A practical framework for building Your perfect tech stack

TUESDAY AT NOON | FACILITATOR: PAUL KEOGAN, BACKOFFICE THINKING

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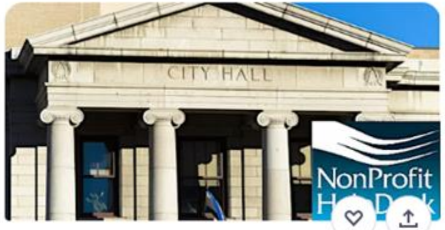

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NYC Council Discretionary Funding Q&A w/ NYC Dept of Youth & Community Dev.
Wed, May 28 • 6:30 PM EDT
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Submitting the HHS Prequalification (PQL) Application
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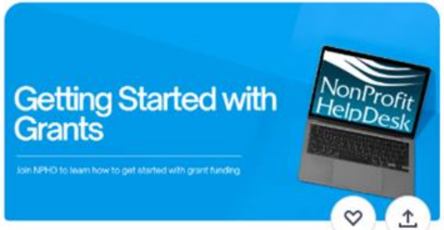

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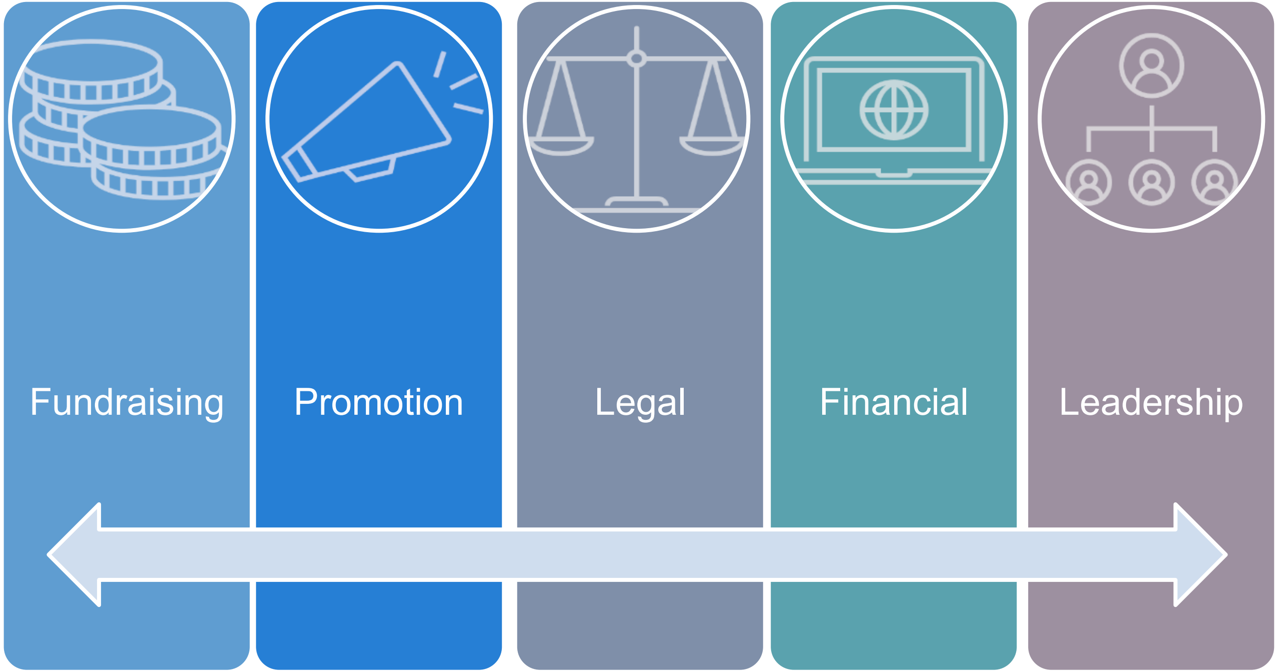


“Our Tech Sucks”

- This is what I hear all the time
- We’re here for therapy
- But were mostly here to give you a path to success

Trust your Gut

Your intuition is important

- Are you seeing staff morale issues - good people may become frustrated, then complacent.
- Is your organization more efficient than 5 years ago, the same, or less?
- Are you getting better data insights than 5 years ago, the same, or less?
- Do you feel technology is preventing your organization from scaling and growing.

