



Empower your mission

with

sylogist[™] | **CRM**
mission

Hi there!

Is your organization evaluating a transition from Raiser's Edge and exploring whether SylogistMission, in partnership with Microsoft Cloud for Nonprofit, aligns with your strategic development and fundraising objectives—both for immediate needs and future growth?

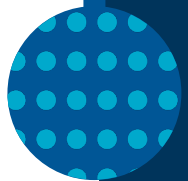


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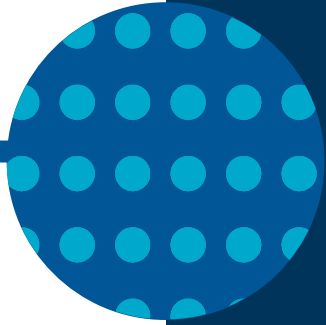
You have likely reached this point because Raiser's Edge no longer supports your organization's evolving fundraising needs, such as online fundraising, event management, or volunteer coordination.

Alternatively, you may be seeking a system that seamlessly integrates with your current technology stack, enabling cross-departmental collaboration, enhancing data management, and driving efficiency—all within a single, user-friendly solution.



This guide is intended to answer some key questions and concerns as you continue your journey of discovery.





We will explore how SylogistMission can enhance your organization's data management, financial operations, and fundraising efforts, while offering actionable insights to ensure a seamless transition to the Microsoft Cloud for Nonprofit platform and SylogistMission CRM.

Drawing from our extensive experience in guiding clients through this process, we provide tailored support to help you achieve success. If you find that any topics are not addressed in the following pages, please feel free to reach out. We are here to assist you.





Planning & Preparation



As you research new fundraising systems for your organization, there are 2 key areas you'll need to decide upon while on your journey:

1. What type of CRM you want and
2. What capabilities you must have in order to run your mission-critical operations successfully.

Evaluating Constituent Relationship Management (CRM) Options

There are key distinctions between product-based and platform-based CRMs. A product refers to a single software application developed by a company to address a specific set of business needs. For example, Raiser's Edge is designed as a fundraising-focused product.

A platform, on the other hand, serves as the underlying infrastructure for developing and operating multiple business applications. It enables organizations to manage their applications seamlessly, without concern for the technology supporting them. Products built on a common platform are interoperable, allowing them to leverage the platform's API and connectors to integrate with external systems, creating a unified source of truth.

SylogistMission CRM is a donor management and fundraising solution, built on the Microsoft Cloud for Nonprofit platform. The Microsoft Cloud for Nonprofit integrates a range of applications, including Microsoft's Volunteer Management and Volunteer Engagement tools, as well as business applications like Microsoft Dynamics 365 Marketing, alongside offerings from companies like Sylogist.

Even though moving to SylogistMission CRM Microsoft Cloud for Nonprofit will take time and effort, not only can you reach parity with traditional fundraising functionality in Raiser's Edge, but you'll also be able to do much more because it's a product on a platform.

What functionality are you replacing?

There are several core areas of donor management and fundraising-related capabilities you'll be replacing if you move from Raiser's Edge.

With SylogistMission CRM and Microsoft Cloud for Nonprofit, you can choose from a host of products which integrate with or have been built on the platform.

Let's have a look at how we can achieve parity and accelerate your momentum on these fronts:



