

<u>Organization Name</u>	<u>Total Unique Records Converted</u>	<u>Original CRM</u>	<u>New CRM</u>	<u>Months from Contract Signing to Go-Live</u>	<u>Design & Implementation</u>	<u>Testing & Training</u>	<u>Comments</u>
St. Norbert College	98,000	Ellucian Banner	RE NXT	10	6	4	Original database had about 12% of dupes to merge but we handled that pre-implementation. Then had another 3% that need to be handled after implementation that were not caught originally.
Kennesaw State University	169,616	RE 7	RE NXT	7	5	4	RE ==> RENXT is mostly a literal move of data from on-prem to hosted, so the backend requirements were not as significant as would be needed for a change in products. That being said, it was a good opportunity to shore up business processes, clean up data, and solidify training to ensure our future effectiveness. We "went live" Sept. 18, 2020, so we are still fresh on the heels of migration. Something consistent I have seen from both KSU and GT is that post-migration, there is a second phase of the project involving a reporting audit to re-build, scrap, and/or re-define reports and dashboards. We are just getting started on this part of the project.
Syracuse University	650,000	AW (18 years)	BB CRM	26	14	12	Several large data cleanup projects were completed in Revenue, Planned Giving and Athletics prior to Go-Live. Management was pushing for go-live after 20 months but the Operations Team convinced them of the need for extra testing and implementation, and extended it six additional months. Thankfully. Testing and <i>initial</i> Training took two months. 24 months out, we still write and refine procedural documents every month, and will touch base every few months with staff to see if they need any refreshers. We began evaluating the conversion in July 2017, signed the contract in July 2018, and went live in December 2018. It took 5 months from contract to live, but that was after 12 months of evaluation. It's helpful to involve your CFO from the beginning of this process, particularly so you don't end up with a multi-year contract filled with a) things you only need in year one (i.e. extensive, time-intensive training modules), and b) new/experimental modules that are not useful/essential for the database (i.e. a barebones peer-to-peer fundraising software). Even with testing, it's important to scenario plan for plug-ins breaking and customizations needing to be rewritten. Like for example, we had an extra month after Go-Live of troubleshooting our call center integration, where we had to keep our old environment live for the call center while Blackbaud figured out the problem in NXT, then we imported actions and pledges into the new system every morning.
Flagler College	55,000	RE 7	RE NXT	5	1	2	Converted from extremely customized instance of CX that was shared between 5 institutions and student billing/registration; conversion was bumpy with an extra 1.5 test runs added to the schedule mid-implementation; Reporting still not fully up and running (went live July 2019)
	40,000	Jenzabar CX	RE NXT	18	9	3	

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	67,000	Jenzabar CX	RE NXT	18	3	3	This timeline was too compacted. I'm still working to get all features up and running correctly two years from contract signing. Also, not enough internal resources were directed to the project.
	111,000	Banner Advancement	RE NXT	14	5	9	We did three test runs...I would have done 2 more if I had the money, time, and ability to go back. Lots of dupes. Salutations are still a mess. Soft credits are a mess.
	278,000	RE 7	Salesforce NPSP	12	9	6	~We don't have an overall total for all records on every object converted (i.e. contact, relationship, gift, campaign member) ~There was overlap between the design/implementation and testing/training stages.
Wingate University	98,000	PowerCampus	RE NXT	11	7	3	Signed at the end of the calendar year so a slight delay in launching the design phase.
Braille Institute of America, Inc.	Between 750,000 - 1M (we are going to be moving old data to a warehouse but needed to move everything over initially)	Luminate	Salesforce NPSP	11	14 so far; still working on customizations	6 so far; will train as long as it is needed	Luminate was a nightmare and was a very customized system and that made some of the conversion items difficult. We have a lot of things that were customized in Luminate that could not be replicated in NPSP and fall under the 'nice to have' headline rather than 'must have' (and I'm the project manager that has to make these distinctions). While longtime users of Luminate say that NPSP is not as good, I find that this is not the case from a 'normal user' standpoint. The end-user is our customer and I feel their needs are being met. The super-users will need additional training and time to become used to the system.
King's College	57,000	Colleague Advancement	RE NXT	13	18	18	Process is ongoing, we are live, yet still in implementation, testing, training, merging and fine-tuning. Balance is an estimated.
University of Nebraska Foundation	1,300,000	RE 7	BB CRM	18	24	3	We did a lot of prework prior to contact signing. From the time we issued our RFP to Go-Live was around 36 months.
Yeshiva University	150,000	Banner Advancement	CRM Advance	22			Still doing a ton of work post go-live
Saint Mary's College of CA	125,000	Colleague Advancement	EveryAction	6	4	2	We had been in Colleague since 1994. Researching needs, writing the RFP, designing the demo scoring, and doing demos for the five that responded took about a year.
University of Pittsburgh	1,000,000	Advance	Affinaquest/Salesforce	24	18	8	These are estimates. We are in month 14.
Saint Elizabeth University	27,000	RE 7	RE NXT	6	6	6	We have done this twice - the first timewe merged Access into Raisers Edge (12-month effort). Advancement was already using RE but the alumni office was using Access...very messy to say the least. Because the school was already using RE there was no need to spend time on design but those several months were spent cleaning Access and preparing for the merge. Also, training continued after we went live - Blackbaud worked with us twice a month, to learn some of the new platforms and platforms we were not utilizing.

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	15,000	RE	BB CRM	24	11	13	Possibly a unique problem, but we were joining a database we would share with other colleges so the duplication numbers were huge - up to 60%
				84			This university is embarking on an enterprise solution to replace all applications with a single platform. The total timeline is approximately 7 years. They will spend one year on pre-project requirements. One year on data governance and CRM installation. In year three Advancement will begin implementation and will go live in year four.
	1M+ (4 campuses)	Advance Web	CRM Advance	* 8-12 months goal		4	We just now signed, these are estimates
Northeastern State University	80,000	Banner Advance 8	CRM Advance	18	18	3	
	165,000	RE NXT	RE NXT	22	10	12	Audit of data prior to merger revealed several areas with issues that needed to be resolved prior to migration. An additional 24 months post "Go Live" was spent training, cleaning up data architecture, creating new business processes and dealing with stability and confidence in data.
	300,000+	RE 7	RE NXT	13	12	1	Other than the inconvenience of working in two different time zones, we didn't have any major issues with the supplier there were not of our own doing. The Implementation, testing and training stage was fairly quick (c 2months, which is quick considering he UK went into lockdown in the middle of these two months). Of the preceding 11 months, 90% of this time saw no-one working on the migration as our assigned (internal) IT project Manager was re-assigned to two higher priority projects (student facing systems) ~Solution did not provide much customization which had pros and cons: some sentiment that it allowed to adopt 'best practices' yet post-conversion, many are frustrated about the lack of customization that was previously available ~Converted to Financial EdgeNXT at the same time ~Post conversion data clean up and building out reports that were developed over 20 years of working in Banner continue: why we are 'still working on conversion' and 'when will we be done' are expressed, along with deploying new initiatives and technologies in the year since go live ~Did garner increased use of prospect data (contact reports in particular) which was a primary driver of the conversion, but overall data upkeep by gift officers continues to be an issue, together with divisional investment in capturing information in the CRM ~We needed to also purchase Omatic in order to import the value of data we have and assist with other system integrations.
	195,000	Banner Advancement	RE NXT	8	6	1	
	80,000	RE 7	???	12	12-18	6	We are doing investigations on other options of the CRM