



## **Implementation Overview Including Data Conversion and Training**

The average implementation time is 30 to 60 days from signed contract. During the implementation, we will convert your current data/database into DonorPro and help you become proficient with the system. We will assign a dedicated implementation specialist to you. The same day that we receive your signed DonorPro agreement, we will send you a welcome e-mail outlining the implementation process and introducing the principal points of contact on the DonorPro team. The e-welcome materials also contain the license file for DonorPro access and links to online DonorPro user manuals. You can begin accessing DonorPro immediately.

We follow up on each e-welcome with an official kick-off phone call. During the kick-off call, we will review your specific data conversion requirements and discuss how data will be extracted from your current tool(s). Once we have secured a file of your data, we begin work on data mapping. During data mapping, we work with you to understand how the current data is used and the best way for that data to appear in DonorPro. This process also includes initial configuration of the DonorPro software including recommendations based on best practices and your optimal workflow for custom fields, menu configurations, custom forms, queries, relationships, groups for segmenting the database, and other processes.

Once data mapping is complete, our implementation specialist executes a test conversion. Upon completion of the test conversion, we ask you to log in to DonorPro and validate the data. We will provide checklists and other tools to make data validation straightforward. Once this verification is complete, we make any adjustments necessary to our conversion program prior to final conversion.

After the test conversion but prior to the final conversion, we conduct training. Training can either be at your facility or can be conducted online. By scheduling training between your test and final conversions, we are able to train you using your specific data. Then, to supplement this instructor-led training, we have a comprehensive library of training videos available for download.

Prior to the final conversion, you will continue to use your current tool(s) to manage your data. Just before we run the final conversion, we will take another snapshot of your data and then run the final data conversion. Once again, we will ask you to verify the converted data and once complete, you can begin using DonorPro in production.

You will decide how fast you want to move with implementing DonorPro. Our typical client usually takes 6 weeks from signing the DonorPro agreement to using DonorPro in production. This timeline will depend on your availability and the complexity of your data. Throughout the process, we will keep you apprised of the status of your implementation.

The chart below shows our suggested implementation schedule. When we receive your data/database, we will work with you to create a schedule that reflects your availability and specific needs. To help you balance DonorPro implementation with your normally scheduled activities, we have included a description of the help we will need from you for a successful implementation.

<b>Week</b>	<b>Client Contact Time Required</b>	<b>Activities</b>
Zero	Moderate	<ul style="list-style-type: none"> <li>• Send all source data to TowerCare for conversion</li> <li>• Review welcome pack and plan the conversion project</li> <li>• Access DonorPro</li> </ul>
One	Moderate	<ul style="list-style-type: none"> <li>• Implementation Specialist analyzes your database and maps to DonorPro</li> </ul>
Two	Minimal	<ul style="list-style-type: none"> <li>• Implementation Specialist completes a test conversion of your data into DonorPro</li> </ul>
Three	Extensive	<ul style="list-style-type: none"> <li>• Implementation Specialist trains you on DonorPro using your test conversion</li> <li>• Client reviews the test conversion</li> </ul>
Four	Extensive	<ul style="list-style-type: none"> <li>• Client continues to review the test conversion</li> <li>• Client documents any issues that must be resolved for the final conversion</li> </ul>
Five	Minimal	<ul style="list-style-type: none"> <li>• Client sends the donor database for the final conversion</li> <li>• Implementation Specialist completes the final conversion and 'turns-on' the live DonorPro system</li> </ul>
Six	Extensive	<ul style="list-style-type: none"> <li>• Client conducts final review of the DonorPro system</li> <li>• Implementation Specialist provides support as needed for approximately 10 days</li> </ul>
Seven	Moderate	<ul style="list-style-type: none"> <li>• Client Project Manager returns a signed conversion validation form to TowerCare</li> <li>• Implementation Specialist introduces Client to the DonorPro Customer Care Team and DonorPro Helpdesk</li> <li>• Client begins using DonorPro</li> </ul>