

MEMBERSHIP ORGANISATIONS
AND CHARITIES:
DIGITAL CULTURE GUIDE



CREATING A DIGITAL CULTURE

Getting stakeholder buy-in for digital transformation



When we wrote this guide to creating a digital culture, things looked very different. None of us could have anticipated that we would soon find ourselves amidst what looks set to be the most transformative and disruptive event in living memory. Managing the impending fallout from Brexit was top of most organisations' agendas, which seemed quite enough to be getting on with.

We intended to address the particular challenges we know that charity organisations experience when attempting to secure buy-in for digital projects. For some of you, social distancing measures and the many levels of separation that they impose – both physically and emotionally – will have made this an even more challenging task than before. Your organisation may currently be operating with reduced budgets, or resource or time, or all of this and more.

People should always be central to your thinking, but they need your support and consideration more than ever right now. Remote working, employment insecurity and financial concerns put additional pressure on individuals both inside and outside of your organisation. The digital experience of your supporters and fundraisers has gained new significance, with the loss of face-to-face interaction.

Having a digital culture and mindset is no longer optional, which is why it's so essential to face challenges head on and take time to proactively engage your stakeholders.

We have been deeply encouraged by hearing first-hand from many charities that are forging ahead with digital initiatives, despite the unprecedented challenges they are experiencing. This guide lays out what we believe are the key steps to ensuring the successful implementation of such projects, and we hope that you find it informative and of value.

Success has never been so closely tied to the effective digital experience of your supporters. Now is the time to get it right.

Alan Perestrello & Gavin Pollock

Co-Founders and Directors

Trillium X



Digital transformation is more about people than it is technology.
A digital culture is about ingraining digital processes and technology
into your business so it becomes 'how you do things'.

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Your digital transformation programme depends on getting your internal and external stakeholders to buy into it. **Everyone from your members and donors to your board of trustees needs to be with you on your journey.**

Getting buy-in for your digital transformation programme can seem like an impossible mountain to climb – but it isn't.

Here are our top tips for successfully engaging everyone from the board to your support team.





#1

COMMUNICATION IS KEY

Lack of communication can derail your transformation programme, so share as much detail as you can with your organisation. The challenge here is knowing your audience and using it to your advantage. Engaging your board is different to updating your employees, so you need to communicate the right message, to the right audience, at the right time. You need an internal communications plan to ensure engagement with your programme at every level.

Aika Peto, Head of Marketing at Trillium recommends:

"You need a plan to communicate your digital transformation to your stakeholders – internal and external. Consider which stakeholder group needs what information and the best channels to deliver it. Your board might need a regular report, your staff might need face-to-face briefings and regular email/intranet communications. Keeping everyone focused and with their eye on the next objective is imperative to foster true digital thinking in your organisation."





1.1

BOARD OF TRUSTEES – THEY NEED STATISTICS

Digital transformation programmes can involve significant investment, so it's understandable that the board needs confidence that the investment will generate a return. Be sure to back up your data with statistics, including data that illustrates increased revenue, engagement, retention and social impact, as well as reduced administration costs. If you can include a competitor success story, well that's the icing on the cake.

Similarly, buy-in from the board will depend on your ability to demonstrate how your objectives will be met. For charities and membership organisations these will likely be centred around driving efficiency and increasing retention. Consider sharing data such as forecast revenue from a new fundraising platform; % of actions completed online (and how much this saves on administration) or how members or donors accessing content online will increase satisfaction and retention.



1.2

YOUR EXECUTIVE TEAM – THEY NEED TO COMMIT TO CHANGE

While your digital transformation programme was probably initiated by a member of your executive team, that doesn't necessarily mean that they have all bought into it. A recent Econsultancy study* suggests that as many as 1 in 5 executives think their current digital transformation programme is a waste of time.

For membership and charity organisations, we often find that it's especially difficult to get buy-in from finance directors. Where resources are stretched, finance directors are unlikely to endorse projects where they don't see immediate Return on Investment (ROI). Luckily, it's not as difficult as it sounds to demonstrate ROI from digital projects.

Starting small is a tried-and-tested approach in securing board-level buy-in. Break your digital transformation programme down into smaller projects, deliver quick wins and communicate your results. Demonstrating ROI for smaller projects will in turn enable you to build trust and more easily secure buy-in for larger projects. Digital thinking is about iteration. Not every project will be a success but sharing learnings from each will help to retain trust.