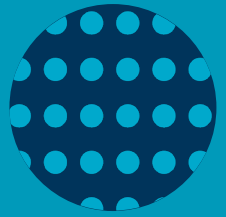
Current	SylogistMission CRM Product Capabilities	Microsoft Cloud for Nonprofit Platform
Relationship management	All biographical and demographic data as well as engagement/ interactions with constituents; giving calculations and supporting objectives	-
Gift processing	Yes. The front-door for all revenue, online/offline, one-time/ sustainer giving managed in real time 3rd party gifts easily imported via native tool	-
Prospect management	Yes. Facilitated via Opportunity module and prospect management via DonorSearch.	
Luminate Online	SylogistMission CRM's online giving pages (donation, outbound calling, crowdfunding + simple events)	Dynamics 365 Marketing for email marketing Additional options: ClickDimensions or Touchdown
Financial Edge	Pre-built integration with Microsoft Dynamics 365 Business Central, OR we can create a custom export or integration to support any other ERP system	
Event management	Simple, online fundraising/ticketed events	Complex, online/offline events via Microsoft Dynamics 365 Marketing
NCOA	Melissa Data's Smart Mover NCOA service	
Volunteer Management	-	Microsoft Volunteer Management and Volunteer Engagement
Team Raiser	SylogistMission CRM Peer-to-Peer online pages Or, utilize SylogistMission CRM's Donation Import functionality and/or Load transactions via Advanced Gift Batch Entry template for P2P- generated revenue	Power Platform API to bring in external data sources into SylogistMission CRM / Dynamics 365
OMATIC	Replaced by Donation Import functionality to bring in third-party transactions into SylogistMission CRM Instant interoperability with anything aligned with the Common Data Model for Nonprofits (CDM)	



Additional Considerations



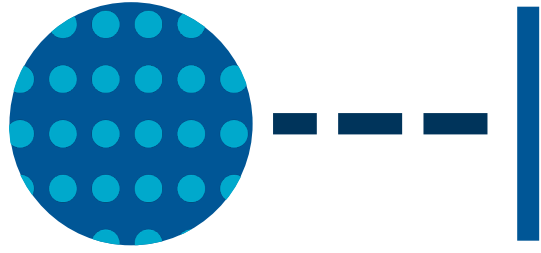
If you need additional information on the pros and cons of moving to a new system and leaving Raiser's Edge, read through the [Leaving Raiser's Edge Guide](#) developed by Heller Consulting to explore how different products and platforms can help with your organization's digital transformation.



Key differences between Raiser's Edge & SylogistMission CRM:

One of the primary challenges organizations encounter when transitioning from Raiser's Edge to SylogistMission CRM is the process of cleaning, converting, and mapping data. While this may initially seem overwhelming, it presents a valuable opportunity to prioritize your most critical information and align it with your strategic objectives, enabling data-driven decision-making as you prepare for the move to SylogistMission CRM.

In many instances, Raiser's Edge requires the implementation of workarounds to effectively manage key organizational activities, such as tracking attributes. Its inherent limitations often restrict customization, making it difficult to input and generate reports on your constituents with ease. Additionally, the lack of integration capabilities within your broader technology ecosystem can result in significant loss of staff time and heightened frustration as you navigate disconnected systems that fail to communicate efficiently.



Choosing to address issues with data management and quality is an investment.



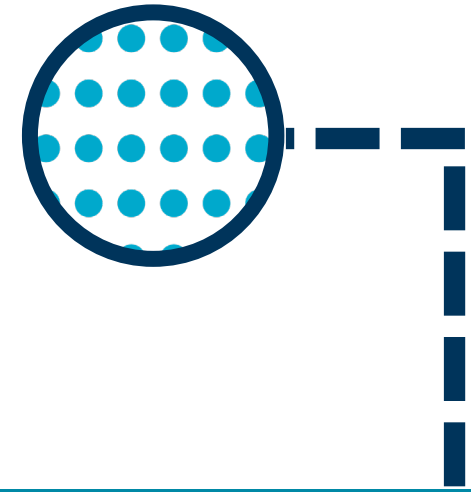
It is not uncommon for organizations to lack confidence in the data stored within Raiser's Edge. This mistrust often stems from one or more of the following factors:

- Evolving database management practices have led to the overuse of custom attributes to segment data, resulting in questionable legacy data.
- Disconnected data sources that require manual imports or integrations, increasing the risk of inconsistencies.
- Users may lack a clear understanding of the data available to them or where it is located within the system.
- Raiser's Edge does not adequately align with the organization's business processes, resulting in workarounds or siloed data across multiple platforms.
- Limited control over who can access and modify data leads to potential inaccuracies.

