



Digital strategy design:
a step by step
guide for charities

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Introduction



Why charities need a digital strategy

Digital culture and technology are all around us, defining our staff, supporters and beneficiaries, and shaping how they interact with organisations and brands. As non-profits, we need to be ready and equipped to operate in this world.

In theory, the use of digital should be intrinsic to the way non-profits operate and speak to their audiences. But we all know this isn't the case; our [2018 Charity Digital Survey](#) showed that 58% of charities do not have a digital strategy. The [Charity Digital Skills Report](#) from 2019 also highlights that 52% of charities don't have a digital strategy, an increase on the year before. Many organisations are still reliant on traditional ways of working, fundraising and offering support to beneficiaries, and therefore at risk of lagging behind.



While access to audiences has never been easier and cheaper thanks to digital technology and social media, competition for their attention and engagement has never been harder. We are now vying for attention in the same arena as bigger, more known brands. And the fact that we are not-for-profit organisations doesn't mean that audiences will be any more willing to go the extra mile in order to hear our message or to give us their time.

We are also living in an age where technology is quickly evolving, providing us with new applications and productivity tools and offering new ways to provide services that couldn't have been conceived 10 or 20 years ago.

The reluctance to embark on the process of developing and implementing a digital strategy may be because as soon as one scratches the surface, the complexity of the process can overwhelm. In essence, it's about changing the culture of the whole organisation and balancing a complex set of competing needs and options.

That's why developing a digital strategy together with colleagues is not only very helpful in overcoming the reluctance and fear of change but also essential to ensure that a well-informed strategy is developed and implemented. Through a strategy development process like the one set out in this book, the main stakeholders will get on the same page. They will plan this change together, at the pace that suits the organisation, and ultimately drive it forward sustainably for everyone's benefit based on a clear understanding of priorities, costs and benefits.

Introduction



What a digital strategy isn't

When bundled in with a website project, the development of a digital strategy is rushed and only taken as far as needed – to decide on the website architecture, audience journeys and data flows in and out of the website. But while digital strategy is needed to create a website, it spans wider than that. Digital strategy defines much more, for example the technology strategy needed to deliver your organisation's vision and expected outcomes. This spans across all areas of business – from communications, marketing and fundraising to programme/service delivery, business processes, data strategy, finance, productivity systems, etc.

This is why we present a holistic, whole-organisation digital strategy approach. We aim to provide the building blocks of this digital strategy, with simple frameworks which will help structure your process and thinking.

Our approach also seeks to combine thinking that might previously have been thought of as IT planning with that which is labelled as "digital" in many charities and emanates more from the marketing, communications and digital service delivery parts of the organisation. We do this because we believe that a truly effective digital strategy combines all of these elements in a single integrated plan.

This book can be used as a checklist: it lists all the areas of digital strategy that need to be considered and all the processes that will ensure that you've gone about digital strategy development in the right way.

We also encourage you to do your research outside of this book – any digital strategy should be considered in the context of the wider sector and current trends, so we've included an array of further tools and resources to consider in your planning and when making your case.

Also woven throughout any digital strategy process should be the engagement of stakeholders, so we've also included tips on the internal insight you'll need to help gain the support of colleagues and trustees and keep their perspectives at the heart of solutions.

To round off, we've provided guidance on how you can prioritise the different elements of your digital strategy into a time-phased plan.



We present a holistic, whole-organisation digital strategy approach





Digital strategy building blocks: Step by step guide

The steps in this book provide a practical guide to developing a digital strategy. At times the work involved in this might appear overwhelming, particularly for a very small charity.

However, in practice a lot will simplify as smaller organisations will tend to have fewer existing applications and infrastructure and a smaller spread of business processes.

In a larger organisation it will help to combine resources with team members to complete the digital strategy planning process, combining specialist infrastructure and application knowledge with expertise in service delivery, marketing, communications and fundraising.

Digital strategy building blocks: Step by step guide

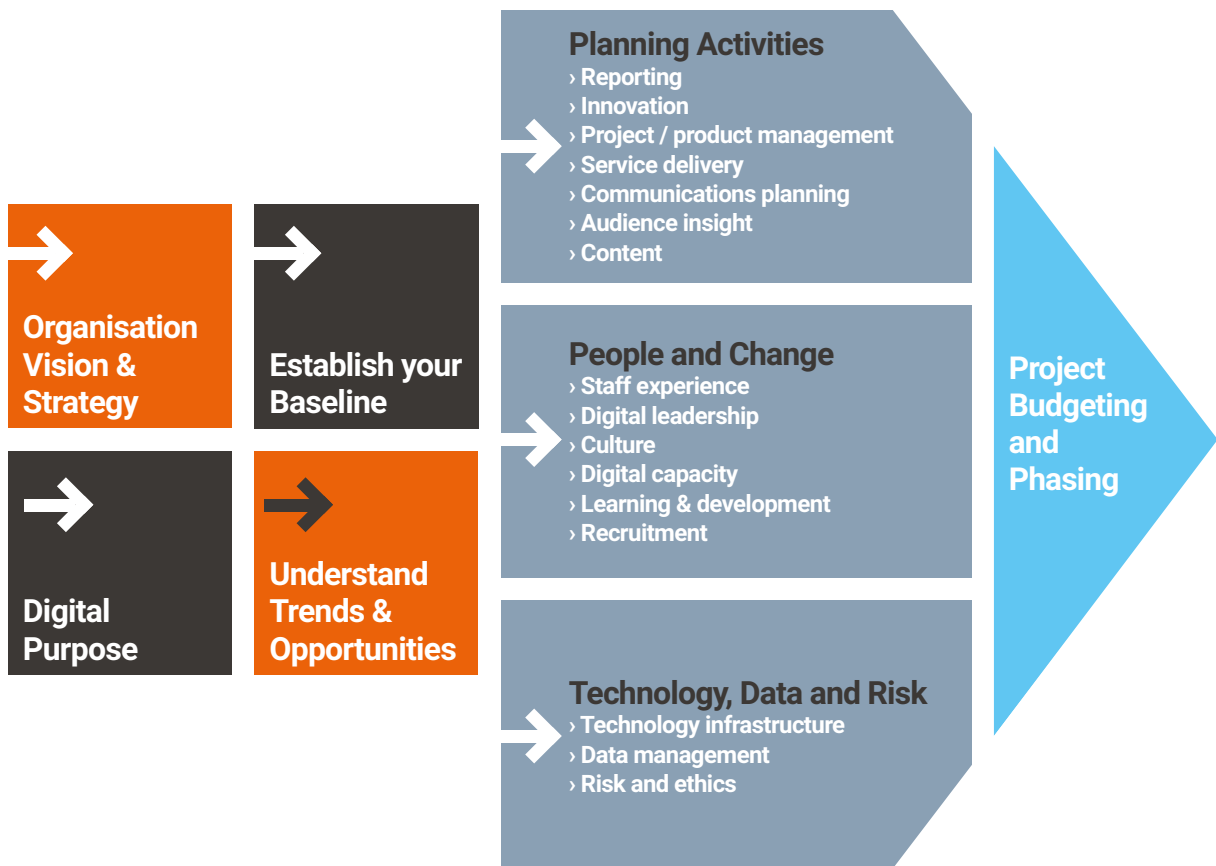
Introducing the digital strategy planning process

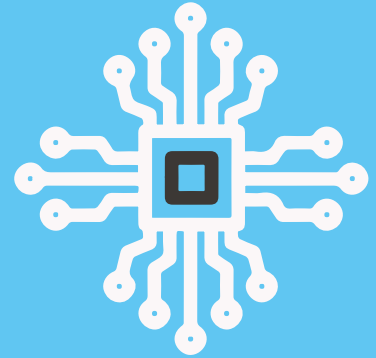
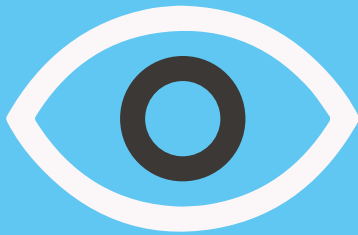
The digital strategy planning process follows seven steps which we will explain. These start on the left by confirming the vision & strategy of the organisation and identifying the main purpose of digital but then move through stages of understanding the current situation and opportunities better (Establish your Baseline and Understand Trends and Opportunities).

We then become more future focused working through three steps which help to establish areas for future development: Planning Activities, People and Change, and Technology, Data and Risk. Finally, we pull all the parts of the digital strategy into a coherent plan through Project Budgeting and Phasing.

Each of these sections includes key competencies to demonstrate with examples of best practice, along with questions to reflect on when considering your own organisation, its current setup and where you want to be.

Fig 1: Typical project flow, from vision to phasing





Step



Vision, digital purpose and business processes

Step 1: Vision, digital purpose and business processes

A digital strategy can't exist in isolation – every digital strategy needs to draw its inspiration from and fit within the over-arching organisational vision and strategy. It is sometimes even argued that there shouldn't be a separate digital strategy as ideally digital should be woven into the core business strategy of every organisation. However, for the purposes of this book we think it is helpful to focus on developing a digital strategy both as a way of building more focus on digital for an organisation which is not yet digitally mature and of providing more detail than will comfortably sit in the over-riding organisation strategy.

In simple terms the digital strategy needs to show how digital will help the organisation achieve expected outcomes. To help in this it can be useful to develop a digital purpose statement. This will provide focus by identifying the main areas of organisational strategy and expected outcomes where digital can make a significant contribution towards achieving them.

Coming up with a digital purpose is an iterative process. Once you start looking at your business processes, analysing technology trends and getting feedback from stakeholders you will see emerging themes and can start crafting this statement. But it will change as you test it with people and get further feedback. The final statement will be one where priority for digital strategy is identified by how achieving those objectives will help deliver the organisation's strategy and outcomes.