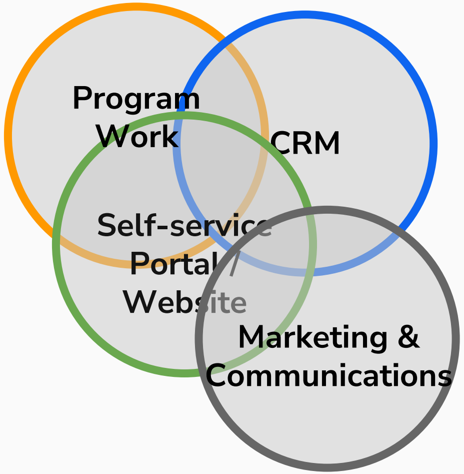
Technology should be a strong enabler of success

Today's Agenda

- **Quick Review: Nonprofit Technology Evolution**
  - Where are you now?
  - What's changed in the non-profit tech landscape?

- **A practical framework for building Your perfect tech stack**
  - Assess and Address your Tech: The six steps.

What's Changed In Nonprofit Tech?



Past

Integration, automation, and shared understanding considered less important; pulling data into spreadsheets was the norm

Today

This is no longer true, with rise of portals, personalization, the need for greater efficiency, instant access, etc

How does this feel different?

a "Old tech stack"...

Optimized for...	office / desktop
Information is...	single-purpose
Access is...	exclusive
Work happens...	outside the system
Exploration requires...	technical expertise

a "Perfect tech stack"...

Optimized for...	mobile
Information is...	integrated
Access is...	shared
Work happens...	within the system
Exploration requires...	curiosity

Assess and Address your Tech

INTERNAL STEPS

1. Discovery (Prepare)

Who are we?
What should change?

2. Analyze (Current Situation)

Symptoms, B&T Inventory,
Systems Diagram, Interviews
Key Outcomes

3. Requirements

Feature Requirements
User Stories

EXTERNAL STEPS

4. Market Evaluation

Prepare, Conduct,
Evaluate, Choose

5. Deployment (Implement)

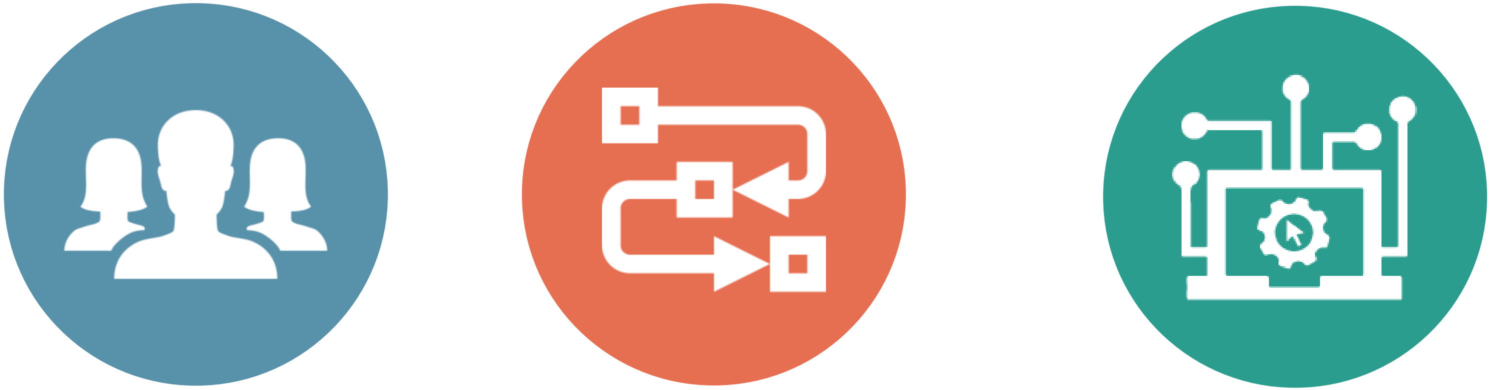
Define KPIs (Goals), Plan,
Change Management,
Execution/Validation

