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Donorfy Professional

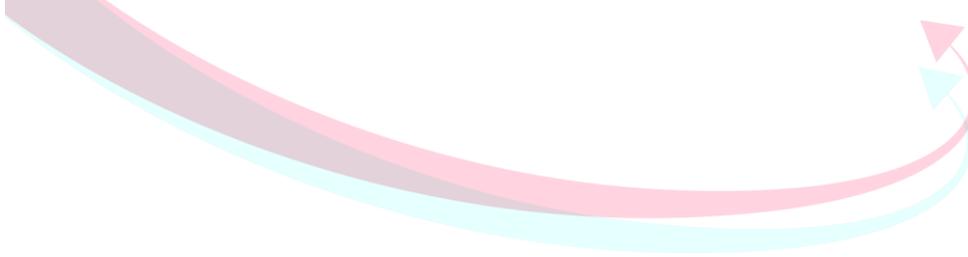# FlightPath

Service Overview

Together we'll land this implementation

Contents

By the end of this document, you'll be well-prepared to choose the FlightPath that best suits your needs.

> *We believe wholeheartedly that the functionality that our software offers our customers is very important, but it is only half of the value equation. How the system is rolled out is critical if full value from your new investment is to be achieved.*
>
> **Fabrice Dreneau, Chief Customer Success Officer, Access Group**

About

Each FlightPath implementation programme from Access follows a well-defined journey. Our aim is to give you value from your investment as quickly and as fully as possible. Using our years of software deployment expertise, we have defined the FlightPath methodology.

Typical Questions ?

- How can we ensure a successful outcome?
- How quickly will we get a return on investment?
- How quickly will my colleagues adopt the new software?
- How will I be supported?

Our Response ✓

Our FlightPath methodology means we:

- Clearly define the outcomes for each stage of your implementation through to early adoption
- Put the software in your hands at the earliest opportunity with a learn as you use approach
- Supply e-learning materials to share with your colleagues
- Provide a named onboarder who will guide you through key milestones and track issues and actions through our Customer Success portal

Our Commitment 💎

We will:

- Ensure that roles and responsibilities are completely clear
- Be transparent on your effort commitment
- Set expectations on project duration
- Remain by your side until your FlightPath Outcomes have been achieved

Donorfy Professional
FlightPath A Overview

Customer Profile:

A FlightPath for customers with up to 30,000 constituents in their database, or those setting up their first fundraising CRM.

FlightPath Outcomes
Following your FlightPath, you will:

- ✓ Have registered for our support community portal
- ✓ Have accessed and configured your reporting dashboards in Donorfy
- ✓ Have your constituent data migrated to Donorfy
- ✓ Have connected your website to Donorfy for capturing sign-ups and donations
- ✓ Have completed your go-live survey

Customer effort:
A typical FlightPath requires 32 hours effort from your team to go live with your new system.

Average Duration
70% of our customers go live with their system within 12 weeks.

Optimal Duration
Customers with the capacity to complete their activities quickly take as little as 8 weeks from purchase to go-live.

FlightPath Experience
This is an Onboarder led experience. Your onboarder will deliver training and configuration sessions guiding you through your go-live activities. You will be required to gather and provide your data and complete configuration tasks based on training delivered. *

* Refer to the Service Summary slide for a detailed breakdown of your FlightPath

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FlightPath B Overview

Customer Profile:
A FlightPath for customers with between 30,000 and 150,000 constituents in their database.

FlightPath Outcomes
Following your FlightPath, you will:

- ✓ Have registered for our support community portal
- ✓ Have your constituent data migrated to Donorfy
- ✓ Have connected your website to Donorfy for capturing sign-ups and donations
- ✓ Have accessed and configured your reporting dashboards in Donorfy
- ✓ Have completed your go-live survey

Customer effort:
A typical FlightPath requires 50 hours effort from your team to go live with your new system.

Average Duration
70% of our customers go live with their system within 16 weeks.

Optimal Duration
Customers with the capacity to complete their activities quickly take as little as 10 weeks from purchase to go-live.