SylogistMission CRM offers more than just a new repository for your existing data. It enables you to rethink your data structure and align it with your organization's needs, transforming your approach to data management with a centralized and shared database.

By reflecting your business practices in the design of the database, SylogistMission CRM empowers your organization to access valuable insights that enhance your ability to achieve your mission. The platform provides a holistic view of your constituents and donors, enabling the collection and integration of data previously siloed across departments. Users will gain deeper insights into donor behaviors and preferences, allowing for more effective, targeted outreach at the right time.

Although transitioning to a new system requires time, effort, and careful attention, the long-term costs of neglecting data management and failing to upgrade outdated tools can be far greater. As you continue the essential work of maintaining data integrity, you may find that Raiser's Edge is no longer capable of supporting your organization's evolving needs.



Moving to SylogistMission CRM:



Your data is one of the most valuable assets your organization possesses. Our goal is to securely and responsibly transform and migrate your Raiser's Edge data, ensuring it integrates seamlessly into SylogistMission CRM, as though it had been originally created there.

What to Expect for a Successful Transition Pre-Implementation Phase:

In this critical phase, we rely on your institutional knowledge and insights to interpret the historical practices that have shaped your data. This allows us to transform, map, and migrate your data effectively. A dedicated data steward plays a vital role in championing and reimagining your organization's most valuable asset—its data.

Maintaining data integrity is an essential business process that requires active participation from all staff members to ensure the data remains accurate and well-managed. A dedicated data steward ensures that the diverse needs of your staff are addressed, facilitating a smooth transition and continued success.



During Implementation

Our RE data conversion service intends to migrate your legacy data into SylogistMission CRM as if it were created in SylogistMission CRM originally.

This requires a methodical approach to map, transform and validate your data through multiple sequential efforts. A scope of work will be provided as part of our Data Diagnostic service and shall include: (1) Mapping and transformation planning of your constituents, organizations, events and all gift related data from your legacy database to SylogistMission CRM and the Microsoft Dataverse.

1

You will provide our team access to the underlying SQL database for the Raiser's Edge. If you are paying Blackbaud to host your database, this may require working with your Blackbaud Account team to procure a backup.

2

Our data specialist will apply our standard RE-migration script packages to transform and convert your data into a Dynamics 365 and SylogistMission CRM Development environment. These scripts apply best practices from prior RE-migrations to map and transform your data. However, as most organizations have utilized custom attributes in the RE database, these attributes are excluded from our standard scripts and will be addressed during the crosswalk process to apply custom rules to transform your attributes.

3

We will walk you through your data in the Development environment to provide familiarity with the standard mapping, then capture any required changes to conform to your business process.

4

These specific changes will define our custom script packages and will then be applied to your data in phases that will allow your team to perform validation prior to migrating the data to production.

5

When validation is complete and approval provided, we will apply the scripts to a new backup of your data and migrate it to your Dynamics 365 and SylogistMission CRM Production environment just prior to launch.

6

Recurrence Planning – We will take the lead in helping your organization migrate recurring/sustaining donor commitments from Raiser's Edge to a SylogistMission CRM managed schedule with the payment gateway you select.



