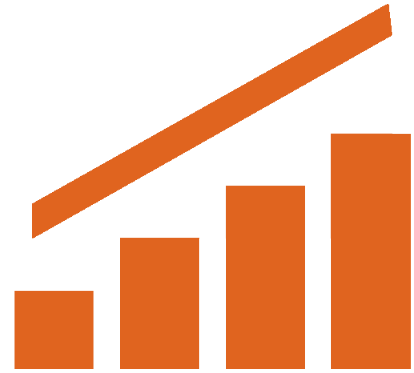
Nonprofit Technology Adoption:



Why it Matters and How to Be Successful

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I. The Case for Adoption: Achieving Better Results

Your organization likely chose to invest in a new data management system to improve efficiency, reduce manual processes, and leverage data to improve your programs and results. You researched and chose the right tool for the job. You're already investing significant budget dollars in the implementation of your nonprofit's technology solution. You might be asking, "How do I make the most of this investment?"

To see the benefits that you hoped for, you'll need to ensure that your staff actually learn and use your new technology. This doesn't happen automatically. That's why organizations like yours are increasingly realizing that technology adoption is as important as the technology you choose. Statistics from a 2014 NTEN study* show that seriously investing resources in training for your staff corresponds to higher adoption and ultimately technology effectiveness. Leading organizations were 3 times more likely to include technology in their strategic plans, and invested on average 43% more per staff member on technology training than struggling organizations.

Planning for Success

In our nearly 10-year experience as a technology implementation partner for nonprofits, we have seen that organizations succeed or fail in improving their technology effectiveness based on their focus on adoption. Successful ones invest up front to get all users on board and reap the rewards in the long run. Unsuccessful ones rush to implement but often their systems lie dormant or half-used years later.

Numerous surveys from the business sector also examine the high failure rate of IT projects (several studies cite a figure of about 50%). We believe that at least one of the causes is universal: a failure to bake an adoption model into the implementation plan, resulting in a technology solution that may sit largely idle. Your organization can buck the trend by establishing and implementing a detailed adoption plan and investing the appropriate resources.

Even before you implement, you should already be thinking about how your organization is going to adopt your solution. And, no matter where you are in the implementation process, putting together an adoption plan can help point you in the right direction.

In this report, we'll give you a high level overview of how to get your organization in shape for technology adoption and best practices for facilitating this critical process. You'll see case studies of other nonprofits who have taken similar steps. After you've read our report and you are ready to dive in, you'll learn where you can find further adoption support if you need it.

*Source: http://www.nten.org/research/the-8th-annual-nonprofit-technology-staffing-investments-report

II. Getting Started

Is Your Organization Adoption Ready?

The first prerequisite to successful adoption for any technology system is alignment. Learning a new system or changing processes is hard, especially when your staff has a lot of other responsibilities. Your organization needs to be bought in and prepared for the system… or staff might resist these changes.

You can check if your organization is adoption-ready by reviewing these three major components:

1. Executive Sponsorship

You have an active and visible executive at the helm to lead your organization towards full adoption. The executive sponsor has fully embraced his or her role as advocate for the new technology.

2. Organizational Alignment

Your entire organization, including key stakeholders, executives, and staff, has co-created and aligned around documented project objectives. These objectives have been communicated internally and are well understood across your organization. You also have a clear owner for the system long term who can champion adoption.

3. Adoption Action Plan

You have internally developed a project plan, and your team is committed to managing it. Tasks, roles, dependencies, milestones and timeline have been assigned, and expectations have been captured in your project plan. You have identified who has the authority for key decisions and who is held accountable for the project. Finally, you have accurately assessed your capacity to make these changes, notifying staff of time and attendance expectations and the priority of adoption.

> "A key to our being adoption-ready was acting early to give meaningful involvement to our staff and Power Users. Even before the project began, we were meeting with staff to collect input, refine process, set expectations and prepare them. When it wasn't possible to communicate with all staff, we really leveraged our Power Users to extend our reach. Staff learned to turn to their Power User for support long before we launched."
>
> **– Steve Heye, Manager of Technology at The Cara Program**

Gauge the status of each of these components carefully. They are like the legs of a tripod -- if any of the three are missing, it will fall over.