Here are some examples of digital purpose statements:

Example 1: The organisational strategy for Charity A is to eliminate poverty internationally. From this ambition flow both the Digital Purpose and the Key Performance Indicators:

Digital Purpose	Key Performance Indicators (KPIs)
<ul style="list-style-type: none">› Acquire new and retain current supporters and facilitate long-term engagement in order to help us raise funds and influence governments and institutions that keep people in poverty› Improve efficiencies in the head office and overseas in order to maximise the use of our human resources	<ul style="list-style-type: none">› % new leads coming from digital (shows contribution towards income and public pressure in the campaigning and advocacy work)› % of overall individual income coming online (shows contribution towards income)› Number of campaigning actions (shows contribution towards advocacy/influencing objectives)› % reduction of time spent on manual tasks (e.g. data entry, simple reporting, donor thank-you comms, expenses claims, payroll processing, recruitment management, etc.)

The part of the Digital Purpose Statement after 'in order to' is where you provide the link to the relevant part of the organisational strategy, its outcomes and vision. The KPIs (Key Performance Indicators) and key results then help bring this ambition to life, by demonstrating whether you are achieving this digital purpose.

Step 1: Vision, digital purpose and business processes

Example 2 (Charity B):

Digital Purpose	Key Performance Indicators (KPIs)
<ul style="list-style-type: none"> › To significantly increase and widen the reach and speed of our service delivery, leading to: › A reduction in people living with a condition, in certain situation. › Improvement in lives of people living with a condition, in a certain situation › To improve the efficiency of all work leading to: › An increase of time spent on testing and data analysis in order to increase the capacity for the delivery of services, products and business processes 	<ul style="list-style-type: none"> › Online service delivery users year-on-year % increase (shows contribution to the user reach objective) › % of people reached who have been helped online (shows contribution towards the breadth and diversity of the user reach) › % of users from a new group (shows that new/ different demographic has been reached via online channels) › % increase in product take-up (conversion rates) › % increase in number of cases processed (e.g. phone calls, assessments, support meetings, medical interventions, etc.)

Example 3: Charity C has a vision of a “world free of disease X” and a mission to “support people affected by disease X to lead independent, active and fulfilling lives”.

It may not be possible at an early stage to articulate a digital purpose, in which case, it is best to initially focus on understanding the organisation’s goals and KPIs (below) and then through the succeeding stages of this book build out the digital elements.

Charitable Goals	Measurable Success Dimensions	Key Performance Indicators (KPIs)
<ul style="list-style-type: none"> › To increase community reach, including people with disease X, families, carers, health professionals, volunteers and employers, and build partnerships with like-minded organisations › Expand the range of programmes, workshops and information provided › Enhance and strengthen the charity’s financial viability 	<ul style="list-style-type: none"> › A database of people living in the region with disease X has been completed › There is public awareness of the disease and people living with it feel well supported › Programmes, workshops and other materials support self-efficacy and empower people to make informed choices and to live well with the condition › Organisation C is financially sound 	<ul style="list-style-type: none"> › Membership increase of 50% › Newly diagnosed days held twice a year with positive feedback from participants › A wide range of programmes and workshops are offered each year covering a range of topics. › Feedback indicates high (>90%) satisfaction › Monthly income from regular donors grows each year - from £500/month to £2,500/month › Year-end accounts show break even or a small surplus each year

Step 1: Vision, digital purpose and business processes



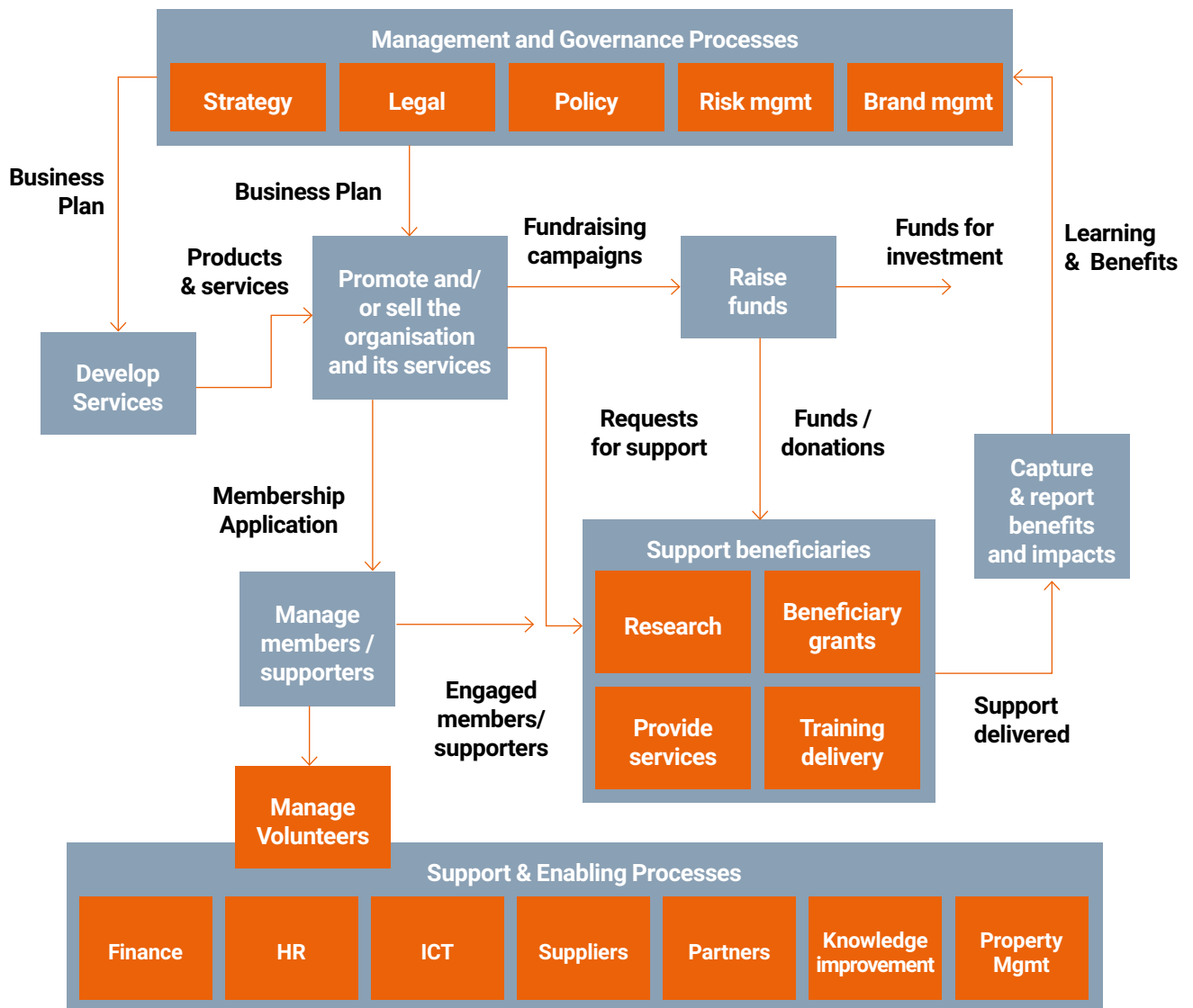
As a final step at this early stage in developing the digital strategy a charity should take some time to map at a very high level their business processes. In simple terms these will comprise three types of process:

1. Processes which support the management and governance of the charity, including risk management, legal and planning.
2. Operational processes of the charity which divide into two key areas:
 - › key activities the charity delivers on a day to day basis such as community services, providing training and education, research etc.
 - › marketing, supporter engagement, fundraising and other commercial processes which provide the charity with the finances to sustain its charitable activities
3. Support or enabling services which include finance, human resources, property and assets

We shall visit them in more detail later in this book, but it is important to understand these as ultimately the digital strategy needs to support the processes of the charity.

Step 1: Vision, digital purpose and business processes

Fig 2: High level charity process map



Questions to reflect on:

- › Is your charity's vision and purpose clearly articulated, along with the KPIs that support its delivery?
- › Do you have a clear picture of the management, operational and support processes that underpin your charity's activities and how they knit together?



