Strategies for Successful Data Conversion

"My experience is that most associations try to convert more data than they really need to."

~ Wes Trochlil | effectivedatabase.com

A key to successful **AMS** implementation is data conversion; it entails moving the data you're tracking in your legacy systems into your new system. As a trusted partner in your organization's success, we will ensure you have the data you need, when you need it, to ensure a positive experience using your new GrowthZone AMS.

ASSESSMENT OF YOUR GOALS

It is important we understand what your association's goals for growth are in the next couple years so we can help convert the data you need to support those goals.

For example: If your goal is to increase event revenue by 20% in the next two years, then it's necessary we convert the data you need to measure that goal. If your goal is to increase retention by 5%, then we'd make sure we convert data to provide those reports in GrowthZone.

> "THE DATA-FRIENDLY ASSOCIATION UNDERSTANDS - EVERY PIECE OF DATA MANAGED SHOULD, IN ONE WAY OR ANOTHER, SUPPORT THE ORGANIZATION'S MISSION."
>
> Wes Trochlil | effectivedatabase.com

DATA TO CONVERT

We've learned a thing or two after decades of converting data for thousands of organizations. Here's a list of the data we find is most essential to convert to your new AMS:

- ✓ **Your contacts and the information about their memberships**

- ✓ **The events your members have participated in during the last 1-2 years**

- ✓ **Opening balance and/or all open and unpaid invoices (so we can re-create your current accounts receivables)**

- ✓ **Data that helps you measure your specific goals**

The general rule of thumb for converting data is that most often, less is more.

We can help you determine what data is most vital to convert to your new **GrowthZone AMS**, and then we'll archive your additional data in Excel or another format, so you can still get to it, should you need it down the road.

WHY NOT CONVERT EVERYTHING?

Candidly, your data is probably a lot messier and more inconsistent than you think.

Association data management pro, Wes Trochlil, has this advice about data conversion:

Use data conversion as an opportunity to do some serious spring cleaning. Use worst-case scenario decision making to answer the question "Should we convert this data element?" When asking that question, also ask "If we don't convert this data, what's the worst thing that can happen?" If the worst case is something like "We'll look it up in the old system," then it might be a good candidate for not converting.

RULE 100 & 1000

Wes Trochlil coined the Rule of 100 and 1000, as it pertains to data conversions. It asserts if you have fewer than 100 records to convert for some given subset of data (e.g. committees), it is typically easier to re-key this data after the new database is set up, rather than trying to convert the data into the new system via some script. If you have more than 1000 records, and they are critical, then have the AMS provider convert them. If it is something in between, do some quick analysis to see what makes sense.

> "IF YOU HAVE MORE THAN **1000** RECORDS, AND THEY ARE CRITICAL, THEN HAVE THE AMS PROVIDER CONVERT THEM."
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THE BOTTOM LINE

Converting "bad" data, useless data, or data that only provides marginal benefit, will only clutter up your new AMS system, and is not worth converting.