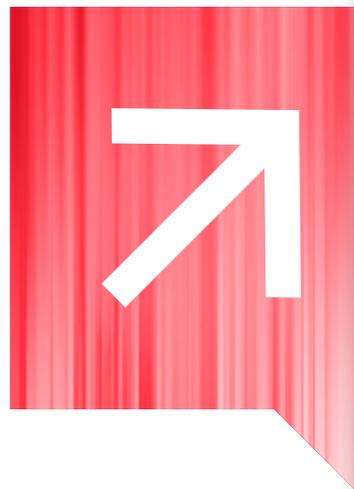


Developing an Impactful Nonprofit Digital Strategy



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Key Takeaways

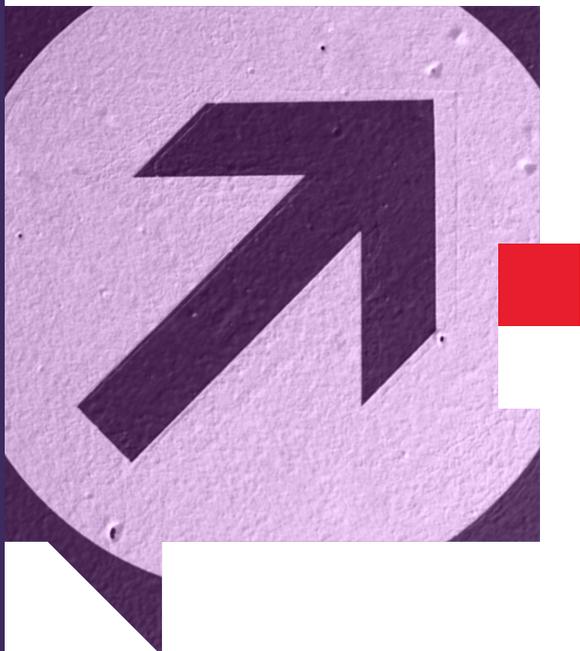
Flexibility & Responsiveness is Key: Especially in uncertain times, allowing for flexibility within your strategy will make it easier to execute and increase its effectiveness.

Elements are Similar but Approaches Vary: Like a story, your strategy will need some key ingredients to be successful, but there is no “one-size-fits-all” model for how to do it.

Internal Information Gathering Breeds Efficiency: Gaining internal buy-in and understanding of what’s happening now, and how you can improve it, will help you be successful in your strategy.

Change Management is Part of Your Strategy: Your strategy’s success depends greatly on how it addresses change internally. Forced change is rarely successful, which is why change management is an essential part of your approach.

If You Need Help, Ask the Right Questions: When hiring a consultant, make sure you know what it is you need help with so that you can get tailored and targeted responses that fit your needs.



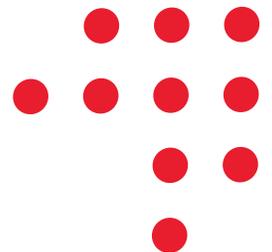
What Is Digital Strategy?

First, let's get on the same page with what we mean by a "digital strategy." Defined simply, a digital strategy is a clear vision for the future of your organization's digital ecosystem and a plan to get there. As we've seen over the last year, an organization's ability to shift and pivot its approaches is also required in such a rapidly-changing landscape. Because of this, it's crucial for organizations to focus on a digital strategy that is rooted in organizational goals, audience needs, and the impact you are hoping to achieve.

"If you don't know where you are going, any road will take you there." Lewis Carroll

Nonprofits and government agencies are always thinking about how they can use their resources wisely, so it is vital that they consider how to strategically use technology investments. A successful digital strategy should be flexible enough to accommodate technology and organizational changes and specific enough to chart a clear course that that aligns the entire organization. A nonprofit digital strategy should also consider four dimensions of digital transformation that are essential for success: people, architecture, routines, and culture.

No two organizations' digital strategies will look the same even though there are a myriad of best practices to draw from. Your organization's digital strategy will be influenced by senior decision-makers' input on your priorities, research on your target audiences, competitive analysis, current skills and capacity, and organizational velocity of change.



The Anatomy of a Digital Strategy

Though your strategy will include information that is specific to your organization, starting from a template will help you to formulate areas of opportunity and risk. Here are some elements to consider when determining what your digital strategy should include.

