

Enterprise Fundraising Platform Implementation Checklist

A step-by-step guide to help large nonprofits roll out a new enterprise fundraising platform smoothly and strategically.

Before you sign the contract

Data & systems prep

- Run a full data audit (donors, gifts, P2P data, events, corporate giving, spreadsheets).
- Identify duplicates, outdated records, incomplete fields, and problematic imports.
- Decide what to keep, archive, or clean before migration.

Tech stack alignment

- List every system that needs to integrate with the new platform:
 - CRM
 - Marketing automation
 - Finance & accounting
 - Event tools
 - Corporate giving tools
 - Volunteer management
- Document existing data flows and where breakdowns occur.

Rollout planning

- Build a phased implementation plan (core giving → events/P2P → automations).
- Assign internal leads for Fundraising, Finance, IT, and Marketing.
- Establish a timeline with milestones, risks, and testing windows.
- Confirm internal staffing capacity for onboarding and platform administration.

0-90 days after selection

Environment setup

- Configure the sandbox/test environment.
- Test forms, branding, donor journeys, and user roles.
- Set up permission groups and access policies for different teams.

Data migration

- Migrate data in waves:
 - Wave 1: Active donors, recurring gifts, recent transactions
 - Wave 2: Event/P2P history
 - Wave 3: Legacy/archived data
- Validate migrated data with CRM + Finance teams.
- Document any data rules (naming, coding, tagging).

Pilot campaigns

- Launch 1–2 low-risk pilot campaigns to test real transactions.
- Test donation flow, mobile experience, receipts, and reporting.
- Collect staff + donor feedback for improvements.
- Fix friction points before expanding.

Staff training

- Create internal guides for:
 - Campaign creation
 - Recurring gift management
 - Reporting & dashboards
 - Reconciliation
 - User/permission management
- Train all relevant teams (Fundraising, Finance, IT, Marketing).
- Identify “super users” for each department.

3-12 months after go-live

Expand usage across teams

- Onboard additional teams, regions, or chapters.
- Build consistent templates for donation pages, campaigns, and events.
- Standardize naming conventions, tags, and coding across departments.

Deepen integration

- Connect additional systems once core workflows stabilize:
 - Marketing automation
 - Corporate giving platforms
 - BI dashboards/data warehouse
 - Volunteer tools
- Review data sync rules and create reconciliation checklists.

Optimize using analytics

Monitor:

- Conversion rates
- Recurring donor growth
- Mobile performance
- Event ROI
- P2P engagement
- Corporate giving participation
- A/B test forms, ask amounts, and messaging where available.
- Adjust templates and workflows based on performance insights.

Governance & compliance review

- Audit user access and permissions quarterly.
- Review integration keys, admin privileges, and API connections.
- Update finance reconciliation workflows as volume grows.
- Ensure documentation stays current as teams evolve.