lake one

A CHECKLIST FROM LAKE ONE

What to know about your own operation before you replace Blackbaud

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Most organizations start a CRM search by booking demos. The ones that choose well start by writing down how they work today. This checklist is 26 things to find out about your own shop before you talk to any vendor, including us.

Lake One is a HubSpot partner. This checklist is not about HubSpot. Every item applies whether you move to Salesforce, Virtuous, Bloomerang, HubSpot, or decide to stay on Raiser's Edge or Blackbaud CRM.

Blackbaud publishes a useful guide to running a CRM evaluation and scoring vendors. This checklist comes before that: it is what to know about your own operation first.

Several items come from one migration we have published in full: World Hope International, a $20.6 million global NGO that moved off Blackbaud CRM in January 2026. Where a number appears below, it is theirs.

Contract and cost

4 ITEMS

- [ ] **1. Write down your renewal date and notice period.**
  These set your real timeline. World Hope kept Blackbaud running for reference until March 2026, two months after cutover. You need contract runway for an overlap like that.

- [ ] **2. Add up what you pay each year across every platform that touches a donor.**
  Count the CRM, email, giving forms, texting, and payment tools together. World Hope's total was $220,000 across three platforms.

- [ ] **3. List every tool that holds donor or gift data.**
  Include the spreadsheets. The list is usually longer than anyone expects.

- [ ] **4. Note which contract ends first.**
  That date often decides the order of the work. For World Hope, an expiring marketing contract meant email moved months before the CRM did.

Your data

6 ITEMS

- [ ] **5. Count your designations, in total and in use.**
  World Hope had 2,437 designations and 114 in use.

- [ ] **6. Describe how households are recorded.**
  Check whether one family's address and giving history is repeated across several records.

- [ ] **7. Write down how you record hard credits and soft credits.**
  Then check whether the practice has been the same for the whole life of the database.

- [ ] **8. Pull a sample of records and count the duplicates.**
  A sample is enough to know the size of the problem.

- [ ] **9. Decide how many years of history you need in a new system.**
  Three to five years of clean data is easier to move than 20 years of everything. Keeping everything is a legitimate choice. It is also the harder one.

- [ ] **10. Find out whether you can get a full export of your own data.**
  Ask what format it comes in and what is left out.

Gift processing and finance

6 ITEMS

- [ ] **11. Walk a mailed check from the envelope to a recorded gift.**
  Count the steps and the people.

- [ ] **12. Walk a deposit through reconciliation.**
  Count how many systems are compared by hand. At World Hope it was four.

- [ ] **13. Find out who builds the general ledger posting file each month.**
  Ask how long it takes. At World Hope it was the CFO, by hand.

- [ ] **14. List your gift types and the receipt each one gets.**
  World Hope had six, each with its own template and credit treatment.

- [ ] **15. Name your accounting system and how gift data reaches it today.**

- [ ] **16. Record how pledges are tracked against payments.**

Online giving and payments

3 ITEMS

- [ ] **17. Count the steps between an online gift and its record in your CRM.**
  World Hope had five manual steps.

- [ ] **18. List your payment processors and who holds each account.**

- [ ] **19. Count your recurring donors and note where their payment details are stored.**
  Ask any vendor what happens to those gifts in a move.

Email and outreach

3 ITEMS

- [ ] **20. Pull the hard bounce rate on your last three fundraising emails.**
  On one World Hope email, 11,997 of 22,000 records bounced.

- [ ] **21. Compare that count to the same campaign a year earlier.**
  World Hope's was identical, which meant half its outreach had been failing for at least a year with nothing surfacing it.

- [ ] **22. Check whether your staff can build their own lists and queries.**

People and the decision

4 ITEMS

- [ ] **23. Name the person who owns the decision and the person who will own the system afterward.**
  They are often different people, and a move with no named owner stalls.

- [ ] **24. Mark the months your team cannot test a new system.**
  For most fundraising teams that is the last quarter of the year.

- [ ] **25. List the processes you would keep exactly as they are and the ones you would change if you could.**

- [ ] **26. Decide whether you want to rethink how you work or want a system that works one way out of the box.**
  Both are fair answers. They point to different products.

What the answers tell you

If most of your answers are short and nothing surprised you, your current system may be serving you, and the better move may be to stay.

If the answers took weeks to find, or nobody could find them, that is the finding. Bring it to every vendor you talk to and ask each one to show you how their system would handle your numbers, not a demo account.

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