Establish your baseline

Step 2: Establish your baseline

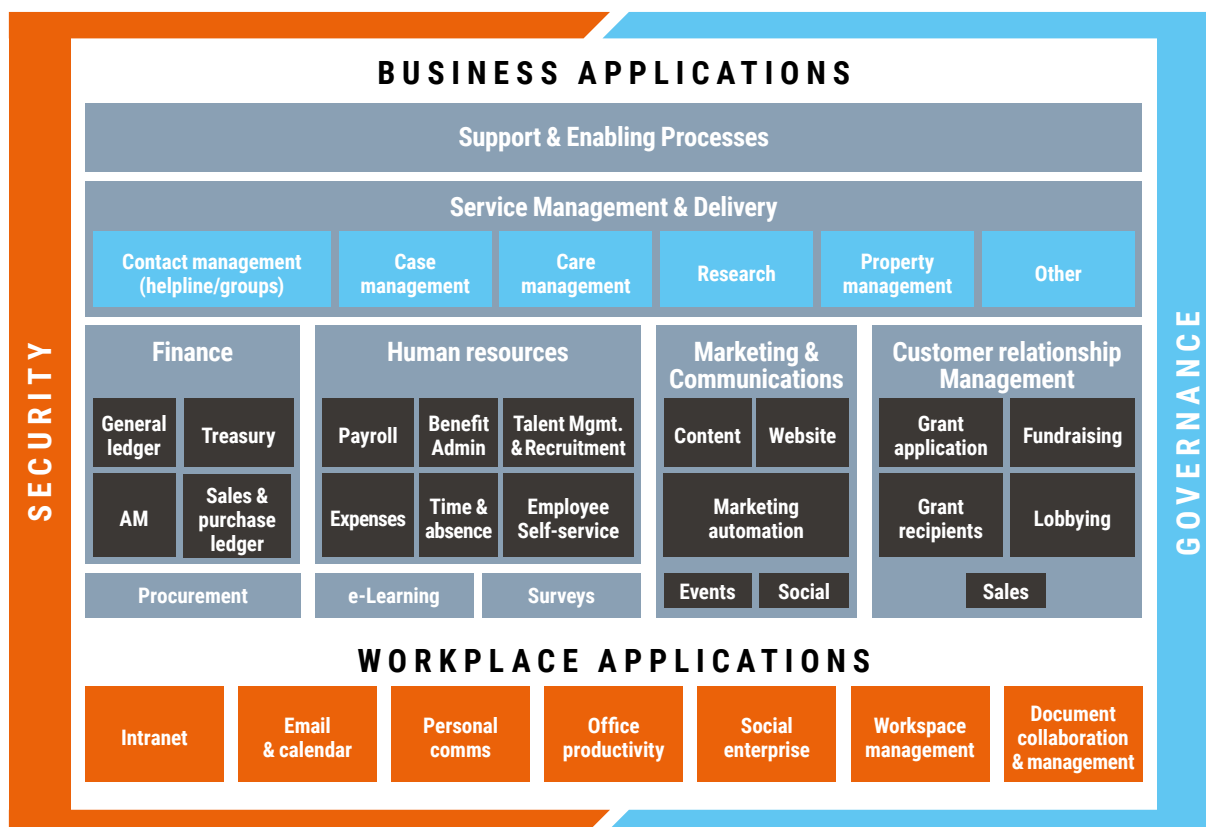
Building internal insight on the current use of digital will help you understand and communicate the status quo, as well as how that matches the external environment and the needs of your stakeholders (colleagues, beneficiaries, supporters etc.)

Internal insight will also help you bring people on board with the digital strategy development process, clarifying why things are the way they are what needs to change. The best approach to building this insight, and to enable a true 360 view, is a combination of mapping digital usage against the business processes discussed in step 1 and the use of digital maturity assessments tools.

Business process mapping

Mapping involves listing the digital applications used to support each of the business processes. For each application you should detail its age, supplier support, future roadmap, impact on strategy and your recommendations for the future.

Fig 3: Charity technology architecture model (applications)

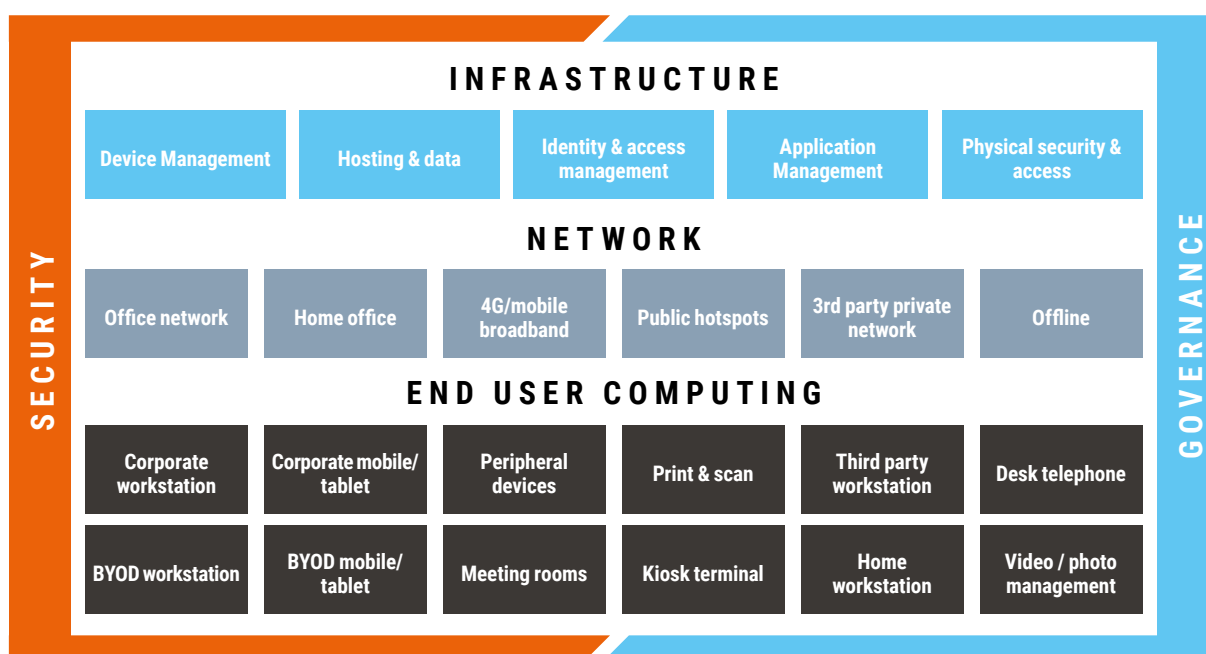


Step 2: Establish your baseline

As part of baselining, it is also worth building a picture of the current digital/technology infrastructure used within the charity. This analysis should include network, server, security, IT administration and productivity infrastructure.

Some of this will be obvious such as desktop equipment, servers used for key applications and your network. But to make it comprehensive think through the infrastructure which supports the key applications previously identified. For example, users being given remote access to systems will be using some kind of remote access technology, telephone-based processes may be using a PABX or VOIP system and employees may frequently access data stored on shared drives hosted on on-site servers. The diagram below provides examples of the types of infrastructure to consider:

Fig 4: Charity technology architecture model (infrastructure)



Finally, in this section also consider how digital technology is governed and supported. This should include both day to day, specialist and project support, end-user training, disaster recovery and IT security.

Step 2: Establish your baseline



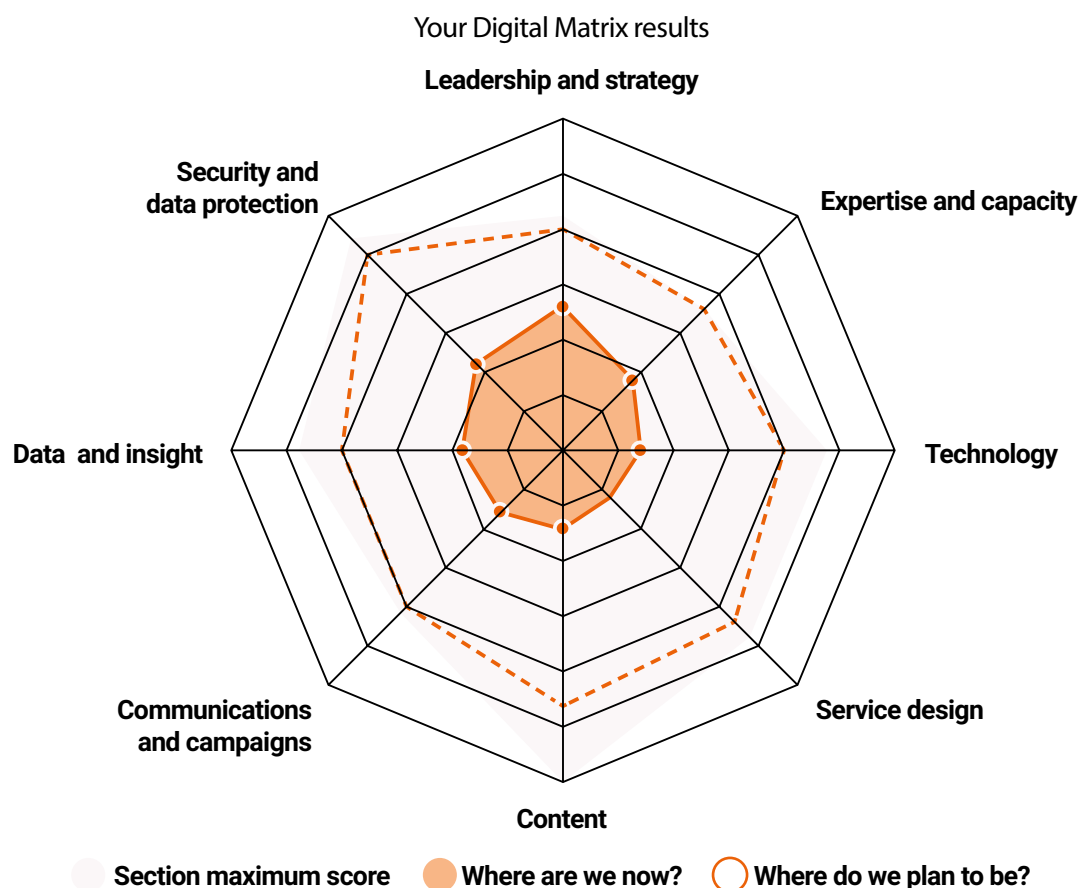
Digital Maturity Assessment

Digital maturity assessment is also a good way of benchmarking your organisation against the rest of the sector, taking into consideration the different aspects that affect digital success. It also helps you measure your progress over time.

While there are countless digital maturity assessment tools out there, we recommend two of the best specialised assessment tools for non-profits:

- › The [NCVO digital maturity matrix](#) – Built in 2015 by the digital team at Breast Cancer Care, this free checklist provides an insight into all the necessary nuts and bolts needed for an effective and successful digital operation, with a score sheet and. The updated version, now owned by NCVO, has been redesigned to be as jargon-free and useful to as many charities as possible.

Fig 5: Sample results grid from NCVO Digital Maturity Matrix tool, mapping a charity's status quo and ambition against a range of core competencies.



