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Factsheet: **Data Migration**

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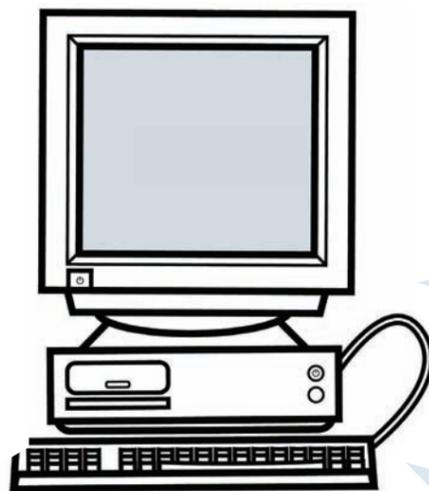**Charitytimes Data Migration Factsheet**

Data Migration

What is Data Migration?
You've selected a new CRM or fundraising database and you can't wait to forget about that awkward, old system that used to give you such a headache and start using the sleek interface and powerful functionality of the new software. But how many of those headaches actually lie in the software and how many lie within the data? If you haven't planned to invest time in sorting out your existing data, your shiny new software will struggle to provide you with what you had hoped for.

Data migration is the process of transferring information from old software systems into a new one; but if you see it as simply a mechanical process involving a programmer, a darkened room and a few weeks of work you will miss a great opportunity.

Where is all my data?
You probably have a centralised database of contacts. But most organisations harbour many more secret databases, hidden away on people's computers – even if they are simply lists of contacts in an Outlook address book or spreadsheets of phone numbers being used for a current project. Before you dive into the migration process, take a step back and encourage everybody in your organisation to come forward with their secret databases.

You may need some IT assistance to extract the data from their computers, but the process should be easy. At this stage, don't worry about the format of the data, just focus on discovering what information

you actually have. Now you can see what you have available, you need to agree where the most accurate data is – where did it originally come from, when and how was it last updated?

Unfortunately, there is often overlap between these 'datasets' and you may need to compare certain types of records within a dataset – for example, your high value donors will exist in the central database, but does your major donor fundraiser keep a more up to date set of details?

These days, disk space and processor speed do not normally restrict the amount of data you can store, so the concept of separate archive databases is becoming less relevant. However, your data does age a lot more quickly than you imagine; 13 per cent of people move house each year (QAS, 2006) which means that after five years without 'definite' contact with a donor there is a 50 per cent chance they no longer live there. So although you do need to keep donor records for auditing purposes, you should work alongside your IT team to evaluate how relevant the data is, and make decisions about whether it is worth migrating.

Seeing the wood for the trees
Once you know what data you wish to migrate, it's time to start the process of mapping the old data to the new database, field by field, and usually this is where you will turn to your software supplier. But before you embark on this, can you simplify the task even more?

It's worth remembering that the time taken to develop a data mapping often outweighs the process of physically copying records of data. If you have data
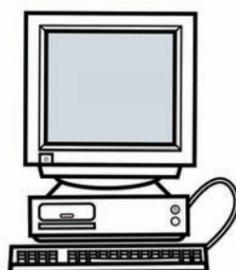
sources containing relatively few records, you may save yourself time and money by manually entering these, either into an existing database or the new one.

Are you a bit of a hoarder or do you keep a nice tidy desk? When you are migrating your data it is instinctive to keep every bit of information possible. But think about keeping only what you are going to use. Databases come into their own – providing powerful searching and reporting – when a good proportion of records have information in any given 'field'. If you happen to know the "cat's name" of only a few supporters, are you realistically ever going to search or report on that field? Unlikely – so decide if this information should be brought into a generic notes field – or even, if it is required at all.
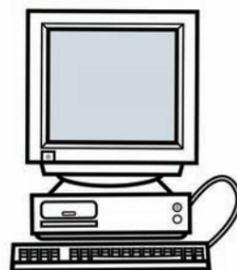
Opportunities
You will probably (hopefully) never spend this long working with your data in this 'raw' form again. So what else can you do with the data while you are going through this process?

How about mailing everybody to check their information? Well, this can go one of two ways. One organisation generated so much income through additional donations and back-dated Gift Aid Declarations that they paid for their new system. Another organisation shied away from this process because they knew a large number of their donors gave through payroll giving and had actually forgotten they were making a donation.

If you are going to mail everybody – and telling them about the database project may be a good reason – how are you going to capture the response? You are trying to improve your data, not

generate an enormous pile of reply slips telling you your information is correct. You may have a website where contacts can update their details, but if not, some very simple technology can make a big difference. Bar coding response slips or asking people to email to a dedicated email address allows them to be quickly processed. Speak to your database supplier for help with this.

And above all else, while you are having this tidy up, make sure you cleanse the data.

Cleansing the Data
Like some people, databases often start out clean and full of promise, but soon become a bit rough round the edges, harbouring a few dirty secrets. However good your housekeeping, your old data does need cleaning. Inaccurate addresses don't find their destination – for every piece of returned mail from a wrong address, think how much more doesn't even make it to an address. But once you have cleaned the addresses, you will still have duplicate records – and this requires a bit of business intelligence. Are two Mr Smiths at the

same address a duplicate, or father and son? Can they be distinguished – do you store email address, date of birth or mobile phone number? Do you need to contact them separately, or would a single letter to the 'Smith family' get a better response?

Decisions like this pose a real financial dilemma – the risk of sending duplicate letters and alienating supporters versus missing out on reaching people and retaining their support. They shouldn't be left in the hands of the IT team alone. But until you know what your data holds, you cannot make an informed decision; so make sure that people who understand your organisation work alongside the IT team, and that you give them enough time to make intelligent decisions.

Good address cleansing databases will contain extra demographic information telling you the typical person living in any given postcode. Consider adding this information into your database, and using it to improve the relevance of your mailing selections.

As ever, keep focused on the scale of the problem. How much data are we talking about? It is important to never
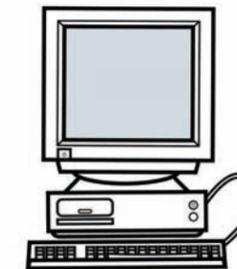
forget the intelligence with which a person can review and update information compared to a set of programmatic rules.

What about Data Protection?
The majority of charities will have a database of supporters and volunteers who are happy for you to contact them for the good of your organisation. And provided they have communicated with you in the past, this consent will override any registration, such as with the Mailing Preference Service (MPS). However, if the data migration process has seen you merge separate datasets that were originally used for different purposes, you may need to be careful. In theory there is no problem with this, unless the data was only collected for a specific function; so before you share it with the rest of the organisation – are they actually allowed to use it?

Keep it clean – with the human touch
Finally, you have made your decisions, the database has been made to sweat and you've got a lovely clean dataset ready to work with. Finished?
Unfortunately, no. Think about how you are going to maintain it. Your software will help to make sure that certain fields are populated, data is entered from drop down lists and de-duplication checks are completed, but remember, the software is a human tool – which means that the humans using it need to know what they are doing. Train people well, and keep training them; think about writing data-input protocols so that staff can be trained to use consistent styles and perform regular spot-checks on data to check for inconsistencies.

Remember, a database is only as good as the data in it. Good luck!