‘Technology can be your friend.’

Technology can directly and indirectly increase your fundraising revenue,
in the short and long term.

How to choose a tech partner

Audit:

If you don’t know where you are now, you don’t know what paths are available to you.

1. What have you got now?
    a) What is working about it? What is not?
    b) What do you want to keep?
    c) What will your new tech need to work with – hardware and software.
    d) What non-fundraising systems do you use: e.g. finance, gateways, website, ISP provider and internet access (consider remote access).
2. What stakeholders are involved?
    a) Board, clients, members, regional offices etc.
3. Who will sign off?
    a) What is their experience and expertise?
    b) Are there any preferences, opportunities or limitations that might impact the decision?
    c) Are they onboard?
4. Who does the work now? Data entry, comm’s etc
    a) What are their capabilities, expertise, experience?
    b) Are they open to change?
    c) Do they learn easily?
5. What’s your budget?
    a) How will you fund it?
    b) Subscription or up-front?
6. How many records do you have?
    a) Be careful not to underestimate.
    b) Consider all contact info i.e. donors, volunteers, members, clients, media etc
    c) When your data is siloed, you miss fundraising opportunities!
    d) 66% of volunteers are also donors.
7. Record you baseline information
    a) You can’t see trends if you didn’t record your starting point.
    b) Record what you have, warts and all.
    c) Write it down. You will refer to this.

Do the internal half of a SWOT, ref: Erica Olsen, YouTube – great ‘SWOT How to’.

Scope

The external elements of your SWOT and future projections. Have a look at what is out there, get a feeling for the opportunities you may not be aware of – but watch for scope creep.

Create a checklist that is personal to your organisation. Prioritise or rank your checklist:

1. What is most important to you?
   What can you live without or delay for later development?

Look at the traits you want from your provider:

1. Integration
   a) with other functions (giving software) and with other API's and other software.
   b) How well does it play with others?
2. Automation
   a) What can and can't be automated?
   b) Where could it save you time and effort?
3. Set up and migration
   a) What custom fields are available or need to be set up?
   b) What is the migration process?
   c) Who will do the migration?
   d) What security is there around file transfer?
   e) Can you migrate if you want to?
4. Who owns the data?
   a) Consider security and PCI compliance.
   b) How easy is it to get it in and out when you want to?
   c) Can you control opt in's and opt outs?
   d) Will your provider talk to your contacts?
5. What can you customise yourself?
   a) What requires a developer?
   b) What if your requirements change?
6. How will your branding fit?
   a) What happens if it changes?

Consider the traits you'd like to use in the future:

1. Who will need access in future?
   a) Really need access – don't overestimate your requirements here.
   b) Keep in mind the importance of maintaining your data integrity and any privacy concerns
2. Where will they use it?
   a) Cloud, mobile, desktop?
   b) How will they connect?
3. Will you always have cloud access?

Explore the risks:

1. What is the worst-case scenario?
2. Can you get out of your contract, with all your data?
3. Are there any penalties or fees for breaking the contract or final data extraction?

Get to know potential providers.

Spend time together and get to know your potential providers.
1. Review the demo's available – especially ones where you can self-guide
2. How accessible are they?
    a. Where is support?
    b. How can you contact them?
    c. Will time zones impact?
    d. How quick is their response time?
3. What's their history?
    a. How long have they been in business?
    b. Do they have sound financial backing?
    c. Do you trust them to still be around in 5, 10, 15 years?
4. Can you access the training information?
    a. Can you understand it?
    b. What training beyond the software itself do they offer?
    c. Will they guide you through the process or are you on your own?
    d. What's included in on-boarding?
    e. What if your staff change or need retraining?
5. How well do they communicate with you?

Cost:

How much will it cost?
1. What is the length of the contract?
2. What if you break the contract early?
3. Ask about everything!
    a. Check every function they offer.
    b. Is there a cost to personalise or customise it?
    c. Is there a cost if you want to make changes later?
4. Training costs:
    a. Software specific and strategy.

Hidden costs are often a trigger in the breakdown of provider relationships.

How to use your technology

Commit:

1. You've gone to all the trouble of putting in software, so commit to using it as well as is possible.
2. Ensure staff are onboard, open and willing to learn.
3. Go back to your why. Why do you need it? What will it help you achieve?
4. If the provider issues advice and recommendations use them. If they issue blogs and training sessions to improve its' use, watch them

Be consistent:

1. Write set up Set-up and Data entry guidelines as you go – and stick to them
2. Plot the donor journey so you can review, analyse and replicate it in future
3. Produce consistent reports
    a. Talk to your stakeholders, figure out what reports you need to answer the questions you need to answer and produce them consistently. The same reports at the same time of the month – so you can see trends developing.

Communicate:

1. Keep in touch with your provider
2. Watch for updates, upgrades and fixes
3. Go back to your checklist and talk to them about it.
    a. Are you able to do all the things you wanted to?
    b. Are there developments required?
    c. Do you need more training?
    d. Ask how you can improve your return, automate more, minimise the resources required.

Cooperate:

1. Recognise your responsibility in making your tech work for you. Technology is a tool it's up to you what you do with it.

Fundraisers are being asked to be across more and more pieces of software and every day.

1. Invest in education and training for your teams.
    a. Both training that is specific to your new software and general IT training.
    b. Make time to keep an eye on new developments.
2. Acknowledge that learning systems requires energy.
    a. Give your teams the time and the space they need to learn.

A final word:

While technology is getting better at helping us to facilitate and maintain donor relationships it cannot take the place your people.

Making decisions about what audience to target and how, requires thought and energy. Writing the content to do that effectively requires skill and empathy.

No tool can do that job for you, nor should it. It's your relationship and you need to play the major part in it. Tech providers can offer hints and tips and tricks, but the donor relationship is yours and you should own it.

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