Launch

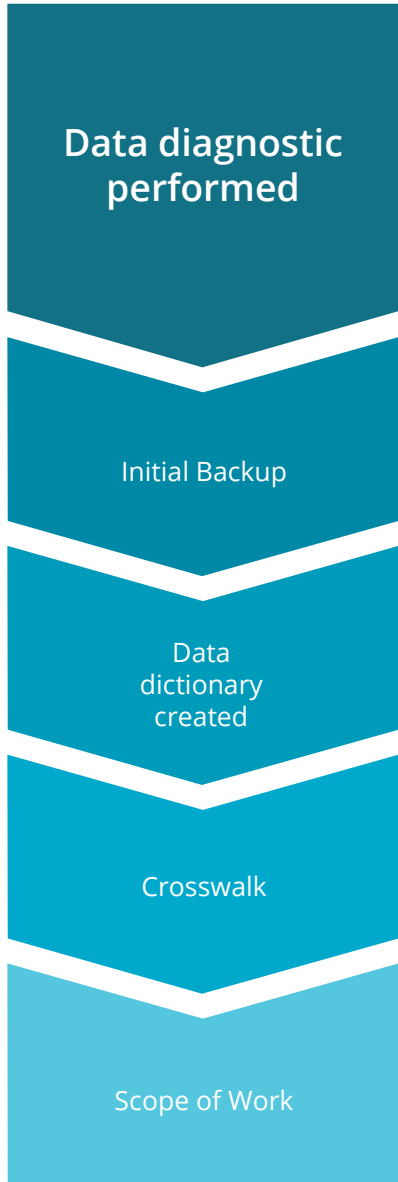
It's go time!

This is it, the final launch where we coordinate the cross-over from your legacy system and migrate your data, grant access to all users in production and activate online forms, application integrations and proceed confidently together. Our work is not done when the final buttons are pushed, because we anticipate further ad hoc training and

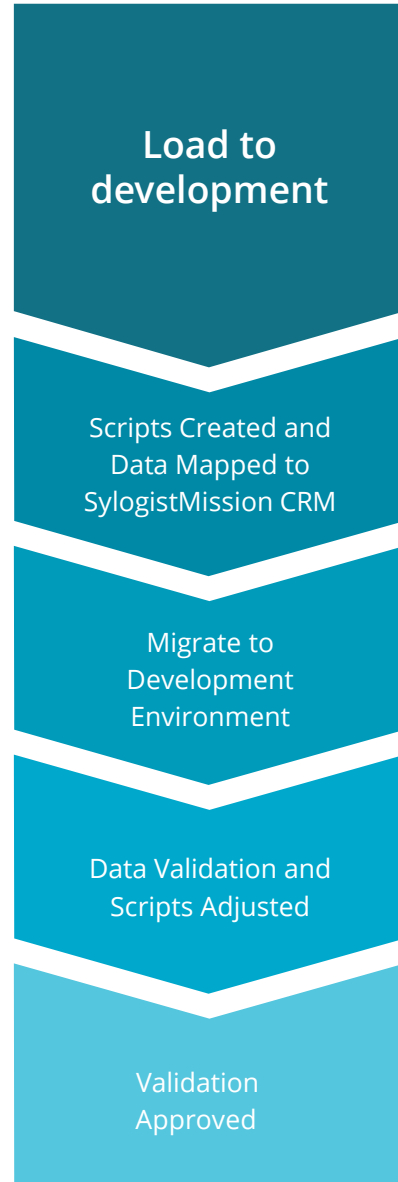
Unexpected configurations, reports and other minor changes will arise. We tackle these during our launch support and provide a warm handoff to our client support team



