NONPROFIT TECHNOLOGY CONSULTING:

06

STEPS TO SUCCESS

DNL OMNI MEDIA

NONPROFIT TECHNOLOGY CONSULTING:
6 STEPS TO SUCCESS

Your nonprofit undoubtedly relies on software to accomplish all of your many goals, from bringing in those valuable fundraising dollars to connecting with constituents and much more. The question is: are you getting all that you could be from your technology strategy?

If you're not sure, calling in the help of a reliable nonprofit technology consulting firm could be the best move for your organization. **Nonprofit technology consultants (also known as nonprofit IT consultants) are experts in the nonprofit software solutions that power your mission.** They can help you assess your operations and develop strategic improvements that can bring a boost to your organization's efforts.

If you've never worked with a consultant before, it might be hard to figure out what exactly their services can mean for your organization. In this post, we'll walk you through what to expect when working with a nonprofit technology consulting firm (like Team DNL!):

1. Envision your strategy.
2. Plan your implementation.
3. Build out your solution.
4. Stabilize your solution.
5. Deploy your solution.
6. Maintain your solution over time.

Though these won't be the steps every consultant takes, our points should give you a solid idea of what to expect from a nonprofit technology consulting firm. Let's jump into the first step!

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STEP 1. ENVISION YOUR STRATEGY

Before you can start purchasing new tools and configuring software, you'll need to work with your consulting firm to determine where you are and where you want to go using technology.

At the very beginning of your engagement, your nonprofit technology consultant should work with you to get an understanding of your nonprofit's operations. You'll likely need to answer questions such as:

- What technology solutions are you currently using?
- What fundraising practices are key to your strategy?
- How clean and up-to-date is your supporter data?
- Who uses your software on a regular basis?

Once your consultant has an idea of your current strategy, you can start brainstorming goals and areas for improvement. It's okay if your ideas are still relatively abstract at this point; your consulting team can take far-out goals and provide more concrete options for technology solutions.

However, you should make sure your team is on the same page and able to come together for a shared vision when it comes to:

- Fundraising goals. How much do you want to raise in the next year? How much of an improvement do you want to see over last year's results?
- Fundraising methods. Keeping your current tactics in mind, what channels do you plan to use to bring in your fundraising goals? Online giving, mobile giving, fundraising events, peer-to-peer fundraisers, or another method entirely?
- Outreach strategies. What methods will you use to market your nonprofit? What goals do you have to grow your donor base, and how will you measure this growth?
- Technology budget. Considering your current technology costs, how much can you spend on new software, updates, migration, or integrations? How much can you afford to spend on your nonprofit technology consultant?

Together, you and your consulting partner will assess your current practices, ideal outcomes, and project parameters (e.g., timeline, budget, staff availability). Once you've agreed upon a vision for your nonprofit, it's time to put ideas into motion and get to planning!

Bonus! Eager to get started finding your consultant? Check out Double the Donation's list of the top nonprofit technology consultants in the business. They've reviewed each firm so you can quickly find a partner who can turn your vision into a reality.

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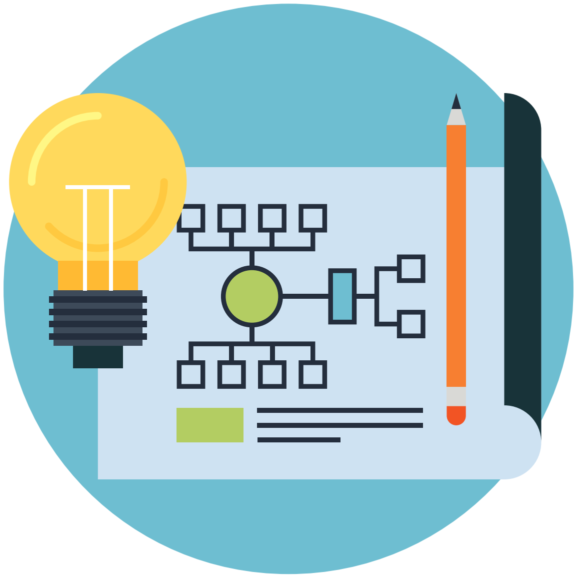
STEP 2. PLAN YOUR IMPLEMENTATION

An abstract goal is a great place to start, but to see your vision come to life, you'll need a strategic plan with actionable steps to get your technology implementation underway.