Step 2: Establish your baseline



- › [Digital leadership digital maturity self-assessment](#) – Designed to work in conjunction with the framework as set out in this book, this tool is a measure of how ready an organisation is to transform digitally, evaluating them against fifteen key competences. The test is designed to be useful to both digital leaders and those across the organisation.

Digital maturity audits work best when a few stakeholders in the organisation complete the surveys. It's then helpful to discuss and analyse together, comparing the differences in stakeholder responses. By engaging stakeholders you are providing visibility to the digital strategy development process and helping gain their buy-in to the changes that you'll be undertaking.

You use this baseline to set your target digital maturity rating for years 1/2/3.

For example, Parkinson's UK used the overall digital maturity rating to set their targets and bring clarity to the areas of operation they should be focussing on. They also use the digital leadership digital maturity framework to give the whole organisation visibility of what their digital transformation programme is doing and how it's progressing.

In Year 1 they rated their data management at level 3 out of 5. Because data was increasing as an organisational priority for a number of reasons (patient, supporter and research data) they decided to dig deeper and develop a better understanding of their data management needs. They introduced a data maturity programme. When they did the digital maturity assessment a year later, their rating for that digital maturity competency went down – in that year they had understood how much they didn't know and used this as an opportunity to prioritise a range of improvements to data management and use.

Internal insight is an important process and will show what's working well and what's working less well around the three building blocks of a digital strategy set out in this book: planning activities; people and change; and technology, data and risk.

Questions to reflect on:

- › Have you identified all the applications and infrastructure used currently across your organisation, and formed a view of how this technology meets existing and future requirements?
- › Has your organisation been through a digital maturity assessment, and identified the priority areas for acceleration over the next few years?

Later in the book, we'll look at these three building blocks one by one and the digital maturity competencies that sit underneath each one of them.





Step



Understand trends and opportunities

Step 3: Understanding trends & opportunities

In this section we will consider both new technology trends (such as progress in artificial intelligence, increasing speed of mobile devices etc.) and demographic trends which can include both changes in the different groupings in society such as the increasing number of elderly people and the behaviours and preferences of different groups. These trends will present charities with both opportunities and threats.

Opportunities include:

Serve new market niches	for example a charity supporting young homeless people with accommodation and financial counselling might extend to provide mental health and well-being services
Extend geographic boundaries for products and services	a charity providing services in Manchester might decide to extend its reach to areas within 5 miles of Manchester
Create new levels of service expectation	for example offering a same day walk in service where previously all appointments were booked a week in advance
Provide the opportunity to further differentiate offerings	for example by providing a one stop shop for a homeless person to get support on health, housing and financial issues
Reduce costs	for example by automating data entry which was previously manual

Where the opportunities align with the vision and strategy of the charities, thinking can move to considering what needs to be done to address a new opportunity (using where helpful the process model discussed earlier). Some of these changes will be organisational and resource based, but in other areas there will be strong digital solutions that could be deployed.

New technology trends will include areas such as the increasing level of cloud computing; peer to peer fundraising and crowdfunding; business intelligence and analytics (including sophisticated visualisation); increasing online counselling / chat / chat bot opportunities; online gaming; blockchain; internet of things; artificial intelligence; speech recognition and computer vision; cyber-attacks; and data privacy.

Step 3: Understanding trends & opportunities

For each technology trend consider the implications for the charity. These might be compliance actions (as for data privacy) or opportunity based for example:

Increasing Online Counselling / Chat / Chat-bot opportunities	
Online therapy	video talk, voice messaging and texting*
Virtual reality	practitioners and clients feeling like they are in the same physical environment
Therapeutic AI	Website “bots” could provide answers to many general questions

* With traffic costs high in terms of time and petrol Charity X is moving more and more to field workers connecting with service users via Skype or Google Hangouts especially for those in rural areas

Demographic trends are also worth considering. For example, young people under the age of 25 are showing a strong preference for text / chat interaction compared to voice calls. An organisation looking to serve this demographic should therefore consider carefully how its services meet the needs of this demographic compared with other age groups. This could result in services needing to be reconfigured and new digital technology being introduced to support that reconfiguration.

In looking at technology trends and their application to your charity, consider how urgent the trends are and how achievable they might be for the charity to deploy.

External resources

Your thinking in this step is likely to be informed by multiple external sources of information ranging from presentations to whitepapers and research. A word of caution – some will be led by the novelty of a new piece of technology or a new platform, so it's important to drill into the numbers realistically.

For example, it sounds impressive to say that the ownership of smart speakers like Google Home and Amazon Echo has doubled in the UK from 2017 to 2018. In reality, this is still only 13% of the UK population, so it's a trend to watch but, if resources are tight, you might not worry about it just yet. Fixing the donation journey across your platforms may bring much more return on your investment of time and money.

Step 3: Understanding trends & opportunities



Here is a selection of sources that are regularly updated:

For a look at global digital trends, the [We Are Social digital report](#) comes out every January providing good data on take-up of digital in different countries - from internet penetration, use of mobile phones and voice services to online shopping figures and use of social media. For organisations who work globally, or who are looking to provide global services or platforms, this is the one to look at.

Another highly rated report is the [Internet Trends report by Mary Meeker](#) which sets out a good global picture across different areas - from e-commerce and advertising to data gathering privacy and optimisation.

Whitepapers from agencies and research bodies can also provide useful information and data. For example [Nielsen digital insights](#) reports bring in the perspective of consumer – attitudes and behaviours – to the fore.

When it comes to the UK, reliable source of external insight is [Ofcom Communications Market report](#) which has been published for years back so enables some historical insight too. Ofcom has also launched the [Online Nation report](#) which paints an excellent picture on the take-up and use of the Internet and online services in the UK across demographics and age groups.

For insight into charity audiences and their attitudes and behaviours have a look at [publications by Eden Stanley](#). They build their audience insight on the in-depth research they do for clients as well as the wealth of data collected through their charity brand trackers.

For examples of trends in the charity sector have a look at [Lloyds Business & Charity Digital Index](#) which blends transactional and attitudinal online data to benchmark digital skills and capability of UK organisations. The index shows the connection between digital capability and overall productivity which makes a strong case for organisations to digitise their digital services and products.

Government Digital Service (GDS) has fantastic resources for [designing digital service delivery](#). Also follow their [blog](#) for case studies and latest updates.



Step 3: Understanding trends & opportunities

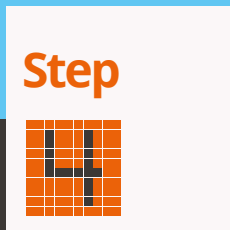
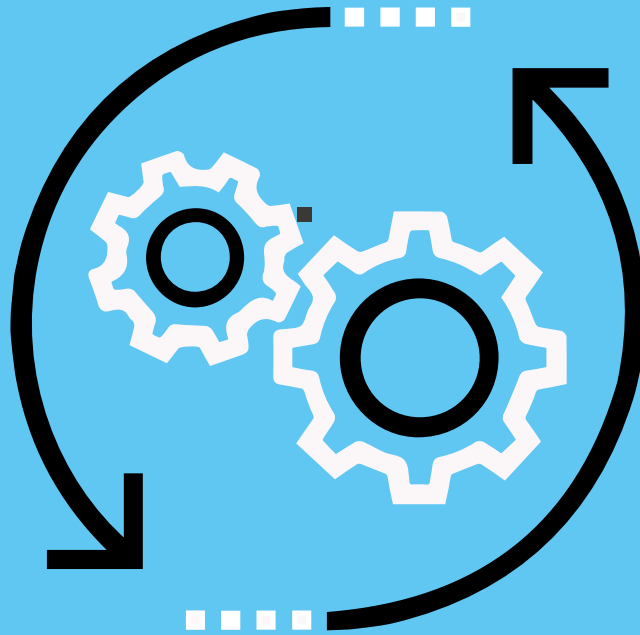


For the overview of digital skills in the charity sector consult [The Charity Digital Skills](#) report – it can provide a good context for your own organisation’s digital maturity assessment results.

Charity Digital News has a wealth of resources including conferences, webinars and success stories from charities leading the fore. The annual Charity Digital [#BeMoreDigital Conference](#) and [Charity Digital webinars](#) are a great way to find out what’s happening in the sector and get a detailed understanding of the ‘how’ of implementation from peers, colleagues and leading charity technology suppliers.

Questions to reflect on:

- › Have you taken time to consider the technological and demographic trends affecting your charity’s area of operation and any opportunities (or threats) they might present?
- › Have you consulted external resources as well as internal data, to ensure breadth of perspective?



Planning activities

Step 4: Planning activities

This step contains activities that can help you to develop an effective digital strategy. It looks at different perspectives including innovation, service delivery and audience insight. It starts by looking at the importance of reporting.

Reporting

Regular reporting against organisational Key Performance Indicators (KPIs) is a part of any management toolkit. Data is used to measure the effectiveness of day-to-day operations to inform decision-making.

Through digital products and processes, organisations can access a myriad of data. But often this data is held in disparate systems and databases, thus not offering a rounded picture of organisational performance. Or ‘vanity statistics’ are reported, such as Twitter followers/reach and Facebook likes/reach, which may be of no serious value.

When planning is based on lessons from previous activity, organisations can learn and improve the outcomes and impact of what they do. Sometimes small improvements over time can make a big change in outcomes.

For example, a better donation page layout can ensure that more potential donors finish off the process of donating, bringing in more money. Or providing additional channels of communication to beneficiaries increases the number of people an organisation can reach with its services.



Often data is held in disparate systems and databases, not offering a rounded picture of organisational performance”

Questions to reflect on:

- › How often are reports of previous activity used in informing a new project?
- › Do you have an easy way of accessing information about your organisation’s performance (e.g. number of people treated/helped, number of donors recruited, number of calls processed, etc.)?

