

The background is a blue-toned image of a highway at night, with light trails from vehicles. Overlaid on this are white digital circuit lines, nodes, and arrows, suggesting a technological or data-driven theme. A large, stylized white arrow points from the left towards the center, partially behind the title.

Digital Strategy Toolkit

for Associations & Nonprofits

A set of four white chevrons pointing to the right, located in the middle-right section of the cover.

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INTRODUCTION

At its core, digital strategy is a decision-making process that aligns an organization's vision, goals, opportunities, and activities to maximize the business benefits of digital initiatives. When implemented thoughtfully, a digital strategy will identify priorities, implementation milestones, and progress toward the strategic goals of your association or nonprofit.

To build your digital strategy, your organization must look beyond its operational needs by examining how technology will allow your association or nonprofit to become a digital-first, digital-charged, and digital-focused organization. Additionally, you—and your vendors—must acknowledge the industry trends and member dependencies, as well as technology, political, and economic factors that impact or rely upon your technology systems, policies, and products.

Several months of planning may be required before you are able to develop and implement your digital strategy. DelCor is ingrained in the association and nonprofit community, with extensive experience helping our clients develop technology strategies that help them achieve progress. In this eBook, we will review the assessment activities and tools DelCor uses to help associations and nonprofits build their digital roadmaps. We will provide guidance in building a digital strategy that supports your organizational mission, vision, and goals—and acts a roadmap for your digital future.



ASSESS THE CURRENT STATE

Before you begin your digital strategy, you must consider all external and internal factors that are critical to implementing effective technologies. We recommend beginning this process by investigating both the internal and external landscape of your organization and gathering a plethora of quantitative and qualitative data. Before you begin, ask these five key questions:

1. Are we gathering information all the time from digital sources to make business decisions and improve member experiences?
2. Is the brand experience we create always available to our audiences?
3. Is the product or content we are developing intended for digital use, and perhaps later adapted for other channels (vs. the other way around)?
4. Are we dedicating the necessary resources to stay at the digital forefront?
5. Are we recruiting the talent that will be able to move the organization into an interactive, digital future?

Answering these questions can be difficult and time-consuming. You might be forced to think about policy changes or new processes. Like any quest to improve, change management will help quell fears about this new and unknown digital future. An independent consultant, like DelCor, can leverage their outsider status and their experiences with like organizations to guide and facilitate these conversations. And they'll be prepared with a full complement of tools to proceed with your assessment.

Internal Assessment

We recommend working with key internal stakeholders who will shape the framework of your digital strategy. To begin, you must determine who those stakeholders are—it's critical not to overlook this identification process or to assume you know them already! We recommend taking a step back to review each potential stakeholder's relevance and importance to your strategy as well as define what qualifies someone as a stakeholder. Remember that every stakeholder you identify must buy-in to your strategy and goals. These individuals or groups will be critical to the successful implementation of new technology within your organization.

Discussions with these stakeholders should uncover your organization's departmental dependencies, organizational pain points, concerns, and operational priorities. However,

we do not recommend relying on interviews alone to collect data from stakeholders. Make sure you have a strategy to collect data from individuals less likely to speak up. Some potential data collection formats include:

- Survey
- A Sticky Note Idea Board
- Anonymous Idea / Issues Collection
- Shadowing

Whatever internal assessment exercises you choose, make sure that the data you are collecting is actionable. Analyze your stakeholder input carefully, and report back on key decisions. Transparency and clear communications are key to maintaining participation and progress.

External Assessment

It is important to have a thorough understanding of your members' and constituents' needs. Technology should support your external stakeholders as their satisfaction is crucial to achieving the mission and vision of your organization. Ultimately, you will need to determine the unmet needs and goals of your external stakeholders that most closely align with key business opportunities and/or challenges. It is important that your goals are clearly stated and that expectations are realistic. Consider carefully the tools you will use, what you will do with information collected, and how you will communicate with these stakeholders. You need their buy-in, too.

Technical Assessment

Naturally, you will need to assess your existing technology infrastructure and evaluate your current digital climate, to uncover how those assets fulfill internal and external stakeholder requirements. Your assessment will provide an overview of the technology your organization is currently dependent on and determine if it is assisting your association or nonprofit in achieving your mission and vision. The following questions should be taken into consideration when going through the technical assessment exercise:

- Does this technology help achieve our organization's mission and vision?
- Do internal or external stakeholders use this technology?

- How does this technology benefit internal or external stakeholders?
- Is this technology being used *correctly*?
- Are technology resources being used *optimally*?
- Does this technology need to be updated?
- What is the cost / benefit of this technology?
- Is this technology replicable?