During the planning phase of your nonprofit technology consulting partnership, you'll work together with your consultant to establish a clear path toward implementation. This includes:

- Requirements gathering. What exactly do you want your technology to do for your organization? Since you've already determined what processes are most important to your operations, you should be able to put that knowledge to practical use as you set requirements for your software.

- Setting short- and long-term goals. Where do you see your technology use taking you in the next 6-12 months? How do you see your technology needs evolving over the next 2-5 years? Developing a clear map for the future now can help you create tangible benchmarks to keep you on track down the road.

- Defining responsible parties and delegating tasks. How much of the implementation will be managed by your consulting team? Who on your staff will take the lead on cleaning up data, documenting processes, or coordinating with your vendor? Getting your staff on the same page in terms of responsibilities will ensure no vital tasks slip through the cracks.

- Establishing an implementation timeline. When will you go live with your technology? How will you phase out the launch? Will you condense training into a short window or spread it out over a longer time period? Setting a concrete time frame for the next phases of implementation can help you stay focused and on target.

Of course, you should anticipate that your nonprofit will veer from the plan at least once or twice throughout the implementation process. You might work ahead of schedule, or unforeseen circumstances might throw you off track. **Even if you don't follow your established plan down to the letter, the more steps you have mapped out beforehand, the more focused your implementation will be.**

When you don't have a clearly thought-out recipe for success in front of you, your team is likely to become distracted by new possibilities or concerns, spend too much time addressing low-priority issues, or leaving important tasks undone. Fortunately, a nonprofit IT consultant will have plenty of experience keeping nonprofits on track, so they should help you create and follow your plan as closely as possible.

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STEP 3. BUILD OUT YOUR SOLUTION

You've put in the "pre-work," and now it's time to get into the fun part—actually working with your consultant to build out your technology solution!

Depending on the scale and sophistication of the project, your consultant might be responsible for any number of tasks during this phase. Typically, the building phase follows a few key steps:

- Design. Using your goals and requirements as a guide, the consultant will design a solution that fits your needs. This might mean setting CRM configurations, developing a website customization, or planning out an integration strategy. You'll work with the consultant to ensure their proposed solution fits into your operations and strategy.

- **Develop.** After mocking up a solution, the consulant will put their plan into action by actually building out the development or customizing an existing system.

- **Migrate.** Once the new solution is ready to use, you'll need to get all of your existing data effectively transfered to it. Data migration can be a lengthy process, so you may consider setting a separate migration timeline and appointing a data manager from your team to take the lead on this part of your implementation project.

- **Implement.** With your development finalized and your data in place, your nonprofit is (almost!) ready for launch. At this point in the process, your solution is set up and able to be tested and eventually used.

The timeline for this phase of the project will vary greatly depending on your organization's vision.

For example, if your implementation entails customizing an out-of-the-box fundraising software solution (think: Raiser's Edge from Blackbaud), your consultant may have enough expertise to know roughly what configurations are most likely to benefit your goals. The design and development process should be relatively swift, and implementation will be relatively straightforward.

On the other hand, if you're using a highly customizable, enterprise-level CRM (think: Salesforce for Nonprofits) and want to build out a totally unique fundraising and donor management system made up of a handful of integrations and dozens of configurations, design, development, and migration might be much more complex, leading to a lengthier implementation timeline overall.

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STEP 4. STABILIZE YOUR SOLUTION

Your solution is built, but your time with your nonprofit technology consultant hasn't come to an end yet. Before you can officially roll out your new system, your consultant will need to make sure your technology is implemented correctly and ready for staff use.

The stabilization phase of your implementation depends on testing and troubleshooting your software to ensure successful usability. To do that, your nonprofit and your consultant may:

- Start a user testing group. Choose a few team members representing various departments to try out your new tools. Have them complete a set of basic tasks first, and then work up to using the software to complete their typical responsibilities.

- Check that data flows correctly. Particularly if you're integrating several systems, it's important to verify that your data is correctly placed into the appropriate fields whenever a form is completed or a data transfer is initiated.

- Troubleshoot issues. If you do encounter errors in your technology, work with your consultant to determine the source of the issue and implement a solution. This may also mean working with your staff to establish foundational best practices for using the software.

