Using Technology

as STRATEGY

a guide

USING TECHNOLOGY AS STRATEGY GUIDE

What is included in this guide?

This guide will dive into these main areas of using Technology as Strategy:

1. Introduction to Technology as Strategy
2. Readiness
3. Data Documentation
4. Planning
5. Needs Assessment
6. Implementation

Print the guide out and work with your staff to fill out each section.

Acknowledgments

This guide is based off of a presentation done by thedatabank, gbc & MAP for Nonprofits called "Technology as Strategy Workshop", and a presentation by Tom Lehman titled "Technology as Strategy". The content and worksheets in this guide were created in part by:

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What does it mean to use Technology as Strategy?

Using Technology as Strategy is all about possibilities. It doesn't just look at your technology as an office supply to help your staff meet the needs of their jobs, but it also asks you to think about what you *could* be achieving by using technology strategically to meet your mission goals.

Technology as Strategy puts technology in the same category as people (human resources) and money (capital); all have power to differentiate the organization and steer its course. And all of these resources are intertwined.

Think about it like this:

Without Technology as Strategy - You need a new database because it isn't meeting your organizational needs. It is clunky, cumbersome, and staff don't like it. You need more ability to create your own donation forms and make email templates.

With Technology as Strategy - You need a new database for all of the reasons above, and with the ability to create your own donation forms and email templates you are able to do two more online fundraising campaigns a year, which will help your organization raise 2x more to fund X program. This program will service X number of new clients.

READINESS

Instructions:

Use the checklist below to determine if your organization is in a place to begin looking at Technology as Strategy. **Yes** answers mean you are ready to move forward with using Technology as Strategy. **No** answers indicate areas that might prevent you from effective planning and implementation.

If you have mostly No answers, don't be discouraged! We have a Needs Assessment sheet on pages 6 & 7 to help you explore the ways that you can use Technology as Strategy and share the potential value with key stakeholders.

Questions:

Yes   No

☐   ☐   1. Do you have an organizational strategic plan?

☐   ☐   2. Do you have a technology plan?

☐   ☐   3. Are both leaders and staff involved in technology decisions? (vs. IT staff/provider deciding?)

☐   ☐   4. Are board members supportive of technology needs?

☐   ☐   5. Are funds budgeted for replacements and upgrades?

☐   ☐   6. Has technology been used to improve services?

☐   ☐   7. Do staff have a positive attitude towards technology?

☐   ☐   8. Does your organization's culture support learning and experimentation?

DATA DOCUMENTATION

Instructions:

Before you begin assessing what using your Technology as Strategy might look like, it is important to know what tools and data you currently have at your organization. Not only is it important for strategic purposes, it can help prevent data/efficiency loss in the event of staff transitions.

Use this worksheet to help document all of your tools and data sources. Data sources can include locations such as excel files, your current database/CRM, mailing lists, etc.

Data Source	Name of File	File Owner	How Data Supports Mission
Excel Document	MonthlyDonors.csv	Jane Smith	Sustaining donors fund our Plant Education program, which is core to our mission

Printable sheets on pages 10 & 11

PLANNING

Instructions:

Finish the statement below. Once you've filled it in, answer the questions following it to explore how you can strategically use technology to achieve this.

Statement:

It would be amazing if our organization could...

Questions:

1. How could we use our current technology more effectively to achieve this goal?

2. What new technology could we explore to help achieve this goal?

3. What makes our organization different from the other 1.5 million nonprofits out there? How do we market those differences?

4. What technologies could we use to help our organization stand out?

NEEDS ASSESSMENT

Instructions:

If after you go through your technology goals you decide you need new tools to achieve these goals using Technology as Strategy, use this document to help your organization better understand your needs and priorities.

Questions:

1. What is the mission of your organization?

2. What organizational goals are you trying to achieve with new technology?

3. How do you measure the results and impact of your organization?

4. What challenges are you currently experiencing that keep you from achieving your goals? List in order of greatest to least impact on your organization.

Questions continued:

5. What resources are you using in an effort to reach these goals? (e.g. specific technology systems, staff time, vendor services, etc.)

6. What are the costs for these resources?

7. What opportunities are lost due to your current challenges? What else could you do if these problems were solved? (e.g. # of additional clients served, $ amount of additional funds raised, etc.)

8. What is the impact to your organization and your community when you don't reach your goals?

IMPLEMENTATION

Instructions:

Your success with using Technology as Strategy will depend on organizational culture, change management, and available resources. Keep that in mind as you answer the following questions.

Questions:

1. What are some barriers to embracing Technology as Strategy in your organization, and how might you overcome them?

2. What are some strengths to embracing Technology as Strategy in your organization, and how might you use them?

3. What is one thing you could do immediately to move in a positive direction?

Who is thedatabank, gbc?

thedatabank, gbc's strategic CRM solutions focus on your unique challenges for impact you can measure. We craft custom software solutions that help your nonprofit or social sector organization overcome its information challenges and accomplish its mission.

We Are More Than Just Software

Passion: Our passion for progressive change makes us your ally as well as your solution provider.

Experience: We've been creating CRM software since 1998. Two decades of innovation testifies to our ability to bring creative, thoughtful, real solutions to your needs.

Service: Our commitment to service is the most frequent compliment we get from clients - we have a client support satisfaction rating of 99.5%. We know service is crucial to your successful use of technology.

How do I get in touch?

We would love to begin a conversation with you about how we can help craft a technology solution for your organization that fits with your organization's goals.

Visit our website:
www.thedatabank.com/schedule-a-free-consultation

Call: 1-877-603-0296 (toll-free) or 612-455-2255
Email: info@thedatabank.com

DATA INVENTORY

Data Source	Name of File	File Owner	How Data Supports the Mission

DATA INVENTORY

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