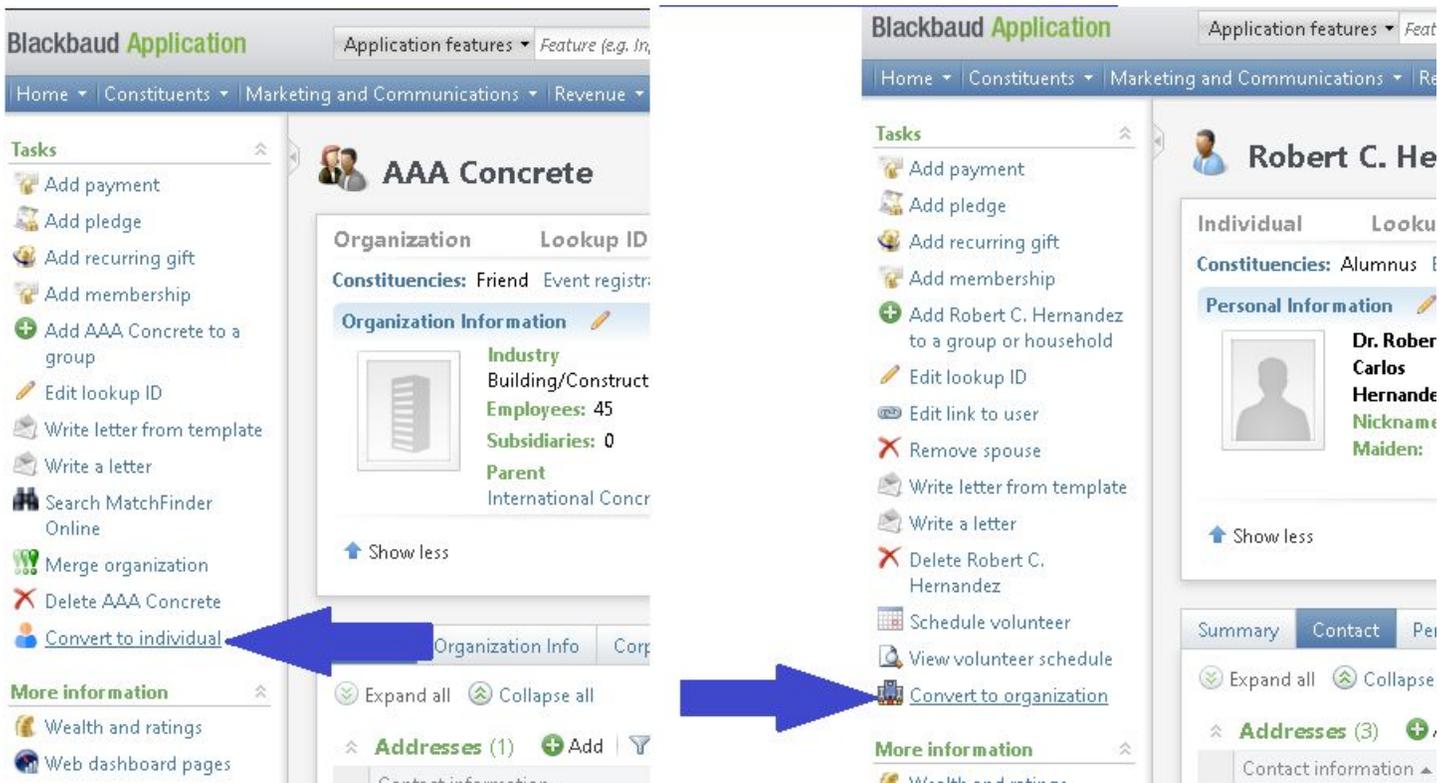# Individualization

Product Overview

Individualization enhances Blackbaud CRM with the ability to change individuals into organizations, and vice-versa. In doing this, it resolves the #1 rated customer suggestion in the Blackbaud Idea Bank.

Instant, Reversible, and Lossless

Converting takes less than a second, even for complex data scenarios.   Change a constituent's organization status by accident? Don't worry - you can instantly toggle the constituent back with no harm done.   And speaking of reversal, don't worry about data loss - data that depends on the constituent type (like number of employees, for example) is safely preserved in case you want to switch back.

Clean up the mess

Do you have legacy data that is wrongly encoded? Individualization includes two Global Changes, which can target an entire selection of constituents, and magically turn them all into organizations or individuals.   Clean up data conversion issues that have been there in years - in just a few seconds.

Custom Constituency Rules

Enforce the constituency policies and practices of your organization automatically with constituency rules. Easily create rules that are automatically applied whenever you use the conversion feature. Review and change the rules in an easy-to-use interface.

Individualization Constituency Rules

Organization to Individual (3) ⊕ Add

	Constituency	Action to take	Change to	Active	System	Execution or...
⊗	Former organization	Create it		✓		1
⊗	Corporation	End date it		✓		2
⊗	Trustee	Replace it with a different constituency	Board member	✓		3

Individual to Organization (4) ⊕ Add

	Constituency	Action to take	Change to	Active	System	Execution or...
⊗	Former individual	Create it		✓		1
⊗	Board member	Replace it with a different constituency	Trustee	✓	✓	2
⊗	Grandparent	Delete it		✓		3
⊗	Employee	Replace it with a different constituency	Former individual	✓		4

Edit rule: Organizations becoming Individuals ☒

For this constituency: Corporation ▼

Take this action: Replace it with a different constituency ▼

New constituency: Former organization ▼

☑ Create reverse rule for orgs to individuals

[Save] [Cancel]

Read more

[Check out the documentation](#), and, when you're ready, [purchase Individualization](#) for **your** organization.