6. Optimization & ROI

Measure KPIs
Have you changed?
Improvements

Discovery: How to think about assessing your technology

People | Process | Technology

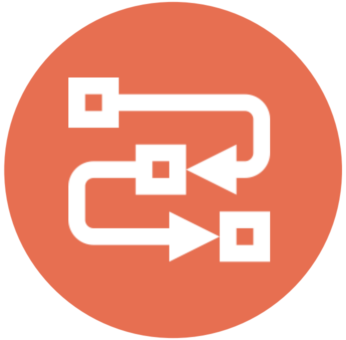


Then | Then

Discovery: How to think about assessing your technology

People

Process



Consider your current situation

- Do you have teams for Development, Marketing? Or a single person
- How skilled or how much time do people have to utilize advanced tools
- How large/ complex is your data?

What can change:

- Can you see your people or processes changing?
- Are people frustrated? Do they try to make changes?
- Be care of -- I would make changes but I don’t have enough time

Discovery: How to think about assessing your technology

Technology

There is no right solution, but there are wrong ones

- Match your technology with your People and Processes
- Be realistic about changing technology, its hard and the grass isn't always greener
- Maybe some data help, process improvements, and coaching is best

Analyze: Where are you struggling?

- **Does your organization have some of these issues?**
  - **Data Silos:** You have too many versions, too many lists, and no "single source of truth".
  - **Manual Processes:** Your staff spend time manually exporting/importing data or compiling reports instead of focusing on analysis and insights. (*Too many spreadsheets*)
  - **"Making Do":** You are repurposing tools for things they weren't meant to do (e.g., using an e-commerce cart for donations).
  - **Inability to Scale:** You can't add new features like mobile donations or member portals without breaking the system.
  - **People are frustrated or maybe given up:** Difficult to motivate your team and keep good people

Your technology should be an engine for growth, not a weight that causes your organization to sputter and stall

Analyze: Does any of this sound like you?

- Let's assume you are here because you have some symptoms

- Before finding a solution, let's do some diagnosis

- Key items:
  - Develop a business and Technical inventory
  - Create your systems diagram
  - Interview key staff and constituents
  - Analyze based on the People, Process, then technology framework
  - Conclude with key recommendations

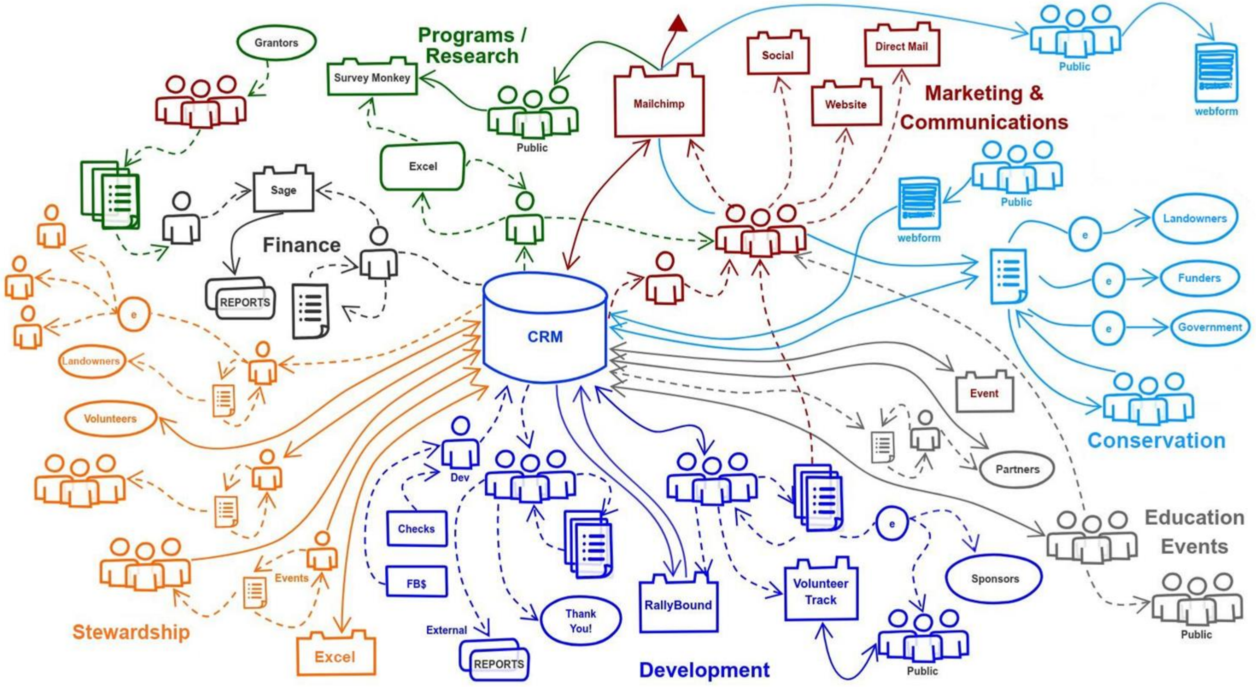
Analyze: Business and Technical Inventory