When reviewing your technical assets, consider each one's impact on different areas (or departments) of your organization. For example, cybersecurity will most likely impact every individual within your association or nonprofit.

DelCor employs an IT Maturity mindset in our assessment of any organization's technology assets, policies, and practices. Our IT Maturity Model for Associations & Nonprofits guides this thinking, empowering organizations to determine how they compare to similar organizations and how to move up the maturity ladder to better serve their mission, vision, and goals. To help you get started on understanding your digital environment and how it integrates with your overall technology landscape, we offer varying levels of assessments for associations and nonprofits.

[Contact us to learn more about the value of an IT Maturity Assessment.](#)



DEFINE THE FUTURE STATE

After assessing your current digital state, you will need to define your future state and identify pathways to achieve your future vision. Apply the data you have gathered from assessing your current state to define two tiers of focus – organizational focus and member focus.

Your organization focus should include:

- Member Intelligence
- Collaboration
- New Product Exploration
- Sales & Service Optimization
- Enterprise Technology Architecture
- Processes, Innovation, and Governance

Your member focus:

- Websites
- Mobile Apps
- Communities
- eCommerce
- Social Media
- SEO



IDENTIFY PATHWAYS TO FUTURE VISION

Once you have defined your future state, you must identify the pathways that will help you achieve your goals and objectives. DelCor uses several tools to start to carve the pathways that will result in digital success:

Identify Gaps

When you know what you're lacking, you'll be better equipped to help your association refocus on delivery of new and improved digital services. A gap analysis shows how your technology is supporting your goals—or isn't.

The synchronicities you identify will be translated into a list of action items that will help you achieve your goals. Action items should include both technical implementations and business process improvements. For example, consider how can you deliver the same service using multiple digital formats. This can help you identify where there is a gap between current delivery and the value to you want to deliver.

Prioritize Your Technology Needs

Prioritizing your action items will determine the structure and timeline of your strategy. To determine what should be completed first, we recommend identifying measurable criteria based on factors important to your organization. Factors can be weighted to create a working list of priorities.

One method to consider is a weighted scale. For example, identify criteria and grade on a scale of 1 to 5:

- **Urgency:** If this item is not completed, will it affect the organization's ability to function?
- **External Importance:** If this item is not completed, will it affect my relationship with my members or constituents?
- **Organizational Importance:** If this item is not completed, will it hinder my ability to achieve my mission and vision?

Sample of Project Prioritization Matrix

RATING GUIDE (100 possible points)				
Rating		10 Points	5 Points	1 Point
IMPACT	Strategic Alignment	High - Project align with our strategic initiatives	Medium - Project is somewhat or indirectly aligned with our strategic initiatives	Low - Project align with our strategic initiatives
	Member Value	High - Project provides major member value/benefit or vastly improved member experience	Medium - Project provides some member value/benefit or some improvements to member experience	Low - Project provides little to no member value/benefit nor improved member experience
	Operational Value	High - Project provides major operational value	Medium - Project provides some operational value	Low - Project provides little to no operational value
	Business Value	High - Project provides major competitive advantage	Medium - Project provides some competitive advantage	Low - Project provides little to no competitive advantage
	Financial	High - Project provides major ROI (>\$50K/year)	Medium - Project provides some ROI (>\$5K/year & <\$50K/year)	Low - Project provides little to no ROI (0 to <\$5K/year)
EFFORT	People	Low - Technology Team	Medium - Technology Team & 1-2 Business Units	High - Organization Wide
	Capital	Low - Cost<\$10,000	Medium - \$10,000<Cost<\$50,000	High - Cost>\$50,000
	Duration	Low - Less than 3 months	Medium - 3 months - 1 year	High - Greater than 1 year
RISK	Technology	Low - COTS applications can be easily implemented/upgraded	Medium - Requires configuration & integration that require some ongoing maintenance	High - Highly customized, requiring a third party support/ maintenance agreement & upgrades
	Management	Low - Can be managed/ supported w/current staff/ skills	Medium - May require some staff training & need for external support	High - New position required

Of course, your organization may include other factors when determining prioritization. The important thing to remember when evaluating each action item is to remain objective. You should never prioritize a project solely because it is someone's 'pet' project, yet is not an immediate priority.