Tips if You're Not There Yet

- Take the time to meet with all involved parties and give them full context for the project. Make sure to listen to and address any organizational concerns, and get buy-in on specific objectives.
- Make sure your executive sponsor has visibility, appropriate organizational knowledge, and full commitment to the aims of the project.
- Draft a detailed project plan which is approved by all involved parties. If needed, consult an implementation partner for guidance on what should be included in your plan.

No matter where your organization falls on the scale of adoption readiness, the rest of this report will give you some hints on the components of your project plan, which will ensure your organization is on the right path to adopt the new technology.

III. Best Practices

An Overview

Once your foundation for adoption is in place, you'll want to begin enacting your adoption plan. You may have already built out an extensive adoption plan or you are just getting started. Wherever you are on the adoption readiness scale, the following best practices can make any adoption plan much richer and more complete.

We'll cover the following steps in more detail in the sections to come:

1. Sustaining the System
- Identify your project and post-project staffing requirements and resources.
- Develop your internal support process and communication.

2. Getting the Team Up to Speed
- Document not only your system but also the processes it supports.
- Develop a training plan.
- Develop your end-user training materials.

3. Monitoring Success
- Track your performance metrics and outcomes.
- Assess data quality and user activity.
- Review your progress and engage users at intervals.

Sustaining the System

Staff Roles, Resources and Internal Support

You not only need an adoption plan, you need core staff to lead, follow through, and make sure that all the steps of your plan happen. This means that designating roles is critical.

Identify your project and post-project staffing requirements and resources.

We recommend that when you go through your Action Plan, you assign the following three core roles (in some cases, one person may fulfill multiple roles):

1. Executive Sponsor

As mentioned in section II, this role is critical. The Executive Sponsor has the authority to set the overall objectives of the implementation and a key influencer in setting organizational mindset around the new technology.

2. Adoption Champion

The project team member in this role drives the adoption action plan. The Adoption Champion will often be the staff member responsible for the implementation of your system (and sometimes also the System Administrator).

Sustaining the System (cont'd)

3. System Administrator

The System Administrator is the day-to-day owner of the system, providing user support, troubleshooting and data oversight. They are ultimately responsible for making sure your team gets the most out of the system.

Develop your internal support process and communication.

Develop and document a process for who will address technology questions from your staff, where those questions will be managed, and which resources your internal support team members can tap if the questions are beyond their expertise. We recommend you use a system that allows staff to log problem tickets and search for answers to common questions.

Getting the Team Up To Speed

Training and Documentation

Adoption is a dynamic process. Trainings need to not only be tailored to specific objectives, but also flexible to accommodate staff feedback and any unexpected hiccups.

Document not only your system but also the processes it supports.

Your staff need to understand the new technology in the context of their job, so you will want to teach them these processes as well as your new technology. You may be changing some of the way you work, either to be more effective, to respond to your new system's functionality, or both. Make sure to capture these changing methods in your documentation.

Develop a training plan.

Think about the different levels of staff technology familiarity in your organization, and try to define a training path for each. We recommend allowing for group trainings and one-on-one training to address users' unique learning needs. Identify your power users and those who will be able to train others and develop materials. Expect that your timeline may need to be adjusted as you learn more about staff needs.

> "We ran our training over three sessions for each team of staff by role. The first training was an intro to the system, the second training was focused on the specific steps for their job, and the final session was a set of homework steps to be completed in a sandbox. We wanted to be sure to give everyone a chance to use the new system, not just see it. Plus, the homework helped our users test the new system for us."
>
> **– Steve Heye, Manager of Technology at The Cara Program**

Multiple nonprofits noted that having a few sessions, as well as staggered deadlines to learn different aspects of the technology, helped ease staff into adoption. Expect a little fear of the unknown, and don't throw people into the deep end from day one. Some systems provide a "sandbox" or testing environment so users can safely experiment with the system without affecting your data.

Develop your end-user training materials.

When creating training materials, we recommend starting by giving a bigger picture overview of why you are transitioning to the new technology first, and what benefits it will provide. As well, you may want to break out training on usage and processes by role.