A	B	C	D	E
System Name	**Primary Dept.**	**Data Type**	**# of Records**	**Main Purpose**
Mail Chimp	Marketing	Contacts, email addresses	16,000	Email marketing, communications, announcements
Galaxy	Guest Services, Membership	Contacts, transactions, memberships, attendance	3610	Processing and managing Admissions, Membership, Class Sales
DonorPerfect	Fundraising	Contacts, transactions, grants, proposals	5,200	Tracking all development dept. activities
Aceware	Education	Classes, student contacts	13,500	Managing education programs -- attendance, assignments, credentials
Excel - Volunteers	Volunteers	Contacts, email addresses, phone	116	Volunteer Inquiries & Communications
Excel - Neighbor list	Neighbor list	Contacts, email addresses, mailing address, phone	400	Neighbor Announcements & Communications
Excel - Media List	Media List	Contacts, email addresses, phone	21	Media Releases & Announcements

Some key items

- Renewal date /cost
- What drives the cost
- Does/Can it integrate

Analyze: Draw your system



Some key items

- If you can't draw it, you don't understand it
- Are people involved in most data transfer?
- Are spreadsheets everywhere?

Analyze: Key Interviews

Interview key groups and individuals:

- 60 minutes, Send questions
- Responsibilities, key metrics:
- Team size, frequent collaborators:
- Tools Used:
- What's working well?:
- What's *not* working well?:
- What's the problem?

Ask Probing questions

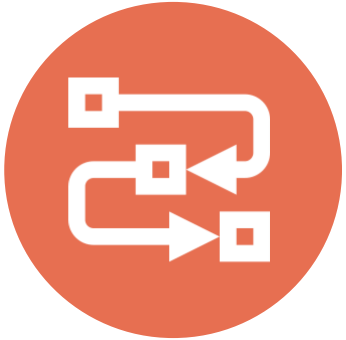
- Why do you do it that way?
- Why is that a problem?
- What have you tried?
- What's getting in the way?
- What went wrong?
- What impact does that have?

Analyze: People & Process

Example:

People

Process



What's good:

- **Commitment** to mission
- **Enthusiastic** about growing impact

But:

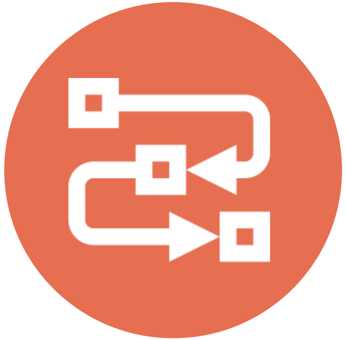
- Too much time on **manual processes**
- **Lack of documentation**
- **More time spent managing information** than deriving actionable insights
- Can't see a way to improve

Analyze: Technology & Process

Example:

Technology

Process



- **Overall technology architecture is solid**
  - A CRM is at the center
- **What you've built (sorta) works:** Smart people can do a lot
  - But, it's complicated and confusing
  - Resigned to having issues and frustration
- **Data management gaps & no *real* integration**
  - Over-reliance on manual processes - exports and manual efforts

