Pursuing a Data-Driven Culture
Roadmap for an Outcomes Management System

You might be struggling with funder reporting. You could be wondering how to make sense of all the data you collect through your programs. Or you could simply be looking to understand better what is working.

Every day, we partner with organizations like yours, helping to track and automate data so that you can measure your results. We see firsthand that outcomes thinking is having a revolutionary effect on the social sector. It can help your organization hone in on programs that are making real change, ensure funding is based on results, and inform decisions so you can better change the world.

The social sector is increasingly developing an outcomes-focused approach, as indicated by the rise of social investing, impact investing, social innovation bonds, and evidence-based practices. As a results-minded nonprofit, you also should be considering how to take a data-driven approach and support it with technology. But you might be unsure where to start. Outcomes management is a journey that evolves as your experience with it grows. You'll be introduced to a new way of thinking about making decisions and improving programs. You will be continuously striving to improve programs and services, but will be rewarded with greater impact for your clients and success in your mission.

In this paper, we'll highlight the three key areas on which to focus when taking this path:

1. Learn
2. Build
3. Adopt

These steps won't be a discrete process. You'll likely start by developing knowledge about this topic, but as you go further, you may build and adopt processes and systems iteratively.

Use this roadmap to start your exploration of outcomes management - we hope it leads you down a path of fruitful results and stellar outcomes.

1. Learn

Building your Knowledge about Outcomes Management

Your first step in creating an outcomes-focused culture (and the systems to support it) should be to understand how to use data to drive your organization's strategies and tactics, including performance and outcomes management practices.

Performance Management is the discipline of making good decisions with data, and is the foundation for outcomes management. This applies to all parts of your organization - collecting and using data to inform what you do in your programs, your finance and accounting activities, your human capital strategies, etc.

Outcomes Management specifically targets how your programs and services are achieving their desired results for your clients or constituents and helping you accomplish your mission. There is a wealth of resources that you can access to gather this knowledge (we've included some at the end of this report). Your end goal for this component will be to set up performance management processes and define an outcomes management framework.

Key Questions to Ask Yourself:

- How can my organization practice performance management?

- What do I need to measure in each of the following areas of my organization to know if we are doing well (for example: Finance, Human Resources, Communications and Marketing, Development, and Programs)?

- How can I manage to outcomes for my programs?

- What are the steps to achieving our mission?

- What activities will generate the program results we are seeking?

- What are the outcomes we are going to track for each program and for the organization?

- What are the indicators for these outcomes?

2. Build

Putting Systems and Processes in Place

Your organization is likely tracking lots of data, but your data may be disconnected and scattered. You might be struggling to pull together all the data in one place so you can understand your performance. Implementing systems that help you capture and use the data to make decisions across your organization is crucial for sustainable performance and outcomes management strategies.

Even if you haven't completed your outcomes management framework, you can start immediately by focusing on improving how you are collecting data. Ideally you'll want to implement technology that allows your staff to collect data while doing their work so that they waste less time and are motivated to collect data. As the different parts of your organization collaborate and share information, it also important that your data management systems work together so you can see a full picture of your organization's impact. Over time, you can build out systems that support each aspect of performance management and outcomes management.

Key Questions to Ask Yourself:

• What data do I currently collect to measure each of my organizational processes?

• What new data do I need to start collecting for performance management and outcomes management strategies?

• What data should I stop collecting because it doesn't fit into these frameworks?

• What systems am I using to collect this data now? How are they working?

• How can these systems be integrated? What systems can be combined into one?

• Who can lead the initiative to develop these systems? Do I need external resources?

3. Adopt

Establishing an Outcomes-Focused Culture

You can't create an outcomes-focused organization simply with a framework and a system. The final piece of the puzzle - which is arguably the most important - is cultural change. This applies to every position in your organization.

Your management needs to lead by example when modeling an outcomes mindset, but all of your staff members must also start using data to make their decisions. Staff need to understand why you are introducing these new systems and processes and how they will both make their lives easier and benefit your clients and constituents.

Because these changes are so fundamental, you might meet with resistance. You'll need to take the deliberate approach of an adoption plan for your outcomes management processes and systems.

Key Questions to Ask Yourself:

- How can I most effectively communicate these new processes to my staff?

- What are the benefits for individual staff members? What will convince them that these new processes and systems are worth the effort to learn?

- Who will be my champions and how can I help them to influence the rest of the team?

- What does each staff member need to be trained on? How does this differ across my staff?

- What type of training has been most effective for my staff in the past?

- How does my process training need to be different/similar to my technology system training?

- How often will I follow up on this training with staff?

- How can I measure how well my organization is adopting this outcomes mindset?

Resources

Salesforce® for Outcomes Management

Outcomes management systems need to be robust, flexible, and interoperable to capture the data you need to track your results and put this data at your fingertips so you can make day-to-day decisions. Salesforce provides a world-class platform to support your performance and outcomes management efforts:

- Configurable for your specific results tracking needs as they change

- Provides powerful automation capabilities built into the platform

- Enterprise-grade safety, security, and availability

- Capable of integrating with almost any system through a robust API

- Scalable for growing organizations

- Designed for easy adoption and use by non-technical users

🏠 About Us

Exponent Partners

Exponent Partners is a mission-based software consulting firm that helps nonprofits and foundations use technology to track results, build capacity, improve reporting, further missions, and increase impact. Exclusively focused on the nonprofit sector, we build cost-effective solutions on the Salesforce.com platform that manage fundraising, student data, client cases, and organizational outcomes.

We've worked with almost 400 nonprofit organizations on over 1000 projects in our nearly 10-year history as one of the leading partners of the Salesforce.com Foundation. Our expertise is in human services, education, foundations, and social impact. We offer services, products, and solutions based on each client's unique needs, time, and budget.

As a Certified B Corporation, we pursue our world-changing vision of revolutionizing the social sector by providing technology that makes the whole sector more effective.

For a free consultation about your project or to find out more, contact us:

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