Monitoring Success

Performance, Data Quality and Review

Measuring your progress with adoption is critical to ensuring you are getting the most out of your investment. You can use specific staff and program targets to continually improve how your organization is using the system.

Track your performance metrics and outcomes.

Observe trends or watch the growth in specific programs by setting up dashboards and reports to target your program results. Some examples of these might be assessment data or units of service provided. Even if you aren't involved in running those programs directly, you'll want to know that staff are collecting the data you need to measure your results and outcomes. If you aren't seeing the rich program data you expected, you may need to evaluate what barriers your staff are encountering to inputting the data.

Assess data quality and user activity.

Dashboards can also be set up to track data completeness per your organizational guidelines such as whether emergency contact information is present or how many assessments per client are being completed. You can use this to get an overall sense of whether your data is rich and/or meeting particular objectives. In the same way, you can track your users' logins, record creation, and other activity. This will help you to understand which of your staff are using the system regularly and proficiently, and which may need further assistance.

Tip: One nonprofit set up a series of basic reports for their users to show them the value of the new system from the outset and get users started with examples. Some ideas for reports you could build are: specific funder reports, system reports, data quality reports and performance reports.

Review your progress and engage users at intervals.

Adoption can often be an ongoing, months- or even years-long process, and you will want to develop a regular review to assess the progress of your staff towards full adoption. You may notice new configurations need to happen as you get more technology users or want to create more relevant reports as the data available in your system grows. Create a schedule and identify the right staff members to be involved. Be sure to make plans to address any issues you find during your reviews, and keep encouraging user buy-in. For ongoing user engagement, we recommend delivering a monthly update about your system to the entire organization to keep the conversation going.

Getting Ahead and Staying There

Thinking about the Long-Term

With informed leadership, smart planning, and organizational buy-in, you will already be ahead of the game on your technology solution adoption. You will ensure that your team learns the system and works out any kinks by: executing on a timeline that involves your whole organization, assigning key roles to staff, dedicating time to training and materials, and steadily monitoring your progress. Beyond that, staff will begin making the new processes their own.

One of our adoption specialists notes: "Adoption is a moving target. You're dealing with the human element of users and system admininstrators. Having a plan is key, but in situations where users haven't seen a similar system before, it's really about being there and helping them along. The difference across organizations is mainly going to be how much guidance staff need to get there, and then hopefully you all end up at the same place!"

With full adoption, you will derive the maximum benefit from the investment you've made. Because you are thinking about the big picture, your organization will commit more time and resources up-front in adoption, and be more effective integrating your technology usage with your work. Ultimately this will ensure your organization has the data you need to measure your results and uses those results in evaluating how to serve your clients and constituents better.

"Our goal for implementing Salesforce was to move from a data repository to a system which would drive our workflow, inform our process and enable our staff. The only way we will ever succeed in our goal is not only to have people use it, but embrace it, change the way they work and integrate it into everything. The real value is not from the software, rather it enables us to radically change how we get things done."

– Steve Heye, Manager of Technology at The Cara Program

Exponent Partners' Adoption Support Program

If you are considering a CRM or have recently implemented one, you may be interested in guidance throughout this process and resources to ensure adoption. We offer **adoption support** as well as **implementation** for nonprofits with Salesforce solutions.

We exclusively serve nonprofits, and are **unique amongst our competitors in recognizing the need to take additional steps to ensure adoption of technology solutions.** We assess your organization's unique training needs and develop a customized plan to ensure that your team adopts your solution and maximizes the benefit it can provide your organization.

Our adoption support program walks your team through all aspects of creating and executing an adoption plan -- including best practices we've seen in organizations like yours. Adoption support starts with an analysis of your goals and developing a plan to reach them. After this initial assessment, your organization will work with our team to develop metrics to track system adoption, coaching for internal trainers, co-creation of a communication plan and setup of the ongoing process to maintain staff adoption. These deliverables are designed to be ongoing tools that you can leverage as your team grows and expands its usage of your system.

For more information, contact info@exponentpartners.com and ask about our adoption plans.

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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