Analyze: Conclusions and Key Recommendations

- **Create a CRM Hub for all key constituent data to be utilized across all of the organization**
  - Eliminate as many manual processes as possible, have true integrations
  - Automate as much as possible (multistep, “if this....do that”)
  - Make the CRM a tool for all (executive Dashboards, constituent management, work in the system)
  - Utilize advanced fundraising tools
  - *This will increase efficiency, will allow data-driven decisions, and enable workflows and automations to benefit all departments across the organization.*

- **Evaluate replacing CRM**
  - Keep all other software tools (at least for now)

- **Improve Systems Governance / Documentation / Ownership**
  - Lack of documentation and processes creates inefficiencies and governance concerns

Example:

Start Evaluation

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Measure KPIs
Have you changed?
Improvements

NEON ONE

Humanitru

tessitura NETWORK

JustGiving™

Little Green Light

Bonterra™

giveffect

virtuous

donorperfect

DonorDock

keela Powered by Velora

blackbaud® Raiser's Edge NXT™

Givebutter

CharityEngine

gofundme PRO™

donately

Altru®

NETSUITE

HubSpot

salesforce

DONORVIEW

ClearView CRM

eTapestry®

bloomerang

CIVICRM

Market Evaluation: Feature Requirements

	A	B	C	D
1	**Feature**	**Description**	**Currently Use**	**Priority Level**
2	**Donation Management**			
3	Process online contributions (credit cards)	donor page(s) with giving amounts	Y	Required
4	Process recurring donations	Provide flexible amounts and at least monthly and annual.	Y	Required
5	Automated email receipts	Customizable receipt. One format for all gifts.	Y	Required
6	Failed payment notice for recurring gifts	Notify donor & admin when recurring payment fails	N	Required
7	Update payment information	Admin can update payment information for recurring donations.	Y	Required
8	Update recurring gift amount	Admin can change the amount of a recurring gift.	Y	Required
9	Self service recurring management	Donor can make those updates via web portal	N	Optional
10	Automatic card data updates	Automatically update cards when new expiration date is applied.	N	Optional
11	Create donation campaigns and track gifts from forms	Track donations for specific campaigns or other targeted offerings	Y	Required
12	Offer items based on donation level (premiums)	Donor can select from available options online	Y	Required
13	**Donor Tracking**			
14	Giving history reports	Report by household or constituent	Y	Required
15	Donation status / moves management	track donation pipeline	Y	Required

Market Evaluation: User Stories

"As a ____________...

...I need to

_____________...

...in order to

________."

"As a **Recurring Donor**...

...I need to **receive a year-end summary** of my total giving...

...in order to **properly file my taxes**."

"As a **Development Associate...**

...I need to **report on the total annual gifts from our recurring donors** ...

...in order to **send thank you letters and tax receipts**."

Market Evaluation: Prep Vendor for the demo

- **To get a CRM demo that actually feels relevant—rather than a generic "features and buttons" tour—you need to set clear boundaries and expectations.**

- **What YOU Should Send the Vendor**
    - The key user stories and features
        - Ask the vendor if they'll do a few "day-in-the-life" examples
    - The must-have checklist
    - Your tech-stack (the diagram)
        - What you want integrated and improved
            - Ask the vendor to address these directly
    - Key: Always allow the vendor to questions - help them prepare

- **What YOU Should Ask the Vendor to Send**
    - Agenda, with time segments
    - Proing and Implementation time

Market Evaluation: Vendor Demos - Beware

Demo Gotchas!!

- favoring buzzwords over real requirements; our system has AI, advanced events, etc.

