

Just Because You Can, Does It Mean You Should? Evaluating When to Build a Customization and Proceeding Thoughtfully

Bill Connors, CFRE

Independent Consultant on
Raiser's Edge

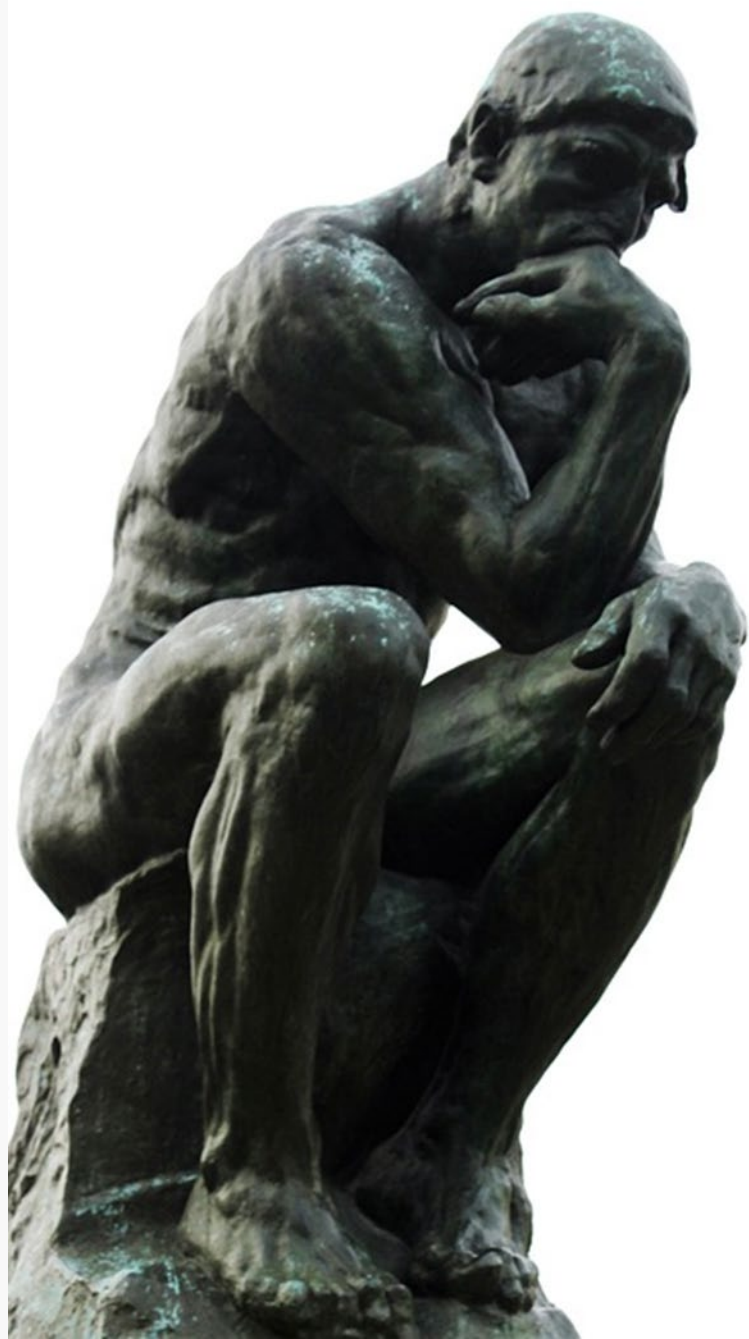
Ellen Smith

Director, Development Systems
Conservation International

Agenda

1. Introductions and reasons why we're cautious
2. If you do proceed, principles to keep in mind
3. Discussion





Evaluating a Customization Idea

- Is the need legitimate, legitimate enough?
 - Remember tables, attributes!
 - Is email *really* a good alternative?
 - Can management articulate a specific goal?
- Is there a more workable, sustainable alternative?
 - Is there a compromise?
- How does this fit into other priorities, like security, training, documentation, cleanup?

Evaluating a Customization Idea, cont'd

- What's going to happen when you're not there?
 - Budget to replace you at your skill level, regardless of your current pay?
 - Marketplace of similarly skilled prospects at that pay?
 - Does management understand that?
- Is it better to outsource it?

Evaluating a Customization Idea

- Can you position yourself to lead the project?
- Are you prepared for the time commitment involved in doing this in-house?
- Is your database ready? Clean, consistent data with an organized structure is key to success.
- Do you understand your Microsoft licenses?
- **Do you have a goal? A problem to solve?**

Proceeding with a Customization

- Don't make it more complicated than your successors can support
- Start simple with small victories
- Make it adaptable – needs *will* change
- Simplify, don't further customize
- Drive users into the software, not end-runs around it

Proceeding with a Customization, cont'd

- Document, document, document
 - Not just how to use it, but how it's setup, *why* it's setup that way, how to modify it over time
 - Document the data entry it's reliant upon and the data checks that need to be done to ensure functionality
 - You're not teaching someone coding
 - Make sure that documentation is accessible

- Train others

Something to think about...

We all need excitement about our work, job fulfillment, and professional development, but our organizations pay us to first serve the needs of the organizations, not ourselves.

What's best for the organization?

Even if you're willing to do the work on your own time.

Discussion

- Reasons you've hesitated or said no
- Reasons you've decided to proceed
- Tactics used to ensure continuance beyond you

Thank you!

Bill Connors, CFRE

Independent Consultant
and Trainer on Raiser's
Edge

415.377.9197

bill@billconnors.com

billconnors.com

Ellen Smith

Director of Development
Systems

Conservation International

eesmith@conservation.org