

10 Steps to Successfully Implementing Raiser's Edge®

In order to ensure the most efficient and effective implementation of your Raiser's Edge software, this important project can be organized into the following ten steps. Each step focuses on one of two complementary aspects: the information recorded in your new fundraising system (database content) or the use of that information (staff processes).

	Path A: Staff Processes	Path B: Database Content	Objectives Achieved
1	Envision goals and workflow: <ul style="list-style-type: none"> Assess projected use of the fundraising software What would you want in a year? (Reports, processes, training) 		Bring development, finance and IT players together to identify problems, must-haves and wish list items. Then bring on the project manager for the conversion. Define what a successful conversion would look like from various perspectives. Outline preliminary timeline.
2	Participate in formal software training. Establish network infrastructure.	Assess current database: <ul style="list-style-type: none"> Where are we now? (Reports, fields, processes) Perform obvious pre-conversion cleanup 	Further staff, network and data readiness.
3		Conduct test conversion	Test the conversion process, data readiness, and initial assumptions.
4	Establish key components in test system: <ul style="list-style-type: none"> Constituent Entry & Coding Gift Entry & Acknowledgment Effective Reporting 		Test the mission-critical business functions. Determine best practices. Develop workflow diagrams and process documentation. Gain hands-on experience with the system.
5		Analyze results of test conversion. What do you need to clean up: <ul style="list-style-type: none"> Before the live conversion? During the conversion process? After the conversion? 	Ensure the accuracy of the data conversion.

	Path A: Staff Processes	Path B: Database Content	Objectives Achieved
6	Test new processes and components		Test newly-identified business functions. Expand hands-on experience with the software.
7	Conduct process training		Consolidate and enhance formal and hands-on training with small-group training sessions tailored for specific teams of users (e.g., directors, managers, gift processors, administrative assistants).
8		Live conversion	Convert data!
9		Confirm data and streamline database	Ensure the accuracy of the data conversion. Establish user-security. Input new codes. Conduct priority, post-conversion cleanup projects in system.
10	Implement new workflow plan and processes		Go live on a fully-functional system!

Let us help you successfully implement Raiser's Edge

Through our experience at over 600 organizations across the nation, we've developed a clear, sound process for helping non-profits implement the Raiser's Edge software. Our services include data conversions, establishing code structures and field usage, process design and documentation, query and report setup, and training. For our clients with advanced needs, we can develop Crystal Reports, integrate with other databases and perform custom programming. These services provide our clients a solid foundation for effective use of this powerful fundraising tool. Contact us today to find out how we can help you!

For more information:

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