Step 4: Planning activities



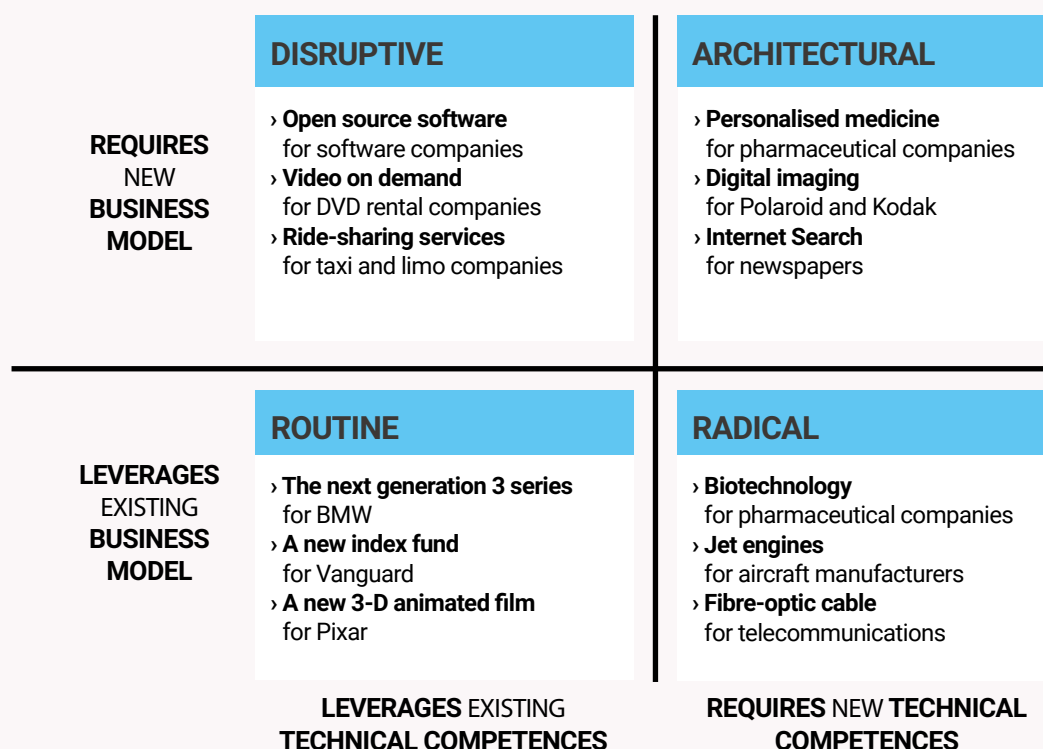
Innovation

The word innovation means different things to different people. Often, it's about finding new, creative ways of communicating an organisation's mission and engaging audiences with established products (like a regular gift, online shop, or petition). Real digital innovation, however, starts with the question: Is there a solution in the digital world (technology, principles, and insight) that will help me reach my organisation's objective/resolve the problem we/supporters/beneficiaries are dealing with?

This innovation landscape map from "[You need an Innovation Strategy](#)" by Corning; Gary P Pisano is a good way of understanding different types of innovation

The Innovation Landscape Map

When creating an innovation strategy, companies have a choice about how much to focus on technological innovation and how much to invest in business model innovation. This matrix, which considers how a potential innovation fits with a company's existing business model and technical capability, can help with that decision.



Source: Corning, Gary P. Pisano | From: You Need An Innovation Strategy, June 2015



Step 4: Planning activities

The biggest challenge to innovation is that it requires a totally fresh look at the problem and putting aside how things are currently done. Often, it's best to start small, pilot projects/new ideas with teams who are keen/ready to experiment, document the process and share with other stakeholders. Nothing works better than FOMO (Fear Of Missing Out) to move colleagues who are sitting on the fence to becoming enthusiasts.

And for the solution to be innovative, it doesn't have to be super-technical. One organisation developed an online form for beneficiaries which cut down the time they had to wait to be assessed by half.

Detailed guide to innovation is available from [CharityComms](#).



For a solution to be innovative, it doesn't have to be super-technical

Questions to reflect on:

- › Where would you put your organisation and initiatives on the innovation landscape map?
- › Do you have an innovation team or innovation project or does innovation happen when someone external approaches you with an idea?
- › Have you been a part of an innovation project where it was understood from the beginning that it may fail?
- › Has there been a project in your organisation where digital solutions were used by a team/individual to find a new way of dealing with (even the smallest) problems?

Step 4: Planning activities



Project/product management

Often, there's a tendency to look at technology and then try to find a problem that it could solve. It is important to start by identifying problems (from a user point of view, whether they are a beneficiary or member of staff) that need solving. Only then is it worth looking at possible (digital) solutions.

Establishing a light-touch project management process will help organisations run projects across teams with consistency. The process needs to cover how projects are briefed, kicked off, scheduled, communicated and evaluated and how roles and responsibilities are shared across teams and the organisational hierarchy.

Product management assumes an oversight of the whole 'product' – from its conception and strategy to development, promotion and user engagement. This approach can be applied to a programme made up of many projects e.g. Customer Relationship Management database implementation or to platform management e.g. email technology management, including development, maintenance, email schedule, quality assurance and user training.

Questions to reflect on:

- › Do the majority of your digital projects come up in response to a user problem the organisation is trying to solve (where 'user' can be staff, beneficiary or audience)?
- › Is the possibility that a solution could be digital considered at the beginning of a project?
- › Are roles and responsibilities clear and do they go beyond the teams/people who have the word 'digital' in their title? For example, are other than digital roles taking on relevant digital responsibilities (e.g. product owner, testing, project management, content creation)?
- › Do you prototype and test new digital products with users?
- › Do you have an established project management approach across the organisation?
- › Are there clear processes and roles in the management of digital platforms?



Step 4: Planning activities

Service delivery

Delivery of services/programmes is increasingly moving online. This provides efficiency (e.g. the ability to provide tailored information 24/7) as well as access to target audiences (e.g. younger people, mobile phone population).

Often face-to-face service delivery can be supported by technology. For example, delivering training via video conferencing or creating an online journey that provides triage so that people get right face-to-face support, more quickly.

For example, Arthritis Research UK (now called Versus Arthritis) kicked off the Artificial Intelligence project with IBM Watson to solve a problem: "...[WE] were eager to serve a greater number of people and provide reliable information around the clock, but remained limited by personnel capacity."

Parkinson's UK has also embarked on a partnerships with benevolent AI with the aim of finding three new treatments for the disease. The way they sometimes describe this idea is – we may already have a number of treatments out there, we just don't know about them because we haven't looked through all the data and evidence. There have been no major breakthroughs in Parkinson's treatments in the last 50 years. If successful, the project would mark a significant advance in the treatment of the disease.

[World Food Programme](#), started in early 2017, distributes cash-for-food aid to over 100,000 Syrian refugees in Jordan. By letting a machine scan an individual's iris, their identity is confirmed on a traditional United Nations database. Their family account, kept on a variant of the Blockchain by the World Food Programme (WFP), is queried confirming that they can make the purchase. The person is able to settle a food bill in the refugee camp shop without opening their wallet. The programme has addressed risks of delays and financial mismanagement but has also saved 98% of the money spent on transaction fees.

Introduction of technology solutions into service delivery enables regular reporting and analysis of service delivery, enabling day-to-day management decisions, forecasting and business planning.

Questions to reflect on:

- › How is digital contributing to your organisation delivering to its mission (for service or programme delivery, beyond communications and fundraising)?
- › Are there any parts of service delivery that are being delivered online beyond information sharing (e.g. web chat, WhatsApp groups, support via social media, etc)?

Step 4: Planning activities



Communications planning

In order to get best value out of digital, organisations need to integrate planning under the same brand (in order to keep consistency across different channels) and become audience-centric in how they make planning decisions (in order to successfully engage audiences where they are).

When this isn't the case, disparate communications have varying levels of impact - some are successful, some bomb. Overall, this means that the effort put into communications and marketing initiatives is sometimes not strategic. Organisations are not learning from previous experience, understanding what works best for their audience or optimising future communications and programmes accordingly.

When organisations plan in an integrated and audience-centric way, communications reach and impact grows over time thanks to gradual improvements based on evidence.

For example, a medium-sized UK non-profit noticed that their Christmas campaign income doubled year on year mainly because teams integrated their plans for the second Christmas campaign.



Christmas campaign income doubled year on year because teams integrated their plans

Questions to reflect on:

- › Is digital considered at the beginning of every project (even if the end result does not include a digital solution)?
- › Are your social media plans based on what teams in your organisation ask you to publish or are they created by putting the requests through the lens of what makes sense for the audience at any one time?
- › Do you have cross-team communications plans which are built around your audiences?
- › Do you have live email journeys for one or more of your audiences?



Step 4: Planning activities

Audience Insight

Using audience insight when planning supporter and beneficiary/client engagement will ensure your organisation's output is effective.

Once objectives in the organisational strategic framework are identified, some organisations will invest in creating and collecting independent evidence of market trends. This is used to develop products and communications which will appropriately engage target audiences.

If your organisation doesn't have audience insight based on market research, looking at reports already available can help. Some sources of audience insight can be:

- Fundraising database audience analysis.
- Brand research.
- Google Analytics data (location, most popular content in a year, donation patterns, and other website demographics can be useful if taken as trends only.)
- Facebook page audience profiles.
- Email marketing stats - looking at most popular email content by clicks and opens.
- Supporter and/or website user surveys.



If you're not targeting the right people, a lot of effort can be wasted

If you're putting in resources to create and put out content, but you're not targeting the right people, a lot of that effort can be wasted. So it's worth thinking about making the case for investment in audience research. For support, have a look at this [free guide for building audience strategy from CharityComms](#).

