Four Keys to a Successful Conversion

We are proud to offer you our version 7 products — **The Financial Edge™**, and **The Education Edge™**. When converting from our version 6 products, follow the four keys our clients have identified as crucial to a successful conversion: time, comprehensive plan, hardware, and services/training.

Time

- Plan your conversion when you and your staff can devote sufficient time to its planning and implementation.

- Allow time for you and your staff to become comfortable with the new look and feel of the program and the hundreds of new features.

- Allow time to recreate queries, report parameters, and Crystal reports because these do not convert to version 7.

- Allow time to perform one or more test conversions to determine the best conversion path for your organization.

- If you use more than one Blackbaud product, convert in this order:
    1. From Accounting for Nonprofits to The Financial Edge
    2. From Admissions and Registrar's Office 6 to The Education Edge

Comprehensive Plan

- Study your product's detailed conversion documentation to learn about new features and the differences between versions 6 and 7. Each Conversion Planning Guide includes a sample conversion plan. All guides are available for download. On the Support section of our Web site, select User Guides.

    - **The Financial Edge Facts for Converting Clients** (PDF) & **The Financial Edge Conversion Planning Guide** (PDF)

    - **The Education Edge Facts for Converting Clients** (PDF) & **The Education Edge Conversion Planning Guide** (PDF)

- With your IT director, study your product's Conversion Guide and Database Administrator's Guide, also available on the Support, User Guides section of our Web site.

- Secure commitment from a cross-functional conversion team including technical staff, end users, and managers under the direction of a designated lead and an executive sponsor. If you use more than one Blackbaud product, the team must include representatives from each office (i.e., development office, business office, admissions office, and registrar's office).

- When you convert multiple **Accounting for Nonprofits 6.4** programs (such as **General Ledger**, **Accounts Payable**, **Student Billing**, and **Payroll**), be sure to include enough time between conversions to test the data and complete the post conversion tasks before starting the next conversion.

Hardware

- Review each product's system recommendations with your IT staff and upgrade your hardware before you convert. On the Support section of our Web site, select System Recommendations.

- Review SQL Server 2000 for Blackbaud Products to determine which version of SQL Server 2000 (MSDE, Standard, or Enterprise) is right for your organization. On the Nonprofit Resources section of our Web site, select White Papers.

Services/Training

- You are highly encouraged to schedule training for all members of your staff, regardless of their level of expertise with the version 6 programs. In fact, you should consider training a requirement for your organization. Version 7 is a new product that includes not only new functionality, but many new and different ways of performing tasks present in version 6. Even if your staff has experience with version 6, because of these changes to existing functionality, you risk an inefficient and difficult conversion unless they receive specific training for the new version. Clients who have converted state that training was key to their success. Training is an important investment in every aspect of your organization, staff operations, and mission. If you use more than one Blackbaud product, train the staff in each department. For more information, visit the Training section of our Web site.

- Determine which services best meet your organization's needs. We offer consulting services to assist you with every aspect of your conversion and implementation, including remote installation. We also offer secure Hosting Services, which can free your organization from the cost and upkeep of hardware concerns. For more information, visit the Services section of our Web site.

Contact your account manager at 1.800.443.9441 or solutions@blackbaud.com with any questions. We are here to help you before, during, and after your conversion. When you are ready to proceed, your account manager will provide you with a Software Request Form to help guide your planning and assess your organization's readiness to convert.