



# CRM SET-UP AND MIGRATION SERVICES

*From Spreadsheets to Smart Systems — Without Losing Your Donors*

## OVERVIEW

A messy database kills fundraising efficiency. Whether you're moving from spreadsheets, Excel exports, or a legacy CRM, we design and execute migrations that preserve data integrity, improve segmentation, and streamline donor engagement. We combine technical precision with fundraising strategy — so you get both clean data and usable insights.

### *Core Services*

- **CRM Selection & Scoping:** Evaluate current tools and recommend best-fit CRM (Kindful, DonorPerfect, Bloomerang, etc.) based on organization size, team capacity, and reporting needs.
- **Data Audit & Cleansing:** Identify duplicates, standardize fields, and ensure consistent formatting for donor names, addresses, and giving histories.
- **Field Mapping & Customization:** Align your legacy data fields with the new CRM structure; set up tags, custom fields, and segmentation for campaigns.
- **Import & Quality Assurance:** Safely migrate contacts, gifts, pledges, and communications. Validate accuracy through test imports and cross-checks.
- **User Setup & Training:** Configure user roles, dashboards, and reports. Provide team training on day-to-day use and maintenance best practices.
- **Post-Migration Support:** 30–60 days of troubleshooting, refinement, and optimization for donor reports and integrations (e.g., QuickBooks, Mailchimp, etc.).

## *Deliverables*

**Data Audit Report** (pre-migration issues & recommendations)

**Migration Plan** (field map, timeline, responsibilities)

**Finalized CRM Environment** (fully populated & tested)

**User Manual + Training Session** (customized for your team)

**Post-Migration Report** (accuracy checks, next-step suggestions)

## *Outcomes*

- Reliable, unified donor database ("single source of truth")
- Reduced administrative burden and faster reporting
- Improved segmentation for appeals and stewardship
- Increased confidence in analytics and forecasting

## *Pricing Tiers (Based on list size and complexity)*

|               |                          |                     |
|---------------|--------------------------|---------------------|
| <b>Tier 1</b> | Up to 1,000 records      | \$2,500 - \$5,000   |
| <b>Tier 2</b> | 1,000 to 10,000 records  | \$5,000 - \$7,500   |
| <b>Tier 3</b> | 10,000 to 25,000 records | \$7,500 - \$12,000  |
| <b>Tier 4</b> | 25,000+ records          | \$12,000 - \$20,000 |

### ***Add ons***

- QuickBooks Integration Setup: \$1,000 flat
- Custom Dashboard Build (KPIs, Donor Retention, LYBUNT reports): \$750
- Staff Training Video Recording: \$500

