Start Strong: 10 Steps to DonorView Transition Success

A. **Welcome** to our introductory video "Start Strong: 10 Steps to DonorView Transition Success." In this video we will cover the 10 basic steps to help you incorporate the DonorView software into your organization's processes. The ten steps include:

- Step 1 - Understand the structure and terminology of DonorView
- Step 2 - Engage your team in the process
- Step 3 - Define your workflows
- Step 4 – Complete your forms and page setup questionnaires promptly
- Step 5 – Prepare your data for conversion
- Step 6 – Rigorously review your converted data and pages
- Step 7 – Perform Verification of DNS Settings
- Step 8 – Prioritize training
- Step 9 – Configure and customize thoughtfully
- Step 10 – Create simple standard operating procedures

Organizations who embrace these ten steps have an easier time transitioning to the new software and are up and running sooner than those who do not. Ok, let us dive into our content and take a look at the software.

B. Step 1 – Understand the structure and terminology of DonorView

1. Modules, Dashboards, Grids and Pages
    a. The software is organized into modules for the different activities.
    b. Each module is a specific kind of activity, like managing memberships or events.
    c. Each module has a dashboard giving you a snapshot of a few key indicators.
    d. Within each module there is a sub-menu to access the various reporting grids and tools used to build your pages, emails, letters, and invoices.
    e. A "grid" is how the data is displayed. It looks like a spreadsheet, for example, on the Memberships grid we see the data related to all of the membership transactions.
    f. The views displayed on your grid can be customized to filter for specific sub-sets of your data, for example to see a list of members who will be expiring this month.
    g. We use the word "pages" to describe how to software generates an online form to be used for registrations, donations, and information collection like membership applications. There must be a page created to accept any registrations or payments.
    h. Each page you create in the software has its own unique URL and QR code that you can share by adding it to your website, on social media or via links you send out in emails or texts.
    i. Information completed on these forms is automatically uploaded to your database and your grids will be updated with the new information as it happens.
    j. A key feature is that the software uses email and name to link to existing records to maintain transaction history for each constituent.
    k. Be sure to review the Module Guides and Glossary of Terms to get more familiar with the functions of the software and the terminology used.

2. What is a constituent?
    a. One key term we use is "constituent." A constituent is any contact in your database, which includes people and organizations.
        - People are labeled as "individual constituents."
        - Organizations, groups, businesses, churches, foundations, government agencies, etc. are labeled as "company constituents."
        - Each of these types of constituents is their own record.
    b. Constituents can be donors, members, sponsors, granting agencies, event attendees, email list subscribers, volunteers, and any other person or organization you wish to track in the database. Think of constituents very broadly, it is your entire universe of contacts.
3. What is a member?
    a. If your organization offers memberships, members are a specific subset of constituents. All members are constituents, but not all constituents have to be members.
    b. You may have people who make donations or attend your events who are not members, but when they make a donation or register for your event, they will become a constituent in your database. That way you can continue to build your relationship with that constituent and expand your organization's sphere of influence.
    c. In order to be considered a member, the constituent must have a membership transaction related to their record.
        - Memberships can be single or group memberships.
        - So, an individual can purchase/receive the membership themselves, or they can be members as part of a group membership that another individual or company purchases.
        - Companies can also own memberships, and they can also be part of larger group memberships.
        - Your implementation manager will help you determine the best types and setup for your organization's membership structure.
4. Companies versus Individuals
    a. Data collected for individual and company records is different.
    b. Individual constituents have fields like first name, title, and birthdate.
    c. On the individual's record, you will see the name of the company to which they are connected in the Company field.
    d. Company constituent records have fields like industry, number of employees, and EIN number.
    e. Companies and individuals can be connected via an employer-employee relationship.
    f. On the Company record you will see a list of Company Contacts, which is all employees related to that company.
    g. On the individual's record, you will see the name of the company to which they are connected.
    h. An important distinction is that the list of Company Contacts is not a list of members, these are strictly employees. To see membership information and any constituents that are part of this company's group membership, you should look at the Membership tab.