A Unifying Vision: When you define success from the start, you can ensure that all your key stakeholders are on the same page about where you are trying to go with your digital presence. Your vision should be a healthy cross-section of what your audience is looking for and what you are hoping to achieve.

Objectives & Key Results: Every digital or communications activity your organization undertakes should be strategically aligned with the mission and goals of your organization and the wants and needs of your key audiences. This section will help determine how things will be measurably different when the strategy is implemented.

Key Audiences: Define who you are trying to reach and what they care about. This is best supported by research and analytics and can be presented using short personas. Include the key people within these audiences, what they are hoping to get from your organization, and how you can serve them.

Digital Product & Service Mix: Think beyond your website and ask yourself what you need. A podcast? A private community? An online learning platform? Evaluate all of your digital properties and determine what to delete, improve, and add. Be realistic in terms of what resources (i.e., time, money, staff) you have to

commit to these products, and devote some space to what capacity or budget you might need to add to fulfill these needs.

Digital Brand Experience: Using information about your key audiences, develop the right messages and brand story to achieve your mission through defining the brand experience you will create for them every time they interact with your organization. This is also a great time to evaluate your brand character, logo, and design elements.

Content Strategy: Make sure that every piece of content you produce has an intentional target audience, message, tone, and call-to-action. Think holistically about what format your content is in, where your content lives, how it is accessed and used, and how often it should be updated.

Supporting Technology: Once you know what kind of experience you want to create for your target audiences, determine the technology that you need in place. This may involve updating or consolidating existing platforms or investing in new services.

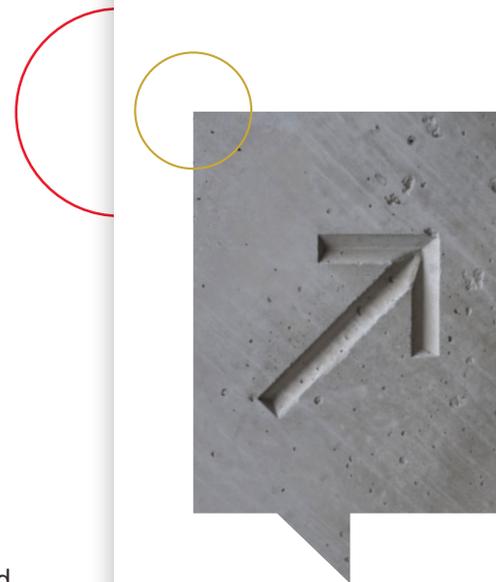
Staffing & Organizational Change Management: Ensure your strategy's success by identifying an implementation team, defining who is responsible for each component, and creating a roll-out, training, and long-term management plan.

Budget & Timeline: Your digital strategy should include a budget and implementation timeline. Budget can include the cost of development, licensing fees, site maintenance and support, and employee salaries.

Questions to Ask When Developing a Digital Strategy

To get started, you may consider convening an internal stakeholder team, which could include representatives from key strategic areas, to gather information or conduct research. Your internal committee serves as a single source of truth about institutional knowledge and strategy. Even if you do not have the resources to put together a digital strategy working group, here are a few questions that you can ask yourself to hit the ground running with a successful digital strategy plan.

- What does the audience need from us?
- Are our existing tools, systems, and processes well integrated?
- Are there opportunities to consolidate existing systems?
- Are there tasks that are being performed manually that could be automated or made more efficient?
- Can we answer questions from leadership with the information that we're getting out of our systems?
- Do we trust our data? What do we do if we don't? How can we ensure that we do?
- What team and skills do we need to reach our organizational goals?
- What is the problem that we're trying to solve with this activity or system?
- How can we ensure that we adjust or pivot when we are not getting the results that we are hoping for?



Addressing Organizational Change Management

A digital strategy is also a change management plan. It needs to be updated and reviewed regularly, and it needs to address four key components of change management: people, architecture, routines, and culture. These elements should be considered within the context of a digital strategy in order for it to function effectively.

People

Digital doesn't run itself. As you implement new technologies, you need people to manage them. Do you have enough capacity for digital content production? What skills do you already have on-staff? What do you need to hire or train for?