FlightPath Experience
This is an Onboarder led experience. Your onboarder will deliver training and configuration sessions guiding you through your go-live activities. You will be required to gather and provide your data and complete configuration tasks based on training delivered. *

* Refer to the Service Summary slide for a detailed breakdown of your FlightPath

Each of our Flightpath Packages delivers a tailored set of system functionalities, strategically crafted to align with your business needs and drive impact.

Product features included in FlightPath for Donorfy Professional			
Feature	Summary	FlightPath A	FlightPath B
Supporter Management	Centralised CRM for donors, members, and volunteers with full interaction history, donation tracking, and segmentation tools.	●	●
Campaign & Event Tools	Create and manage fundraising campaigns and events with real-time data syncing and performance tracking.	●	●
Automated Gift Aid	Automatically process Gift Aid claims to save time and maximise income recovery.	●	●
Integrated Payments	Supports Stripe, GoCardless, and other platforms for flexible donation and membership payments.	●	●
Email Marketing Integration	Connects with Dotdigital and Mailchimp for personalised, segmented email campaigns directly from Donorfy.	●	●
Custom Forms & Widgets	Capture supporter data via embeddable forms for donations, memberships, and volunteer sign-ups.	●	●
Advanced Reporting & Dashboards	Visualise key metrics with customisable dashboards and access advanced reporting via the Data API.	●	●
Membership Management	Track member details, renewals, and payments with tools tailored for subscription-based fundraising.	●	●
Major Donor & Trust Fundraising	Manage complex donor relationships and grant applications using the Opportunities and Trust Info features.	●	●
Constituent Segmentation	Use custom fields, roles, and types to categorise and analyse supporters for targeted engagement.	●	●
Task & Workflow Automation	Assign tasks, set reminders, and automate admin processes to streamline team operations.	●	●
Finance & Accounting Tools	Extract financial data for reporting and integrate with accounting systems for seamless reconciliation.	●	●
Security & Compliance	ISO 27001 and 9001 certified, ensuring data protection and regulatory compliance.	●	●
Self-Service Preferences	Enable supporters to manage their contact preferences via linked email systems and web widgets.	●	●
Scalable Configuration	Customise settings, activity types, and constituent structures to suit your organisation's evolving needs.	●	●

Each of our Flightpath Packages offers a curated suite of outcome-driven services, expertly designed to deliver the fastest possible return on investment (ROI).

Implementation Services Included in FlightPath for Donorfy Professional

Service	Summary	FlightPath A	FlightPath B
Welcome Call	Introduction call to provide an overview of the FlightPath implementation, discuss project timeframes, roles and responsibilities, and next steps. We will also review the migration template you will be required to complete.	●	●
The Donorfy Academy	Access on-demand and live training sessions; covering all areas of Donorfy.	●	●
Data Review	We will review your data with you to ensure the data is prepared for migration.	●	●
Pre-configuration Data Review	Following the data review, we will ensure your data is configurable in Donorfy to ensure successful configuration.		●
Donorfy Configuration	We will show you how to set up Donorfy based on your data and future needs.	1 session	2 sessions
Opportunity and/or Membership Configuration	We will complete extra configuration based on your needs.		●
Feedback & Data Cleaning	We will send you actions and ensure data is ready for migration - matching the configuration.	●	●
Sample Data Migration & Validation	We will upload a sample of your data into Donorfy and check the sample data migration against the configuration and data supplied.		●
Complete Data Migration & Validation	We will upload your data into Donorfy and check the data migration against the configuration and data supplied.	●	●
Integrations & Forms	We will set up the standard integrations and forms with you (e.g. donation, event sign-up).	●	●
Lists & Auto Tags	We will discuss how to query your data and segment your audience based on your needs.		●
Financial Reconciliation & Go-Live	We will confirm validation from you and run through financial reconciliation before you go live with Donorfy.	●	●
Post Go-Live Support	Support from your consultant to address any initial queries following your go-live.	●	●
Supported System Adoption	Your consultant will monitor and proactively support you through your post go-live journey, ensuring you have successfully adopted your system in line with your FlightPath outcomes.	●	●

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Alongside our standard FlightPath packages, we offer value-added services provided by our expert consulting teams. Explore how we can further support your success.

Additional Services Available

Please refer to the Service Catalogue for more information.

Additional Constituent Migration — We will migrate data over and above the volume advertised for your FlightPath.