- getting all your info straight from vendors; talk to references that you find

- treating demos like training sessions;

After Demo Market Evaluation:Evaluate Features

Requirement	Met by [system x]?	Improvement?		
		some	*a lot*	*a ton*
prospect identification	☒			☒
prospect screening	☒			☒
major giving: portfolio management	☒			☒
major giving: actions tracking	☒		☒	
corporate giving / sponsorship / etc	☒		☒	
annual giving: appeals	☒		☒	
donor acknowledgement	☒	☒		
donor recognition	☒		☒	
cc processing	☒	☒		
batch gift entry	☒	☒		
reconciliation	☒		☒	
reporting / metrics	☒			☒

Market Evaluation: It's more than Features

METRICS worst → best ○ → ●	SOLUTION A	SOLUTION B	SOLUTION C
Requirements Met	◑	◕	◕
Standard vs Custom	◑	○	◑
Long Term Cost	◕	◑	◑
Adoption / Ease of Use	◑	○	◕
Implementation Effort	◕	◑	◔
Ecosystem / Extensibility	○	◕	◑
Ongoing Innovation	◑	◑	○
Security	◕	◑	◑
Overall	◕	◔	◑

Deployment/Implementation

5. Deployment (Implement)

Define KPIs (Goals), Plan,
Change Management,
Execution/Validation

Deployment: Define KPIs & Success Metrics

- **Define KPIs & Success Metrics**
  - Before a single button is clicked, you must know what "winning" looks like.
  - Establish Baseline Data: Capture your current performance
    - e.g., It takes 4 days to send a thank you letter
  - Quantify Goals: Define targets
    - e.g., Reduce time to send a thank you note to 2 days; report variances
  - Adoption Metrics: Define what usage looks like:
    - e.g., 75% of the spreadsheets are not needed

Deployment: Planning & Architecture

- **Planning & Architecture**
  - Understand and Map how data will flow (maybe create a future state diagram)
  - Decide what data is being migrated and what is being "purged"
    - don't move "trash" into a new system
  - Resource Allocation: Identify who the key players are:
    - Project Manager, Data Owner, etc.

Deployment: Change Management

- **Change Management**
  - Internal Communication: Keep the team informed on why, how the change is happening
    - Continue to communicate through the implementation
  - Training Programs Create tiered training (Admins vs. End-Users).
  - Feedback Loops: Set up a way for users to report bugs or "clunky" workflows during the transition.

Deployment: Execution and Validation

- **The build-out and the "stress test"**
  - Configuration: Setting up custom fields, workflows, and permissions.
  - UAT (User Acceptance Testing): Have a small group of power users try to "break" the system to find gaps.
    - These tests should be defined upfront with the vendor
  - The Cutover: The actual migration from the old system to the new one.

Vendor Variance: > It is vital to remember that every vendor has a different implementation philosophy/process

Optimization & ROI (Measure)

6. Optimization & ROI

Measure KPIs
Have you changed?
Improvements

Measure: KPIs (The Quantitative)

- **Measure results set against earlier developed targets**
    - Our Example:
        - Did average days to send a thank you letter decrease from 4 to 2?
        - Can we easily report on the outliers?
    - Keep measuring these KPIs
    - Develop new ones
    - Spend more time analyzing your KPIs and driving improvements

Measure: Have you changed (Qualitative)

- **Look for signs of wins / cultural shifts**
  - Ask formally and informally how the team feels about the new system?
    - There will always be some “people” who don’t like change
  - Does the team feel things are similpier? Are they using less work arounds?
    - Note all work arounds for future improvements
  - Do folks have more confidence in the system (without moving to spreadsheets)
- **Do regular check-ins / Identify future improvements (1 month, 3 months, every 6 months)**
  - Acknowledge when things that need to be better
  - Ensure the “wins” continue and are celebrated
  - Look for future improvements

Some Truths

- **It’s Okay to Stay (or Stop)**
  - A tech assessment isn't a commitment to buy; it’s a commitment to clarity.
  - The "No-Go" Option: Don’t change unless you are sure
- **Don’t Skip Steps**
  - Too many people dive into generic demos and buy the shiney features and don’t solve their biggest problems
- **Plan for "Reality," Not "Best Case"**
  - Your people have their current jobs to do
  - Expect bumps in the road
- **It’s Okay to Ask for Help**
  - Your team might be great at using a CRM, but that doesn't mean they are experts at architecting one. An outside consultant has seen the “potholes”

YOUR FEEDBACK MATTERS!

SCAN HERE FOR A SURVEY!

THANKS FOR JOINING US!

- Paul Keogan
- CEO, BackOffice Thinking
- www.BackOfficeThinking.com
- https://www.linkedin.com/in/paulkeogan/

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