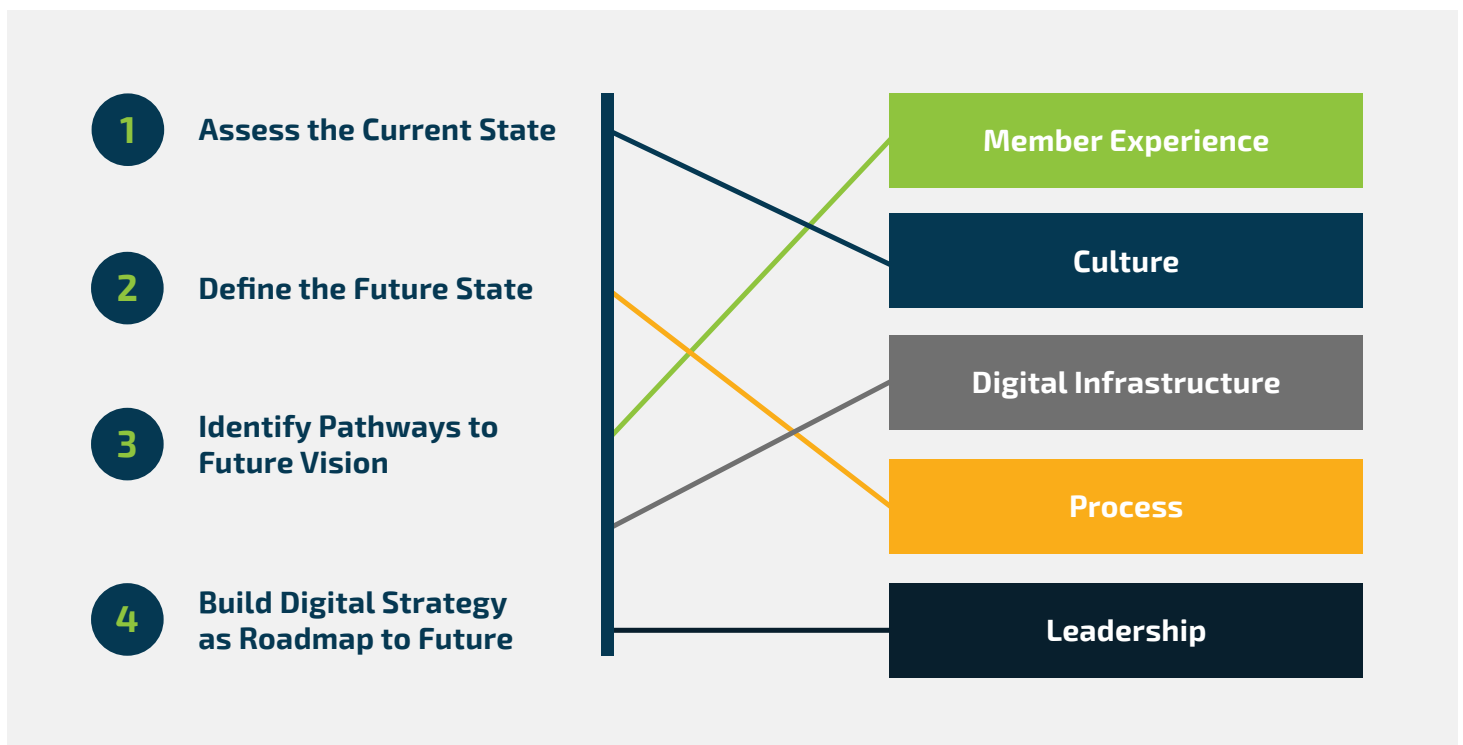
ROADMAP FOR THE FUTURE

By this time, you have compiled what feels like endless amounts of data, set goals, reviewed your current technology, established action items, and determined your technical priorities. Finally, you are ready to build your digital roadmap—a timeline to ensure the successful implementation of all identified actions.

The roadmap should align your goals with each item and dedicate a specific time period for when that action will be complete. This map is meant to be a living document; we recommend

re-evaluating and restructuring your roadmap as priorities shift—perhaps during regularly scheduled reviews, rather than willy-nilly!

Every stakeholder in your organization should buy in to this roadmap to ensure its successful implementation. At DelCor, the roadmap often looks like a spreadsheet. It's not sexy, but it works. However, keep in mind that you may want to communicate more smoothly with your stakeholders, rather than posting a clunky spreadsheet to a shared drive. Use charts, graphics, pictures, and stories to bring your roadmap to life—and to help stakeholders see themselves on your road to success!



DELCOR

DelCor has been helping associations and nonprofits discover the benefits of technology for over 30 years. Our consultants specialize in finding technology solutions that support the mission and vision of your organization. In addition to helping you build and implement your digital strategy, DelCor is a top-tier technology partner and hosting provider staffed by personable experts who aid in the strategic and technical support of associations and nonprofits.

Our breadth of services and experience allows us to take a unique approach to understanding the specific needs of your association or nonprofit. Contact us today to learn more about how DelCor can help advance your organization's digital endeavors.

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