Technology Implementation: Steps for Success

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(Editors Note: NCFP is pleased to host this blog from our 20th Anniversary sponsor, Foundant Technologies.)

Picture this: you search for months to find the right solution to help you and your board become more efficient at grants management, financial reporting, and project management. Finally, you've done all the research, run all the numbers, and taken all the necessary steps to move forward. You jump in with both feet, invigorated by the panacea to all your board management challenges. You input all the information needed to make you the smooth running machine you know your board can be. Then, two months later, nothing. All that hard work and money for your shiny new software to sit dormant, gathering dust like an old souvenir.

What happened? You *know* it was the right fit. So, why didn't it work the way you'd planned? Chances are, your grand plan fell apart at the word *implementation*. The best software solution in the world won't walk in the door and magically make you and your board use it. But, there are some solid steps you can take to correctly implement new technology the first time around.

6 Strategies for Success

1. Choose a Partner, Not Just a Vendor

You can set yourself up for success by making smart choices about the company who provides the technology you rely on. References, reviews, and case studies should be your first stop during your technology buying journey. They'll help you understand what it will be like working with a vendor, what they have been able to do for other organizations, and whether or not they'll be with you for the long haul. Above all else, you deserve great customer service, and shouldn't settle for anything less.

If a vendor's support is a necessary element, the best way to be sure you are choosing the right vendor is to ask for references. You should feel comfortable asking to speak with as many people as it takes to give you confidence. If you can find references through back channel sources that are not provided by the vendor, these are often the most insightful.

Mark Larimer, VP of Client Success | Foundant Technologies

From: Adopting New Technology, an Exponent Philanthropy Resource

As a member of NCFP's extended network, you have the wonderful benefit of all the other family foundations who may have made a similar decision at some point. Reach out and ask for recommendations or "learned the hard way" lessons on which vendors are truly long-term partners in their success.

2. Communication

Start with a little show-and-tell. Show your board the solution you've decided to implement and explain the features, how it works, and how you envision it helping. Then, allow them time to tell you what they think, ask questions, and experiment with the technology. If you've been working with a vendor, they should be able to join you to explain some use cases and how they've seen other organizations use the same software in similar situations. There's nothing like real-life examples to help illustrate what a new piece of technology will mean for you and your team.

3. Plan of Action

Have a solid plan of action, not only for how you're going to implement new technology, but also how you're going to keep it sustainable as your needs change. Think short term objectives that clearly translate into long term goals.

If your goal is to have everyone up and running within six months, then you should outline – in small, actionable steps – what that will look like. That way, the rollout won't overwhelm your board or any one individual.

A high stakes technology solution should have great customer service and support to help you set these goals and implement them. Don't reinvent the wheel! Ask your vendor for best practice advice. Chances are, they've seen success with other clients' and can give you some tips. Then, adjust and adopt it as your own.

4. Training

Family board members will feel less overwhelmed and be more likely to adopt new technology when provided with training that is relevant to their role as board members. They do not need to know all nuances. Although your team doing the day-to-day work of the foundation may be most excited about the added efficiencies and streamlined processes, sharing those details can make the change feel bigger than it actually is. Instead, focus on what impacts them directly, such as information that will be delivered to them in a new format and the exact steps that are required of them to reach that information.

Also, keep the length of time between meetings in mind. Training provided at your meeting in January will be fuzzy at best when it comes time to meet in April or July. Consider creating a short training video that is specific to the Board member role, and delivered in a positive voice. Your vendor should be able to help you with this.

The people who have regular contact with the new technology will need a deeper level of training. As your staff or family members train, have them jot notes on what they did. Then, you can come together as a group and "formalize" everyone's notes into a "guide" for future reference. This will also be helpful for current team members down the road who've forgotten key steps, or if you have a change of staff.

5. Maintenance

Keeping your solution clean and up-to-date is essential to lasting success, but it's probably not going to happen automatically. Set calendar reminders for you and your team to clean up your files, make sure completed items are marked as such, and check to see if there have been any updates to the system you've missed. Technology companies usually have, at the very least, release notes available for you to read through as they complete software updates. Often, they also offer live webinar demonstrations to walk you through the most recent changes. Don't hesitate to contact support if you don't understand what an update means or if you need further explanation.

Maintenance shouldn't be a once a year, "spring cleaning" kind of effort. It's much more difficult to look back at a year's worth of work than it is to do a quick check-in quarterly, or even monthly, to keep everything up-to-date and in-line with the processes you've put in place. This is also a prime opportunity to catch any mistakes or instances of misuse and correct them before they become a bigger problem.

6. Review

There were goals that drove you to first consider new technology. These goals are unique to your family foundation and may be hard and measureable, or experience-focused reasons that are more difficult to measure. The important thing is to keep track of what those goals were and revisit them at intervals to see how things are measuring up. Mission accomplished on a goal? Celebrate and create a new one.

Some example goals we have heard from family foundations are:

- Reduce from 10 steps to under 5 steps to create a board book
- Go paperless (or at lease reduce the amount of time spent at the copy machine)
- Board members can access applications or summaries no matter where they are located
- Eliminate the burden of printing and mailing applications for both the applicants and staff
- Reduce the number of unqualified applicants who submit requests
- Applicants become more timely submitting their reports

Purchasing technology is not unlike tracking the outcome of your grants. You had dollars going out with the purpose of affecting change or improving the world in some way. Your technology purchases should be held to the same high standards. Regardless of how much or how little time and money you spend on new technology, it should be worth the investment.

Finding an experienced vendor who understands your needs and will be there for the long haul is a top priority for ensuring you'll be able to implement your technology solution successfully. They should be able to give you real-life examples of how others have done the same thing. If they can't do that, move on.

Good luck on your technology journey!

(Foundant Technologies currently works with more than 1,400 grantmakers and grantseekers to help maximize the impact of the philanthropic community through affordable, intuitive, powerful technology solutions. Reach out today, to learn more about how they have helped other family foundations just like yours.)

About the Author

Foundant Technologies' only focus is the philanthropic community. We are solely dedicated to delivering practical, user-aligned, cloud technology, and expertise for funders and grantseekers who want to free-up time to focus on their missions. And we back that with unprecedented service and support.