



Oxfam Data Migration

A CRM Transformation



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OUR CLIENT

Oxfam are a global movement tackling poverty across the world. They work with partners and communities to find practical, innovative ways for people to lift themselves out of poverty and thrive. Oxfam's frontline services cover a wide scope and their needs as a fundraising organisation are similarly diverse.



CLIENT REQUIREMENTS

Oxfam were undergoing a CRM transformation project from a highly customised, 20+ year old legacy system to Salesforce. The project fell several months behind schedule, at which point DCA was brought in to address data knowledge gaps and ensure the project could meet the revised deadline: 5 months from when Oxfam engaged DCA.

Oxfam engaged DCA to manage the full scope of data work required for the migration aspect of the CRM project.

Ideal success outcomes included:

- Go live in 5 months
- Migration of millions of records
- Testing and Reconciliation of data
- A trustworthy final source in Salesforce
- Change management and adoption success with all users utilising Salesforce daily
- Have a viable replacement for Oxfam to operate BAU, e.g. process donations and streamline other key business processes with the new optimal system
- Decommissioning of the legacy system with a clear cutover strategy



THE PLAN

Roadmap and Workshop

DCA conducted a workshop with Oxfam to review the project schedule and get full visibility over the project, as well as introduce our team to key Oxfam stakeholders.

During this phase DCA also reviewed the full Salesforce schema, developed business rules, and defined the workflow.

DCA undertook an audit of all Oxfam CRM project data artefacts, identified cleansing requirements, and created a roadmap.

Data scoping, mapping, transformation, consolidation and migration into Salesforce CRM

Along with ongoing project management and WIP meetings with the Oxfam team, DCA accessed target systems, source systems, test environments, and backend systems.

DCA undertook a full data consolidation before transforming and outputting the full dataset in the required format for the new CRM. The team completed user acceptance testing and quality assurance and migrated the data to a testing environment for further UAT.

Prior to the final load into the new system, DCA cleansed, deduped, and consolidated any new records since the initial extract.

During the go-live, DCA enacted final testing and QA to ensure all records had been migrated successfully, performing data checks and providing a final data processing report to Oxfam.

DCA also provided extensive post-migration and adoption support.

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THE SOLUTION

DCA's solution to Oxfam's data migration problem was a carefully phased, comprehensive data project.

The DCA team moved records across several vital data tables out of an unstable, untrustworthy legacy system that had been heavily customised and operational for more than twenty years.

Due to the tight turnaround and large volume of data, the DCA solution had to be precisely staged and planned to ensure both minimal interruption to Oxfam BAU and on-time completion. The phased approach enabled DCA and Oxfam to work together seamlessly toward all Oxfam's goals for this project.

DCA took data from an old system, transformed it to fit a single source of truth, and migrated it successfully into a new Salesforce instance.

The legacy system was difficult to integrate with other systems, which resulted in out of date and incorrect records. Cleansing, deduping, validating, and enhancing Oxfam's data rather than migrating like-for-like information drove additional value for the new CRM.



THE BENEFITS

Time and money saved

- Processes that would once take two weeks now take half a day
- Tasks once requiring a team of 15 now only need a team of two, allowing our staff to focus on core fundraising functions
- It would have taken more than 7 years for a team of 10 to manually enter all the records moved into the new Salesforce CRM.

Trustworthy data

- Regular giving represents 70% of donations and relies on having the right contact details for every donor
- The 20-year-old legacy system was inaccurate and had many duplicates

Modern systems for efficient fundraising

- The old system could not easily connect to other key platforms, hindering donor outreach
- The new CRM is integrated and allows Oxfam to engage with more modern fundraising techniques

Impossible to achieve without a qualified data partner

- DCA met a tight deadline of 5 months, something internal staff and other providers were unable to do
- DCA's staged approach kept impact to BAU at a minimum
- Expert local team filled knowledge gap and ensured smooth project completion



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DCA DATA SERVICES

With nearly three decades' experience, DCA are leaders in data migration, consolidation, and quality B2B data targeting Australia and New Zealand. Our business is built on having the best people, systems, and solutions on hand for our clients. We are technology agnostic and offer:

- Data analysis, migration, cleansing, and validation
- Lead acquisition and data enrichment
- Expert data services team creating single customer views
- Market planning and assessment
- Data management, donor, and loyalty program management

Our corporate, government, and not-for-profit clients rely on our data, technology and expertise to drive data transformation and make business-critical decisions.

"Interactions with DCA have always been really positive and professional, and the individuals we've had involved have set the standard for customer care. They came in knowing what we were talking about straight away, and the team allocated to do the work were extremely adaptable. They worked tirelessly to make sure we could go live when we needed to.

We were in a risky position, trying to go live with a big migration and having serious data issues, and now we're very secure.

DCA know what they're doing."

David Overend

CIO Oxfam Australia

Contact us on 03 9320 9000 or visit data.com.au

dca
database consultants australia