5. Last Name/Constituent
    a. On the grids, the Last Name/Constituent field will display either the last name of an individual or the name of the company record. This field is used interchangeably for both types of records.
    b. The column Profile Type will tell you what kind of record this is, whether that is a company or individual record.
    c. The column labeled "Company" will only display information for Individual types of profile records. It shows the name of the Company record that individual is related to. Think of it as "employer."
6. Stay tuned for video #2 in this initial training series called "Mastering the Basics" which goes into more depth about how to get started using the software.

C. Step 2 – Engage your team in the process

1. Engaging your team in the process will ease everyone's transition so we recommend including the team members who will be using the database in the implementation process.
2. We do recommend identifying one person as the primary contact and what we call the "database manager."
    a. The database manager will be responsible for coordinating all the customization requests, setting up your procedures, and being the main point of contact for scheduling with the DonorView team.
    b. The database manager is usually also the person responsible for adding new users and assigning their security settings.
3. The Welcome Video available in the support video library is a great place for everyone to start. It is only 15 minutes long and highlights all the features available. It is a terrific piece to share with stakeholders, like your board of directors, who would like to know more about the software but will not be using it day to day.

D. Step 3 – Define your workflows

1. A workflow is a list of steps that typically do to accomplish a task, like entering a new donation or sending thank you letters.
2. List or map your workflows and identify those daily, weekly, monthly, quarterly and annual tasks that need to be completed using the software.
3. This helps you to prioritize what needs to be learned first and helps your conversations with your implementation manager so that your donation pages, events, and other activities are set up according to your needs.

E. Step 4 – Complete your forms and page setup questionnaires promptly

1. Your implementation manager will provide you forms to complete for things like setting up users who will have access to the database. You can also establish the security settings for each user.
2. You will also receive fill-in questionnaires for your donation, event and membership pages (as applicable). Please review and complete these promptly.
3. The questionnaires help the implementation team efficiently set up your pages and allow you to specify things like wording, ticket prices, attendee questions, donation options, membership pricing and expiration dates, and branding on your pages.

4. Membership pages are required to import membership data, so this information is especially critical in the data conversion process if your organization has memberships.
5. If you are unclear about something on the questionnaire, reach out to your implementation manager for guidance.

F. Step 5 – Prepare your data for conversion

1. You will want to review this article "Tips for Data Conversion" to help you prepare your data for conversion. We also have articles "Constituent Grid Data Fields" and "Gifts Grid Data Fields" which explain what each field means and what type of data is contained in that field.
2. If you need custom fields for special data that is not standard, let your implementation manager know and those fields can be added to your profile records.
3. Remember that each individual and company will have their own constituent record and count in your total number of constituents. So, if you have 100 company records and each of them has an individual company contact, that will count as 200 records.
4. Be sure to spend time cleaning your data by merging duplicates and removing any records that you do not wish to have imported into the new database. Examples of data you may not wish to import include old data, data from deceased constituents, or data without contact information like a name and address or email.
5. Each constituent record should be assigned a unique ID, either provided by you or the software will generate a new ID when it is imported.

G. Step 6 – Rigorously review your converted data and pages

1. Once your implementation manager completes mapping your data and creating your pages it will be sent back to you for review and approval.
2. Spend time reviewing your data and pages ensuring all the data is in its proper place and it is what you expected to see – be sure to contact your implementation manager with any issues so they can be corrected as needed.
3. Ask another team member to review with fresh eyes to ensure everything is ready to be imported
4. Once the data is approved and imported you will have the opportunity for a data reviews session with your implementation manager so that you can see exactly how it looks in the software and where to access different information.

H. Step 7 – Perform Verification of DNS Settings

1. When sending emails from DonorView, you must use emails associated with your organization's domain name, like "yourname@yournonprofit.org"
2. You will need to update your domain's Domain Name System (DNS) settings so that recipient email servers know it is your organization. This article explains how.
3. DonorView will then be "authorized" to send emails on behalf of your organization.
4. Public email address like Gmail, Hotmail, Yahoo, and Outlook.com cannot be verified. Sending emails from these addresses will result in poor email deliverability.
5. You will receive instructions via email from the support team on performing this update and the team is available to assist as needed.

