

Getting Ready for Blackbaud CRM Version 4.0

How to Prepare for the Next Level of Blackbaud CRM



Blackbaud CRM brings industry-leading fundraising, online applications, actionable prospect research and analytics, and multichannel direct marketing together in one platform to enable an integrated view of the constituent experience across your organization. By offering the only organization-wide solution that helps nonprofits efficiently manage traditional and nonprofit CRM responsibilities, Blackbaud CRM empowers organizations to build deeper and more personalized relationships with supporters.

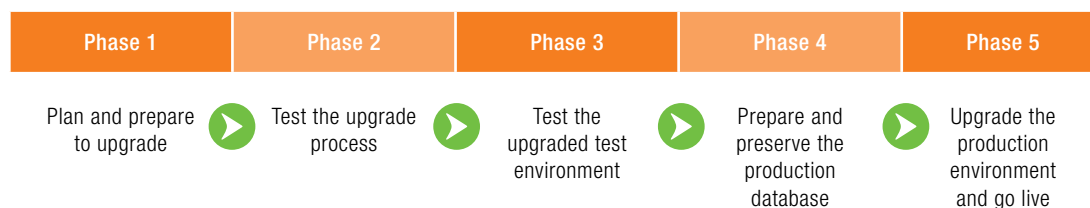
The new release of Blackbaud CRM features exciting enhancements designed to increase usability, improve quality, strengthen performance, and push the boundaries of constituent engagement and fundraising.

Reasons to Upgrade

There are numerous reasons to consider upgrading to the current version of Blackbaud CRM:

- Provides access to the latest features and functionality and helps ensure the success of your organization by leveraging the latest technology
- May allow your organization to realize cost reductions by retiring customizations and implementing new standard processes
- Enables your organization to tap into the latest usability, quality, and performance enhancements and increase the efficiency of your users and operations

The Upgrade Process



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Best Practices for a Successful Upgrade

Preparing for a successful upgrade involves multiple considerations and varies for each organization. The following tips provide initial guidelines to help ensure a smooth and successful upgrade project for your organization.

TIP #1: DEFINE YOUR UPGRADE STRATEGY. The cornerstone of any successful upgrade is a strategic plan with clearly stated objectives, timing, and a definition of success. A successful upgrade plan begins with evaluating the complexity of your upgrade effort and identifying key stakeholders, dependencies, and affected resources.

TIP #2: PREPARE YOUR ORGANIZATION. A strong internal structure provides the critical support needed to ensure upgrade success. A hard working upgrade team with clearly defined roles should be supported by a fully engaged leadership team. Executive leadership support provides guidance throughout the course of the project, ensuring budget alignment, project management support, obstacle clearance, and that the project gets the necessary attention throughout the organization.

TIP #3: REVIEW CURRENT VERSION AND UPGRADE INFORMATION. Blackbaud provides numerous resources to help customers prepare for software upgrades. Be sure to review new version resources, such as system requirements, user guides, new features videos, and walk-through documentation to align new features with your upgrade plans. The upgrades and release forum on the Blackbaud CRM Community provide insight and context into other organizations that have recently upgraded.

TIP #4: REVIEW DATA QUALITY. A key component in preparing for any software upgrade is ensuring the completeness and accuracy of your data. Taking time to review duplicates, verify data integrity standards, and review the overall health of your database before embarking on a system upgrade can help achieve accurate testing results and improve performance and efficiency.

Blackbaud CRM 4.0 allows organizations to leverage a flatter, simpler query view to increase faster query process time and reduce the burden on the transactional database. Be sure to review appropriate constituent queries to move from the transaction system to the Blackbaud Data Warehouse as part of your upgrade checklist.

How Blackbaud Can Help

The Blackbaud Customer Support Team and Blackbaud Professional Services are available to support your organization throughout the upgrade process. Organizations can enlist the help of the Blackbaud to supplement internal resources, provide technical guidance, and more. A project manager from the Blackbaud Support Upgrade Team will provide advice and oversight, including strategy, scope of work, timeline, a custom project plan, and post-upgrade lessons learned. A dedicated upgrade specialist is also available to complete test upgrades and provide upgrade specific issue resolution.

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Some additional areas where Blackbaud Professional Services can help with your upgrade include:

TESTING

- Test Script Development
- Functional Testing Assistance

TRAINING

- High-Level New Feature Overview
- New Feature Testing Training
- Power/End-User Training

DESIGN REVIEW

- Customizations
- Reports

ENHANCED GO-LIVE SUPPORT

Check out the [Blackbaud CRM Community](#) for additional information or contact your technical account manager to discuss upgrading your organization to Blackbaud CRM 4.0.