1.3

YOUR MANAGEMENT TEAM – THEY NEED TO FEEL INVOLVED

Managers often feel like change is happening without their input. This can make their motivation to support your transformation programme very low – a feeling which they will pass on to the rest of the business. If the transformation programme means that their teams will be restructured, let them know early on. If their job title will change, keep them informed.

You should engage your management teams as soon as possible, before you begin your project. Ask them to obtain feedback from their team on current systems and processes and what could make their jobs easier. Better still, involve them in designing the future shape of their organisation and the role of their team. It's much easier to sell a change to your management team when they are involved in developing it!





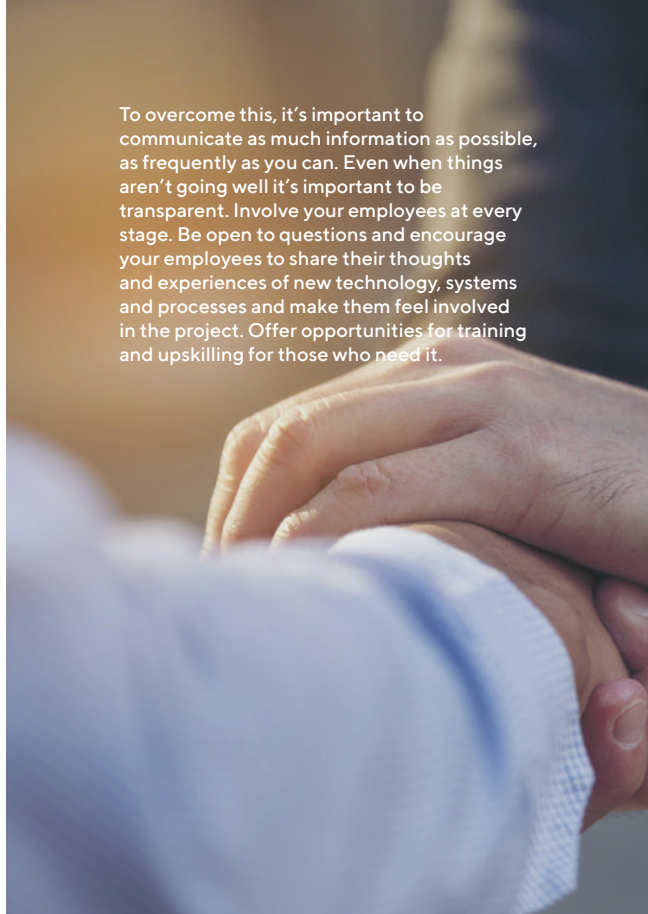
1.4

YOUR EMPLOYEES – THEY NEED TO FEEL SECURE IN THEIR ROLE

If you haven't achieved buy-in from your management team, chances are the rest of the organisation will be feeling less than positive about the digital transformation programme. Negativity spreads like wildfire so you should nip this in the bud early on.

In charities and membership organisations, much of this negativity comes from fear of no longer having the skills to do a job they've been doing for 20 years; their role changing so much it becomes unrecognisable; or fear of losing their job altogether.

To overcome this, it's important to communicate as much information as possible, as frequently as you can. Even when things aren't going well it's important to be transparent. Involve your employees at every stage. Be open to questions and encourage your employees to share their thoughts and experiences of new technology, systems and processes and make them feel involved in the project. Offer opportunities for training and upskilling for those who need it.





1.5 YOUR MEMBERS, SUPPORTERS AND DONORS – THEY NEED TO MAINTAIN CONFIDENCE IN YOUR ORGANISATION

This is perhaps the trickiest to navigate and ultimately the most important. Putting your users at the heart of your project is vital. You should be ready and able to demonstrate how your members, donors, beneficiaries, volunteers and supporters will benefit. Will response times be quicker? Are you developing a portal for them? Will your members be able to renew online? If so, tell them!

You should get your external stakeholders involved through surveys and focus groups before embarking on your digital transformation journey. They're the ones using your digital services – or not – and will therefore have important insight into what does and doesn't work for them.