6. The step is extremely important! Skipping this step will drastically increase the likelihood of your emails going to spam.
7. Be sure to notify the support team when you are complete so they can update your account.

I. Step 8 – Prioritize training

1. Training can start anytime; You do not have to wait until your data is converted.
2. It's best to start training as soon as you are ready to start using the software.
3. You have several options to learn how to use the software and we will be sending a video soon about all these options.
4. All users have access to the Support Videos and Articles Libraries. You can find the link under your user initials in the top right corner when you log into the software.
5. It is especially important to set aside time for training. Like any complex tool or activity, it takes time to learn all the features and become proficient.
6. Think of it like learning to drive a car, you learned the rules of the road and how to operate the vehicle, but it took time to become a good driver.

J. Step 9 – Configure and customize thoughtfully

1. Throughout the software there are many user-defined fields and dropdown lists.
2. You can customize these to help with tracking information, segmenting your lists, and reporting.
3. However, it is important to use these fields consistently. For example, the For-Fund-Event-Appeal fields on a transaction are used to categorize revenue sources and link to QuickBooks.
4. Ensuring all entries are assigned to the correct options and adding new options with forethought will prevent issues down the road.
5. This is where it helps to have a designated database manager to coordinate the updates for these fields so that you can use them consistently to have the best results.

K. Step 10 – Create simple SOPs

1. SOPS are standard operating procedures.
2. DonorView is used by thousands of organizations, and each one does things just a bit differently.
3. We provide guidance on the options to set up a form and what the purpose of each field is to get the desired results, but you will want to ensure you document the steps you expect your users to take when performing routine tasks.
    a. This can be a simple as a checklist indicating, for example, whenever a new individual record is entered, you expect your team to also provide assign them to a constituent category and email list.
    b. You can even request that certain fields be made "required" so that needed steps are not skipped.
4. Taking the time to create a few simple SOPs will help current and future team members enter data as you intended and will ensure your reports correctly reflect the information you need.

L. Support is Available

1. We realize that DonorView is a powerful software and may be much more robust than anything you have ever used before. That can feel overwhelming, especially to a small team.
2. Remember to focus on one aspect at time, first learning the basics of how to navigate and enter data. Then learning how to create reports and communicate with your constituents. Then adding to your skills by doing more advanced things like creating automated actions or tracking deliverables for sponsorships.
3. Everything does not need to be learned on day one.
4. And while there are a lot of self-service resources available for you, sometimes you have a unique situation or are unsure how to proceed. And that is where the support team can assist. Anyone on your team can send a support ticket anytime to support@donorview.com to get help.
5. We want you to be successful and be able to serve your constituents and do more using this software. So please take advantage of this service when needed.

M. So, to recap, our 10 steps include:

- Step 1 - Understand the structure and terminology of DonorView
- Step 2 - Engage your team in the process
- Step 3 - Define your workflows
- Step 4 – Complete your forms and page setup questionnaires promptly
- Step 5 – Prepare your data for conversion
- Step 6 – Rigorously review your converted data and pages
- Step 7 – Perform Verification of DNS Settings
- Step 8 – Prioritize training
- Step 9 – Configure and customize thoughtfully
- Step 10 – Create simple standard operating procedures

These ten steps help you efficiently and effectively manage your transition to the DonorView software.

1. Stay tuned for our next video where we take a closer look at Mastering the Basics. This will cover the essential features and activities you will need to learn in order to confidently navigate and use the CRM in your day-to-day work.
2. The third and final video in this series is called "Next Steps: DonorView Training & Support Options." It will present all the training opportunities available as well as explain the support plan tiers and what is included.
3. Thank you for watching and if you questions about the implementation and conversion process, please reach out to implementation@donorview.com. For general questions about the software, support@donorview.com is where you can send any questions or issues.