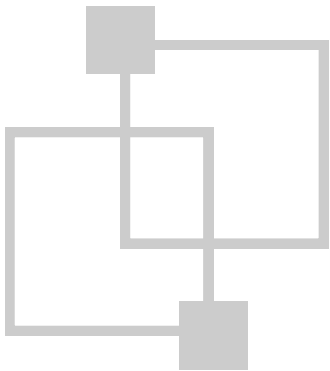
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CHOOSE METHODS

- APIs vs. Manual Imports: Assess whether to use software/APIs or manual data imports based on resources and technical capabilities.
- Integration Tools: Explore third-party tools (e.g. Omatic Software) or custom solutions.

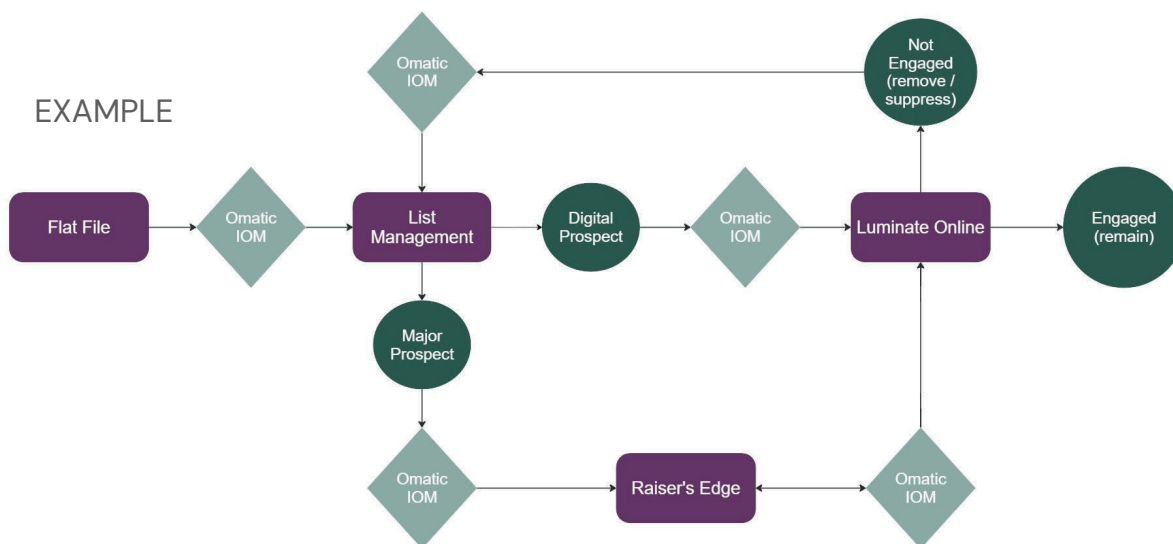
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DEVELOP DATA MAP



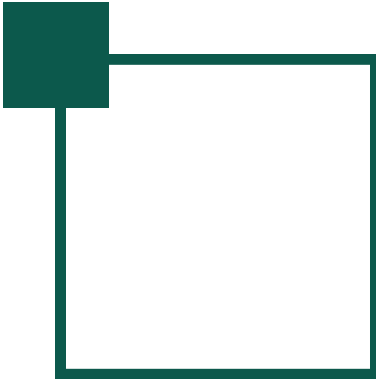
- Field Matching: Create a mapping document to show how fields in one system correspond to fields in another.
- Transformation Rules: Define any data transformations needed (e.g., date formats, data cleaning).

EXAMPLE



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ESTABLISH SECURITY



- Data Privacy Compliance: Ensure integration complies with relevant laws (e.g. GDPR).
- Access Controls: Set permissions for who can access or manipulate integrated data.

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CREATE A TESTING PLAN

- Test Scenarios: Develop scenarios to validate the integration process.
- Pilot Testing: Run a full test with a small dataset to identify issues before full-scale launch.

Develop a testing plan
and prepare test files

Execute testing
scenarios and validate
old vs. new data

Ask end users to
test small data sets,
then conduct high
volume testing

Gather feedback and
make adjustments

Launch and monitor

8

IMPLEMENTATION & MONITORING

- Rollout Plan: Develop a step-by-step rollout schedule.
- Ongoing Monitoring: Set up regular checks to ensure data integrity and address any issues promptly.



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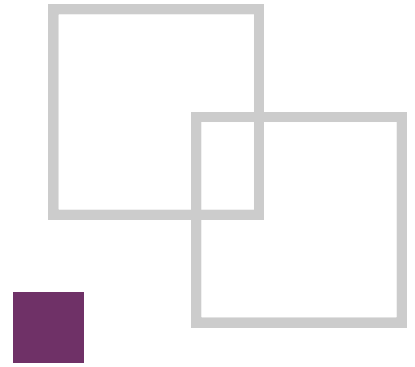
TRAINING & DOCUMENTATION

- User Training: Conduct training sessions for staff on the new integrated system.
- Documentation: Create comprehensive documentation for future reference and onboarding.

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EVALUATE & OPTIMIZE

- Review Performance: Regularly assess the integration's effectiveness against your objectives.
- Continuous Improvement: Be open to making adjustments based on feedback and evolving needs.



NEXT STEPS

A well-planned integration will enhance your fundraising efforts, streamline operations, and provide better insights into donor behavior. Following these steps will ensure a successful implementation that aligns with your organizational goals.

And remember:

- Take a Deep Breath
- Make a Data Map
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DEVELOPMENT
DATA DISCOVERY