Your digital transformation programme may have some negative impact on your members, beneficiaries and supporters along the way. If you're taking your website down, plan it in advance and communicate it frequently – send emails, post it on your social channels, send a letter if you must. Communicate regularly and thank your supporters repeatedly for their patience.



#2

CHANGE IS INEVITABLE

A Digital Culture is a Change of Mindset

Digital transformation is 80% people/20% technology according to Dan Ilett, who has led digital transformation projects for the likes of Virgin Money, British Government in China and financial services organisations over the last 10 years.

He said, "It's no longer a case of the CEO saying 'this is our three-year strategy, now go and deliver it.' By default, transformation has to be iterative. It's all very well having that three-year strategy, but your journey should be about making incremental changes – testing, checking and tweaking. When you've seen results from one change, move onto the next."

We're in the middle of the fourth Industrial Revolution, which means that new technology is being introduced all the time. Change is therefore inevitable, and organisations in every sector must be adaptable. Membership organisations and charities find change especially challenging – it's an issue we encounter with almost every client. Not only are you changing your systems and processes, you're changing your culture. Organisational culture plays a much bigger part in your transformation journey than technology, and this culture change has to be driven from the top.

Alan Perestrello, Director and Co-Founder at Trillium believes:

"By creating a 'digital first' culture in your organisation, you can adapt, change and improve experiences for your members, donors and beneficiaries."





#3

DON'T PROMISE THE WORLD

When planning a digital transformation programme, it's essential to set realistic goals. You want to deliver immediate benefit to your members, donors, beneficiaries and your board to keep everyone happy, but that can often lead to over promising and under delivering. An effective approach to mitigate this risk is delivering in a series of short-duration activities that will generate regular and rapid results.

Our client, The Wine & Spirit Education Trust (WSET) are in the middle of a digital transformation journey that covers their CRM, website (front and back end), renewals, LMS single sign-on and a new user portal. They acknowledged from the outset that digital transformation never really ends, so they're building a solution that can evolve as their business changes. Rather than having one overarching goal, they are delivering quick results as the programme progresses. This is helping to build trust and understanding across the business. Many organisations follow an MVP (Minimum Viable Product) approach to keep momentum – vital to ensuring your programme doesn't grind to a halt.



WSET
WINE & SPIRIT
EDUCATION TRUST





#4

YOU CAN'T DO IT ALONE

Even if you have the most skilled tech and digital team, you can't go through digital transformation alone. You need external partners with you on the journey. A great digital partner will challenge your thinking, help you to navigate stumbling blocks and support you in securing buy-in from your stakeholders.

Thirtyone:eight's rebrand is a great example of this, winning the 2019 Association Excellence award for 'Best Lobbying Campaign or Advancement of a Cause'. We worked with them to build a new website that would deliver their new and refreshed branding. By getting buy-in from their staff and members they smashed their targets and achieved 10% membership growth in the first year.

Peter Wright, Head of Marketing at Thirtyone:eight said :

"We navigated a rebrand and a new website project at the same time, and without the right partners we would never have been able to achieve it. Keeping our teams and members in the loop at all times was a huge part of the project – communicating wins along the way and sharing setbacks meant that everyone remained engaged and involved in our exciting journey."



CIEH was going through a fundamental transformational change programme. We required the development and implementation of an organisation wide digital transformation strategy to support the delivery of this.

CIEH needed to update and innovate to have a sustainable future. We knew the right internal technical platforms and partner were critical. They would help address the lack of collaborative working, speed up and simplify relationships with customers and members and facilitate new ways of working.

Due to scarce internal digital skills, the strong relation we developed with Trillium was essential. We trusted them to know the best way to support us, even when we didn't know ourselves.

It can be seen as a risk to use one supplier for both your CRM and CMS, especially as an SME. However, I believe that forming a relationship with one partner, rather than two vendors, is ultimately what enabled us to successfully deliver the right digital transformation for all our stakeholders needs.



Anne Godfrey,

CEO, The Chartered Institute of Environmental Health

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pact.





We deliver digital transformation for membership and charity organisations.
By bringing together Strategy, CRM and Digital, we transform the entire user experience.

Change doesn't come easily. Achieving successful digital transformation starts with choosing the right partner to help you every step of the way.

Get more guidance

Get in touch to discuss your digital journey:

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