Questions to reflect on:

- › Do you have audience profiles which are shared (at least) across communications and fundraising teams?
- › How widely is audience insight used in your communications planning?

Step 4: Planning activities



Content

With increased focus on the ongoing engagement of audiences, content (stories, pictures, case studies, research, facts, videos) becomes an essential ingredient when building an audience journey.

With many audiences and many journeys to manage, it's important to make your content work hard for you. Every piece of content needs to answer one of the basic questions of audience engagement: 'What's the problem?', 'Why should I care?' and 'What can I do about it?'

The model below has five bubbles which you can use to help plan content. Under each of the bubbles, you start with a top line message which is the same for every audience and then you drill into further detail which will differ based on:

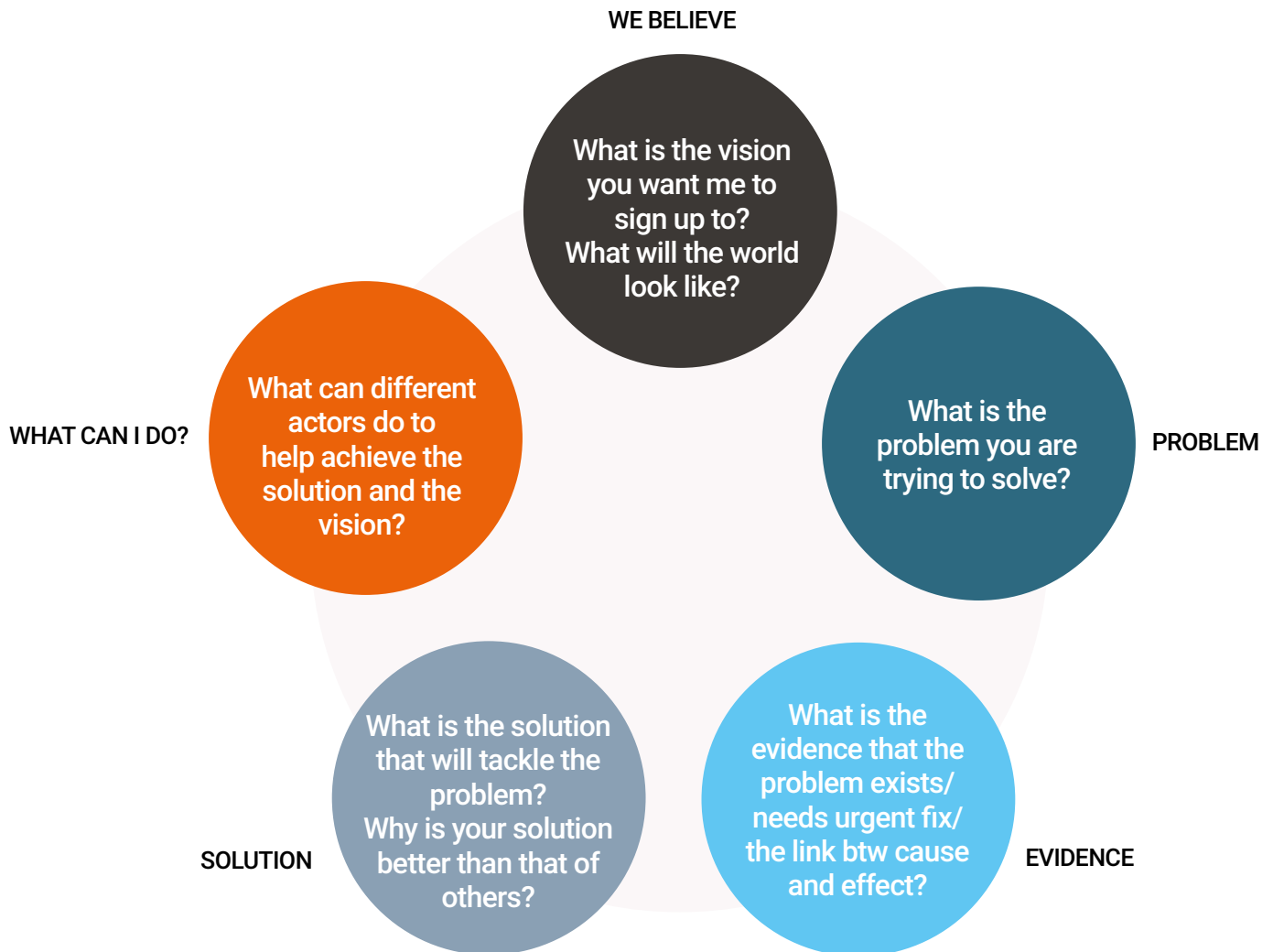
- 1) How aware/knowledgeable the audience is on your issue.
- 2) What role they play in your theory of change (e.g. MPs, policy makers, journalists and public all have different ways of helping you bring about the change you want to see).
- 3) Where they are on a journey with your organisation (have they just joined the journey or have they been supporting your organisation for some/long time?).

For example, evidence you will share with all audiences will be case studies which show how the problem you identified can be solved with your recommended solution. Usually these are stories of how individuals, communities, animals, or nature are effected by the problem and how your work helps them overcome these difficulties.

Detailed research, which demonstrates the wider context and scale of the problem you identified will be mostly relevant to journalists and policy makers and of less interest to wider public audiences.

Step 4: Planning activities

Content Planning Model



Questions to reflect on:

- › Can you answer the key audience questions in the model?
- › Can you adjust the language and the level of detail you communicate to your audiences?
- › Is your content commissioned for specific appeals/projects/campaigns or is it done as a part of a wider content commission to cover your annual communications plan?
- › Do you have roles in your organisation whose main focus is content planning, creation and management?
- › How do you access your case studies – are they visible to everyone in the organisation or do you need to ask someone to find the right case studies for you?
- › Can you trust the accuracy/freshness of your case studies? If not, why not?



Step



People and change

Step 5: People and change

The implementation of a digital strategy is not just about technology. Everyone who has done it will tell you it's about people. Bringing people along is essential, which makes digital strategy implementation also a change management process. And to manage change it's important to communicate a clear vision (e.g. we need to reach more people with our services) to show the

path to that vision (e.g. we've kick started a programme to identify how we'll get there) and to take people with you (e.g. we will work with you and support you in helping the organisation make this change). This is a process and it takes time.



If leaders' commitment to the change process is inconsistent, people won't join in the effort

Therefore consistency in leadership of this process is key. There will always be those who like change and those who don't. If the commitment to the change process by the leaders in the organisation is inconsistent, people will not believe it a real organisational priority and won't join in the effort.

Staff experience

How staff go about doing their jobs will affect the effectiveness of the organisation and its operations. Digital technology provides many solutions to improve collaboration, knowledge-sharing and administration, especially where staff are working in different locations.

Staff and volunteers use technologies in their private lives and, sometimes, this is more sophisticated and efficient than technologies used in the office. Too often, they are spending time on tasks that can be automated, which often leads to frustration.

Changes in how organisations communicate with audiences will lead to changes in business processes and require new/different technology and skills. The introduction of new systems needs to happen gradually, in collaboration with staff but with audience experience at the heart of the process.

Questions to reflect on:

- › Do you have manual processes for activities which you know can be automated? (e.g. copy/pasting of data from forms into a database, manual download/upload of CSVs into an email system)
- › How easy it is for you, your colleagues or your volunteers to book annual leave or to claim expenses?

Step 5: People and change



Digital leadership

Digital leadership is demonstrated by a leader who understands the digital ecosystem, can identify how digital will contribute to an organisation's strategy and builds trust and motivation amongst colleagues so, together, they make the digital vision a reality.

A digital leader doesn't always need to understand how technology works to lead digital change. They can lead using coaching techniques and by relying on the advice and expertise of other staff.

As coaching pioneer John Whitmore writes, if a senior leader is a good coach "they should have no difficulty creating a high-performance culture, whether they have less technical depth or not. As soon as they do this, any credibility gap that may exist in the minds of some of their employees will disappear."

On the other side of this coin are digital people who, when they are in a situation when they have to negotiate and compromise, will default to emphasising their technical skills. But in addition to expertise they need to build trust by listening intently to colleagues'/managers' concerns and responding in a constructive way.

[This short video from Lindsay Herbert](#), author of the book [Digital Transformation](#) also provides a really good description of a dos and don'ts of a digital leader.

Questions to reflect on:

- › Who is leading digital in your organisation? Is it your 'digital person', is it your SLT or your CEO?
- › Are people with digital expertise consulted and involved in decision-making around digital projects/products or activities?
- › Is there a push from the top of the organisation that there is a need to embed digital in everything your organisation does? Or is there at least strong push towards digitising one part of organisation's activities (e.g. fundraising, marketing, service provision)?



Step 5: People and change



Culture

Successful digital strategy implementation requires an organisation to develop the right mindset. This mindset combines three key areas: motivation, behaviour change, ownership and collaboration.

As covered above, strong leadership will create an environment of motivation so charity employees are keen to embrace digital more in order to increase the impact that their organisation has.

One of the biggest behavioural changes to embrace is accepting that digital is a continual learning process both for individuals and for the organisation as a whole. So taking small steps in order to learn and move forward is the right way to proceed rather than always seeking to understand every last detail before making a change. However, to ensure that small steps don't result in slow progress it's important for the organisation to embrace the concept of fast cycle times. So making a small step every 1-2 weeks adds up to a massive change over a year. But if those small changes are only deployed every 1-2 months then the change over a year will be disappointing.

Ownership is about digital becoming a key consideration of everyone's job rather than something thought about by just a central team. In this way the people who are closest to the day to day processes and therefore understand them best become empowered to make changes. This is important to consider when looking at the digital capacity below.