Architecture

Both technical and organizational architecture have huge implications for digital strategy. What are the most important integration points between systems? Do those already exist or do they require custom development? Is the governance of your digital properties clear and well-documented? Who is the point person on digital initiatives – marketing or IT? Do you need to create a digital department?

Routines

It doesn't matter what digital strategy you put in place if your team can't see how it fits into their daily routine. What new workflows do you need to implement to optimize new systems or bring new ideas to life? Do you have regular meetings to review progress against your strategy? How will you ensure that you work across teams to get tasks done efficiently and effectively?

Culture

Organizations with effective digital ecosystems embrace change and experimentation. They try new things and pivot when they don't work. When done well, experimentation can help you build the case for the ROI of digital initiatives within your organization. Are you clear on what success looks like for every project? Is it ok to fail? How do you help your teams achieve success and impact? Is your organizational leadership modeling the traits that you want the whole team to adopt?

Building Buy-In Within Your Organization

The process of developing a digital strategy is as important as the end product. Start by gathering the right people around the table. Form a core project team of five to seven people who have the bandwidth to engage in the process and who are senior enough to have decision-making authority.

It's critical that this group have equal representation from the departments most impacted by your organization's digital strategy – such as marketing, IT – as well as communications, membership, and development. In addition, you'll need to identify an executive sponsor who will provide support as you push for change and buy-in, and a project manager who will be responsible for ensuring that the process is carried out correctly and completely.

You'll also need to set expectations with your senior leadership so that they understand the process and when they'll need to be involved. A "RACI" matrix, which defines who is responsible, accountable, consulted, and informed, can be helpful in outlining opportunities for input and decision-making authority.



Getting Support: How to Write a Digital Strategy RFP

While development and execution of a strong digital strategy can be done internally, large nonprofits, foundations, and associations are challenged with siloed departments and processes that can make digital strategy development difficult. Pre-existing professional relationships and miscommunication around who is responsible for which portion of a plan can also play a role in slowing down the process.

Partnering with an external expert who specializes in digital experiences and technologies can help you conduct unbiased and effective market research, align internal teams, and ask the questions that ensure that all voices and needs are taken into account.

If you are considering working with an agency partner to develop or update a digital strategy, here are the key areas you'll want to prepare in advance so that they can provide you with an approach and plan.

Write a problem statement. Defining the problem that you're trying to address will help potential partners develop more thoughtful responses. The problem should be more than just that your website is old. What is the impact of your website being outdated?

Share your organizational goals. Articulate these clearly, in addition to your communications and marketing goals. The more details you include, the more specific responses you'll get. Include what you are hoping to see as outcomes of the work as it directly affects the issues you are looking to solve.

Identify existing research. If you've just done a rebrand or have conducted lots of audience research, make that clear in the RFP so responses can focus on the primary areas that need to be developed.

Share a budget range if you have one. Most consultants can scale levels of effort up or down depending on budget, so go ahead and let them know what your expectations are (even if it's a big range).

Define your terms. There's a lot of jargon in the digital space, and the same words can mean different things to different people. Write as simply and as specifically as possible, and when in doubt, define what "stakeholder" means to your organization.

Put any deal-breakers on the table. Do you absolutely have to get a strategy finalized before a big board meeting next spring? Or is changing CRMs off the table because you just signed a five-year contract? Get that information out early so that consultants can design a project around the things that are important to you.

Describe your internal capacity. Do you have an in-house creative production team or are you a digital team of one? Knowing what kind of internal capacity and skill sets are available to support this effort will help steer the response toward the right level of effort.

Describe related projects. If you're replacing your CRM or rebranding at the same time as you're re-thinking your digital strategy, let potential partners know.

Executing Your Digital Strategy Plan

Once you have all your plans in order, it's time to begin putting your plan into practice. You can approach your strategy in an agile way, working on various elements over a defined period while determining what is working well, what needs improvement, and areas where you need to consider different approaches. This will help you maximize your resources and ensure that you are being both proactive in your approach and reactive in your implementation.

For the first six months, revisit your strategy every two to three weeks to determine if you are meeting your goals and if your messaging and content is performing as you are hoping it will. If you are creating a stakeholder team, gather input on adjustments and optimization of your plan.

To learn more about digital strategy best practices, and/or discuss a specific strategy you are looking to develop, get in touch at inquiries@forumone.com.





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