

NONPROFIT SOFTWARE MIGRATION CHECKLIST

Migration, conversion, and implementation - these terms are all used to describe the process of moving into a new piece of nonprofit technology. Moving into your new system is just like any other move. There are people to manage, lots of tasks, and tons of details to keep track of. Phew! Use this handy checklist and you'll be on track for a smooth project.

1

WRITE UP A MIGRATION PLAN

Think about this as your moving plan. Be sure you know identify your goals, budget, and timeline. What's most important to keep in mind as you roll along? What's critical for the success of the project?

2

INVENTORY YOUR ASSETS

You probably have a lot of forms, templates, and unused stuff in there. Decide which items are coming with you, and which ones can be discarded. Open a spreadsheet and start building your packing list.

3

CLEAN UP YOUR DATA

Everybody has messy data- and now it's really time to deal with it. Make a list of every data source and assign someone (or just yourself) to dedup, merge, and purge. Get the data shiny and ready for import.

4

THINK ABOUT REPORTING

How will your new system help you track progress toward your goals? Avoid assumptions and start discussing your report needs. Having a sense of what you'll need will help with configuration and training.

5

ASSIGN ROLES & RESPONSIBILITIES

This is a biggie. Who is on the project team? What, specifically, is each person responsible for? Set the team up for success by holding a kick off meeting and going through the project work in detail.



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