Collaboration is vital for successful digital projects as significant digital changes might involve a process that is touched by many parts of the organisation and need to bring together operational and technical staff to successfully design and deploy new approaches.

A final vital aspect of any successful digital transformation is that it needs to be user led. This means that the needs and behaviours of beneficiaries and other stakeholders need to be the start point for everything. Initially this focus will need to be deliberate, but over time it should become a core part of the culture.

There's lots more helpful information on digital culture and leadership in the [Charity Digital Code](#).

Questions to reflect on:

- › Do you have a culture which encourages experimentation and learning?
- › Does your organisation encourage cross team / departmental collaboration?
- › How much are you putting users at the centre of your digital initiatives?



Step 5: People and change



Digital capacity

To respond to the changes in the external market organisations need to ensure that digital skills and behaviours are a part of every job and are represented appropriately at every level within the organisation. And this doesn't mean that everyone in the organisation needs to tweet. Digital skills need to be relevant to a specific job.

For example:

- › Supporter care could develop skills that give them confidence to manage relevant requests on social media.
- › Designing and managing a digital fundraising email can be the skills of a marketing/fundraising team member.
- › Digital campaign action journey management can be a skill of team members of the Campaigns team.

Digital skills can be developed through recruitment of new people or through staff development and training.

A question that often emerges is where should digital expertise 'sit' within an organisation?

The usual options are:

A central team	A multi-skilled team who delivers digital strategy, technology and product.
Hub and spoke	A central digital team designs and helps the implementation of digital processes and strategies (e.g. product management, recruitment, planning) while digital roles exist in different teams (digital fundraiser, digital campaigner, online supporter care, etc.)
De-centralised	There is no digital team, instead relevant digital roles are embedded in each team, e.g. online development in IT, website editorial and online video in the creative/communications team, analytics and reporting in the data team, etc.

The three models demonstrate the levels of digital maturity an organisation needs to go through. In order for 'hub and spoke' or decentralised structures to work, the organisation needs to have a good set of processes (for planning, recruitment, evaluation), systems (for data, content, marketing) and an established approach to digital product development. All these will most likely be developed by a central digital team over a period of time. Decentralising digital operation without these systems being in place will lead to patchy and siloed digital output.

Charities should also aim to have diversity in the teams who are working on digital projects. This will help to ensure that when thinking about digital developments, diversity of viewpoints is represented. This is particularly important when looking at AI initiatives, where it is easy to unintentionally build bias into algorithms.



Step 5: People and change

While, in the longer term, digital is seen as a given in every job and everything an organisation does, it will inevitably need strategic leadership by experienced specialists to support the organisation through the process of transforming itself in order to adjust to today's marketplace.

Questions to reflect on:

- › How many people across all the teams in your organisation have digital skills/expertise?
- › How many people have taken on relevant digital responsibilities?
- › Do you have clarity on how digital is done in your organisation (for example, process for commissioning projects, reporting, content)?
- › Do you have an agreed set of digital competencies which are a part of every job in your organisation?

Learning & Development

Learning and development is essential for an organisation to become truly digital. Once the digital skills & behaviours needed for different roles are identified, a training programme needs to be developed to support staff, managers and members of the board to enable longer-term transition to a digitally transformed organisation.

Often digital leads in organisations are either not skilled, given enough time, or positioned in the organisational hierarchy to support the leadership in managing change triggered by an all-round digital implementation. It is therefore essential to invest in the development of digital experts into digital leaders to help guide the organisation through digital transformation. Similarly, some leaders feel that they need to have better technical skills, but what is most often needed is an upgrade to their leadership skills so that they can coach their staff to develop the skills needed. This will require a mixture of training the leadership so they are able to coach in the way required and making coaching skills an important part of the leadership recruitment process.



It is essential to invest in the development of digital experts to help guide the organisation through transformation

Step 5: People and change

Questions to reflect on:

- › Is there a budget for digital training which can be used by anyone in the organisation (not just 'digital people')?
- › Are there regular occasions/meetings when people in the organisation can learn about new digital trends?
- › Is your HR or learning & development team looking to develop a programme to build relevant digital skills and behaviours in your organisation?
- › Are you hiring managers with coaching skills or developing the coaching skills of existing managers to fulfil this role?

Recruitment

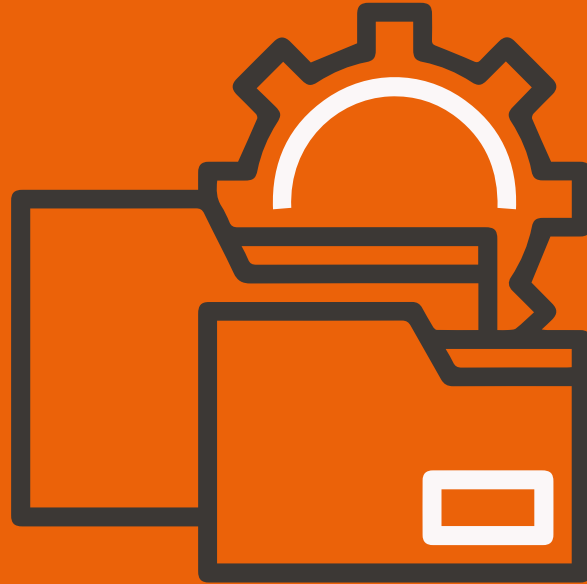
Every job needs to include relevant digital skills. These are the skills which will enable the post-holder to achieve their objectives, in support of organisational objectives. For example, a supporter care manager may be required to manage responses to supporters on social media, web chat as well as on email and on the phone.

Recruitment might be necessary if existing staff do not have the required skill and it cannot be easily developed through training and support.

Salary grades can be an obstacle for recruiting digital talent, especially if grades have not been reviewed with this change in job market in mind. While the right candidate will be the one motivated by an organisation's mission rather than salary, they are unlikely to accept the position that's paid considerably lower than equivalent roles elsewhere.

Questions to reflect on:

- › Do you have a set of digital competencies (skills, attitudes and behaviours) which are required for all jobs?
- › Is your digital lead involved in the job description design and/or recruitment of roles which require digital skills even if the role is in another team?



Step



Technology, data and risk

Step 6: Technology, data and risk



Technology infrastructure

We have already touched on technology infrastructure in Step 3 where we mapped the existing infrastructure. In this section we dig a little deeper into the topic. When developing a digital strategy, it's easy to become focused on the “sexy” areas like digital service provision and digital communications, but it's really important to consider infrastructure in sufficient depth too. This is because if it isn't adequately planned, as the organisation becomes more digitally sophisticated its demands on the underlying infrastructure will increase and the infrastructure will start to become a constraint on the effectiveness of the digital strategy across the organisation.

For example, if a charity starts to use online video services significantly then the bandwidth requirements of both the local area network (LAN) and broadband service will increase and if these haven't been planned for then there the services the charity wants to use just won't function effectively.

Similarly, if field staff are to be more digitally enabled, then they will need to have appropriate hardware – be that laptops, tablets or smart phones. Existing equipment might not be capable of supporting the processing required.

In order to form a single view of a supporter/beneficiary and deliver personalised services and communications, the appropriate technology is needed. These technologies are about improving the performance, speed, user experience (both of staff and beneficiaries) and about generating better reporting leading to improved understanding of how current programmes and products are performing. Most of the established technology in non-profits is not able to support all this, so new technology is needed.

Security needs to be considered here too. With sufficient investment being made in tools which will help protect the charity (email scanning, virus scanning etc.) and aging infrastructure software replaced before it goes out of life and ceases to receive security patches. Particularly consider here old versions of Windows, browser software and website plug-ins. Security of technology platforms is the bread and butter of teams looking after internal systems. Many organisations also look at the next level where breaches can happen, for example, data collection/management both online and internally.



Step 6: Technology, data and risk

However, introducing new systems and technology doesn't have to mean throwing out everything old and starting anew. Often new technology systems can be added to the old, then new business processes created, and staff trained.

Business process change will ultimately lead to more efficient ways of working. For example, when a team's time is released from manually uploading data into supporter/client database, they can spend more time with clients/supporters. Or an example of a charity which has reduced their staff time on creating emails by 66% by automating the majority of the event communications emails.



Business process change will ultimately lead to more efficient ways of working; one charity reduced staff effort on email by 66% by automating event communications

Questions to reflect on:

- › Are technology systems enabling a single supporter view, which include online activity beyond individual giving? For example, how easy is to know how many of your email subscribers have done at least one other thing with your organisation (donated, taken action, downloaded a PDF, registered for an event, etc.)?
- › Do you think that time needed to implement an online engagement project - from idea, creative execution to data flows and reporting - could be much shorter? If yes, are there technology-related solutions that could resolve this?

Step 6: Technology, data and risk



Data management

Data management is your 'way in' to understand behaviour of your audiences (supporters, beneficiaries, politicians) and to make both business and social impact decisions.

Understanding how audiences interact with an organisation, through which channels and how often (single customer view or 360 supporter/customer view) will help an organisation design an appropriate journey for that individual thus encouraging longer term engagement.

Collection and analysis of data - internal or from external sources – informs research.

Data on how different digital products are performing is essential for future planning. It can show how well the organisation is delivering its programme and/or services and can inform day-to-day decisions.

However, to remain compliant with GDPR charities should only collect the data that they need and can use.

Ability to learn and plan with data is dependent on:

- › Data quality - ensuring that data is clean, collected and stored in a compliant way
- › Technology which enables the bringing together of data from many different sources in order to create reports which help paint a picture of how audiences are engaging or how an organisation is performing.