Diving into your new solution without taking the time to properly test it can lead to complications with your software and major frustrations with your team, so don't skip over this step! When your solution is on-target from the beginning, you'll set your team up for optimum success with their new software.

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STEP 5. DEPLOY YOUR SOLUTION

Once you've determined that your solution is ready to go, there's only one thing to do: push it live!

Depending on the scope of your solution, the complexity of the technology, and the number of team members using it, you may implement your solution across your organization all at once or roll it out over a set time period.

But whether you're implementing your solution for 5 users or 5,000, your nonprofit will need to have a plan for:

- Communication. Your nonprofit's implementation manager (or another key leader) should be responsible for communicating the technology change to your staff, answering questions that arise before and during deployment, and documenting major steps in the transition.

- Training. You certainly can't maximize technology that your staff can't use! Your vendor may provide some level of training, but for best results, continue working with a nonprofit technology firm who understands your specific needs and create a custom training plan to help you achieve your goals.

- Feedback. Once you have a wide user base operating within the solution every day, there are bound to be new challenges or concerns that crop up. How will you collect and address feedback from your users, and who will be in charge of coordinating solutions for any new problems that occur?

It's important that your nonprofit leadership works with your consulting team to get your staff all on the same page and excited about your new solution. Make sure you frame the transition as an opportunity for growth at your organization, and be open to addressing any questions that your team has.

Remember that software implementation is a collaborative process. If your team isn't all working together to maximize your software, you may inadvertently gloss over areas that could enhance your technology strategy.

Bonus! Nonprofits using Blackbaud software may wonder what training path is right for them after they implement their technology. Should you use a consultant, a Blackbaud training plan, or online resources? Rather than wade through all the options yourself, check out our comprehensive list of the best training solutions for Blackbaud users.

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STEP 6. MAINTAIN YOUR SOLUTION OVER TIME

There's no point in spending all of your time implementing software if you don't put it to good use! Following implementation, you and your consultant should continue to work together to ensure a smooth software experience for many years to come.

Depending on your project, your consultant might continue to be involved in varying capacities at your organization. It's important to set up parameters for the engagement from the beginning; that way, you won't end up with a technology partner that's significantly more or less hands-on than you'd like.

However, unlike with [general fundraising consultants](), you should plan for your IT consultant to remain a part of your nonprofit after the initial implementation project implementation concludes to continue providing a few key services:

- Support. If you’ve implemented custom configurations or integrations, you may run into challenges that your vendor’s support team doesn’t have the expertise to manage. Make sure you have a plan for how your consultant will support you if you experience any problems with the solution they’ve set up.

- Campaign or data management. You may need additional guidance as you run fundraising campaigns and collect supporter data, and your nonprofit technology consultant can help! For larger solutions (like CRMs or nonprofit websites), your consultant can also stay on in an administrative role, either in-house or remotely.

- Ongoing development. Post-implementation, you should have a near-perfect solution at your fingertips, but that doesn’t mean it will remain the perfect solution forever. As your nonprofit grows and takes on new types of initiatives, you may need to add more integrations, reconfigure your software, or switch to an entirely new platform. Your consultant should be around to assist with any and all of those endeavors.

Before you wrap up your initial engagement with your IT consulting firm, it’s also important that you work together to develop documentation for all of the processes you’ve established. That way, if you do run into questions or challenges, you’ll have a written resource to reference as well.

Partnering with a knowledgeable nonprofit technology consultant can help your nonprofit with much more than just the technical aspects of software implementation. Your consultant can be your educator, advocate, and expert resource in almost every aspect of your technology strategy.

For more on nonprofit technology, check out these additional resources:

- Raiser's Edge vs. Salesforce for Nonprofits. Not sure if you should search for a Blackbaud partner or a Salesforce consultant? Read our comprehensive review of both software solutions to get a better understanding of how these systems can impact your nonprofit.

- Blackbaud CRM: 5 Essentials to Know Before Implementation. If Blackbaud's enterprise-level CRM solution has caught your eye, make sure you're prepared to implement this powerful tool. Our guide can walk you through the basics of Blackbaud CRM (and much more) so you get started on the right foot.

- Luminate Online Marketing: The Nonprofit's Guide. At Team DNL, we're experts on Blackbaud's Luminate suite—and we want you to be too! Learn the ins and outs of the Luminate toolkit to find out if these products are the right ones to enhance your fundraising.