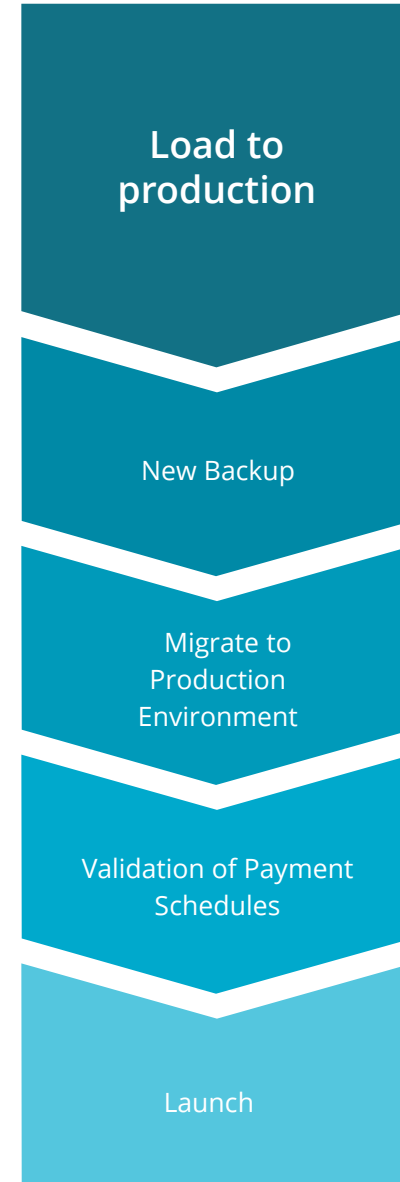
STEP 1



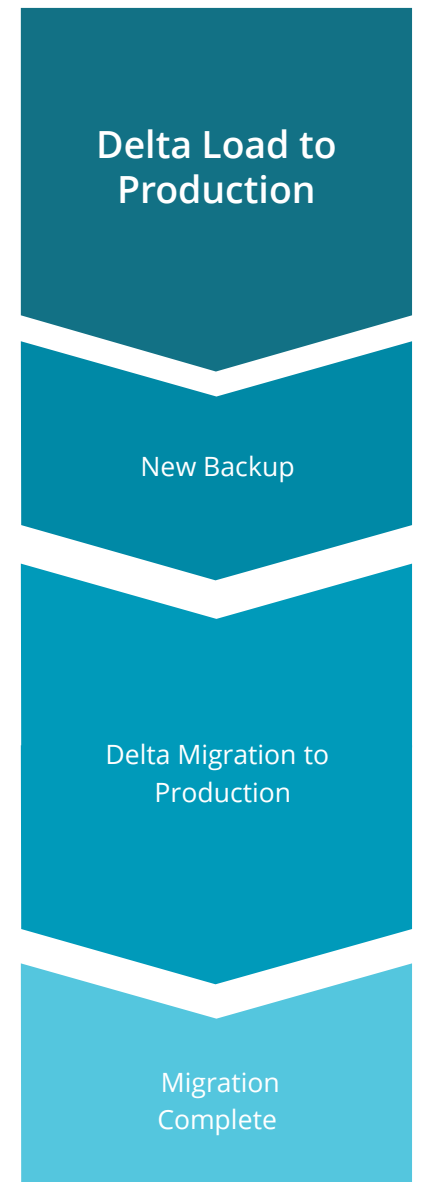
STEP 2

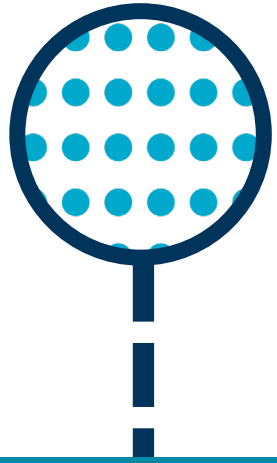


STEP 3



STEP 4





Tips for a Successful Move



SylogistMission is dedicated to advancing nonprofit operations, empowering organizations to achieve their missions and drive meaningful change in the world. Are you ready to transform your organization's future? Below are essential tips for ensuring a successful transition to SylogistMission CRM.

Identify Common Data Errors:

From your very first interaction with SylogistMission CRM, the importance of data takes center stage. As you begin working within this powerful ecosystem, a subset of your data will be introduced into SylogistMission CRM, offering valuable insights on how to transition and optimize your current processes. This will enhance information management and sharing across your organization, benefiting both employees and constituents. It is crucial to identify and address any common data errors at the outset, so they can be resolved and integrated into workflows that align with your organizational needs.



Final Thoughts

Know your organization's goals and key performance indicators.

Having clear goals and keeping key performance indicators at the forefront of your decision-making will ensure that your organization is meeting its operational and strategic objectives when it begins to transition business processes into a new CRM.

Consider change management.

The interoperability of SylogistMission CRM fosters adoption among users, however, change management is integral to the success of any organizational technology endeavor. It is imperative that organizations have thought out how systems changes will impact staff and workflows.

Let's talk about your mission!

If you'd like to learn more about making the move to MISSION CRM, we're here to answer your questions about the journey.