Questions to reflect on

- › How easy is it for you to email everyone who has opened an email but didn't take action/ donate within one day of that email being sent? If the answer is 'not easy' or 'we need more time', this indicates that your data storage and processes need to be adjusted for real-time digital communications. Analyse what the obstacles are to do this way of working.
- › Is the implementation of GDPR compliance in your organisation enabling you to communicate to your audiences better or is it stopping you do the basics (e.g. sending emails to subscribers, Facebook advertising)?
- › How easy is it to create basic user reports reasonably quickly (e.g. how many donations came from a specific email, how many donors are also email subscribers, how many donors also took an action)?



Step 6: Technology, data and risk



Risk and ethics

It is critical that charities fully consider the risk and ethical implications of their digital strategy. We've already touched on security in a general sense, but it's worth taking this further by considering the different types of data you hold or might hold in future, the sensitivity of that data, and how you will secure it appropriately. Cyber security should be of particular concern and the following resources offer useful background and insight:

- [Top 10 cyber security resources for charities](#)
- [NCSC Introduction to Identity and Access Management](#)
- [Webinar: Is your charity doing enough to prevent cyber-attacks?](#)
- [Cyber-security FAQs – the risks of malware](#)

You should also consider other types of risk such as the implications for a core service if its underlying applications or infrastructure fail (both existing applications and new investments) so appropriate due diligence on suppliers is essential, and contract terms and conditions should be structured to provide appropriate protection and mitigation.

Each organisation will have its risk management and compliance processes which will affect how technology is commissioned and used. As important as these processes are, they should not paralyse organisations or prohibit practices established elsewhere in the market such as online and social media advertising, emails, personalisation, etc.

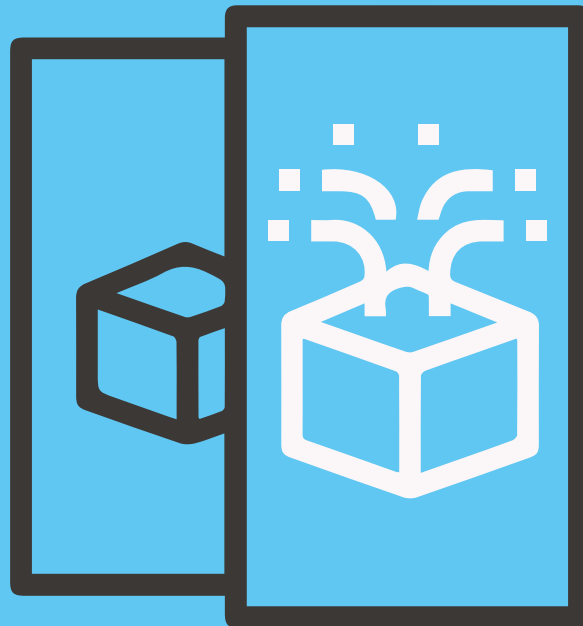
In designing new services charities need to consider any ethical aspects, e.g. safeguarding of vulnerable groups, and unintended consequences which need to be considered, watched for and addressed. This is particularly true of new technologies, where patterns of usage are less clear and their consequences less known. E.g. data breaches on new platforms, bias in algorithms, and lack of ethical design or user advocacy.

Ethical considerations also require charities to ensure that digital solutions be fully accessible, to ensure that their services can be accessed by a wide range of users and no individual is barred from seeking employment with the organisation.

Questions to reflect on:

- › Do you explicitly identify risks in each digital project and plan to contain and mitigate them?
- › Are your digital solutions fully accessible?
- › Do you consider the potential unintended consequences of each digital project, particularly with vulnerable groups?





Step



Project budgeting and phasing

Step 7: Project budgeting and phasing



In this section we bring together all of the outputs from the previous steps to produce costed projects which can then be evaluated and structured into a phased plan. We also look at how you set expectations with your stakeholders.

Budget

Investment in new technology is needed to enable the organisation to be more successful and efficient and the cost of this needs to be planned for including both applications and infrastructure costs. But these aren't going to be the only costs.

Sometimes the investment in planning needs to be greater than the investment in deploying the technology itself. For example, the implementation of a Customer Relationship Management database requires in-depth analysis of data flows, how data is processed and manipulated, where data is stored, how data is used by different parts of the organisation and for what purposes. Only once there is clarity on what is currently going on and where the organisation aims to get to can technical implementation be properly planned.

Training employees in how to use new digital solutions and other change management costs also need to be planned for (i.e. recruitment of new specialised skills).

The assumption is that the bigger the budget an organisation has, more they can achieve. This is of course true but it's not the only factor. How budget is being spent on digital products - staffing, technology, marketing etc., is also down to how a (limited) budget is being prioritised.

Some examples of investment with only a partial benefit:

- › An organisation more comfortable to spend money on a £20k a year PR contract, where they will most likely get short-term publicity, than on a new website which is effectively a shop window of the organisation.
- › An organisation with limited staff budget recruits a new staff member with no digital skills, e.g. a fundraiser who only has experience with direct mail; a service support person who can't use online meeting tools; a finance person who has no experience of online payment platforms.

Questions to reflect on:

- › Does your organisation have a digital budget which covers more than licences and ongoing fees?
- › Does the case have to be made every time budget for improvements to digital platforms are needed? Is there an understanding that the investment in technology is ongoing?
- › Do other teams in your organisation hold budgets for digital work? If so, do they consult your digital lead in how to spend this budget?



Step 7: Project budgeting and phasing



Project Phasing

The strategy process often results in lots of competing priorities being identified and so working out which to focus on first and the phasing of these different priorities can be difficult.

The best way to do this is to shape each of the development areas as a potential project. Each project can then be assigned an estimated cost and resource (budget) and given a priority. In deciding on priority consider a range of different factors including the impact on beneficiaries (better services, better outcomes), cost savings and income generation (impact on sustainability) and risk and compliance (sustainability). The balance between each of these different factors is likely to vary based on the context of the charity – so a well-funded charity with high reserves might rank impact on beneficiaries the highest, whilst a charity in deficit with limited reserves might have to prioritise income generation and cost savings. Statutory deadlines (i.e. GDPR and Making Tax Digital in recent years) and software going off support and therefore becoming a security risk (i.e. Windows 7 End of Life) or endangering service delivery should also be considered.

Having completed this analysis, a charity can then move to decide which projects to deliver and when, balancing the project priorities against available budgets and resources. This might be relatively self-evident but if there are still competing projects a matrix such as the one below can help. The ideal will be to focus on delivering first the high impact, low cost and resource projects. However it might be the case that the high impact projects are also high cost and therefore cannot be tackled immediately and that there are mid-impact low-cost projects which can be rapidly implemented. Ultimately a charity might end up with a multi-year plan of different projects which can be deployed.

Sometimes the process described in this book can result in digital strategy recommendations that feel very top level and removed from the day to day. That's why it's important to bring them to life by outlining how small, low-hanging fruit type activities can kick-start the strategy implementation. What sometimes stands in the way of taking this approach is seeking perfection and focusing on the risks instead of the benefits.

This isn't to say that risks should not be considered and managed. But if managing risk means that you can't do something that is an established activity in other similar organisations, then it's your risk management process that needs a closer look, not the recommended activity.

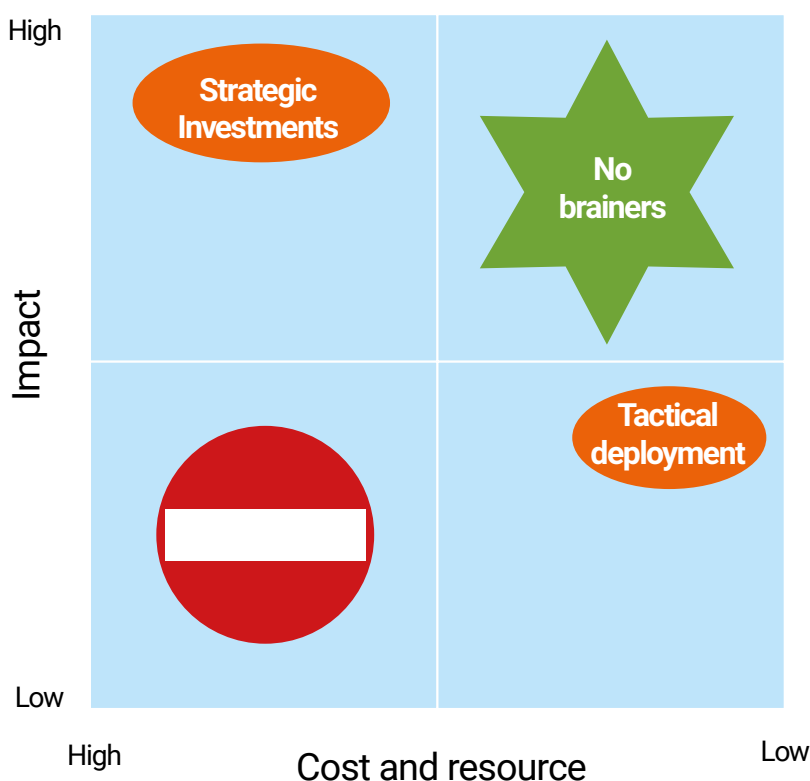


If managing risk means you can't do something that is an established activity in similar organisations, then your risk management process needs a closer look



Step 7: Project budgeting and phasing

Project Portfolio Assessment



Formulating a cross-organisational understanding of best practice and how things should be done is crucial. But it's also important to acknowledge that getting there is a journey and the organisation will have to go through a few 'quick & dirty' solutions before they get to the ideal.

Automation is a perfect example of this. Best practice tells us that the moving of data between systems should be automated with little manual intervention, therefore enabling real-time use of data and minimising risk of human error and data breach. But to get to this ideal scenario an organisation may need to redesign its supporter database, bring in a few new platforms, software and hardware solutions and change business processes.

This, of course, takes time and most organisations will inevitably have to do this in parallel with a number of different projects. So, accepting that project phases may not be best practice but are 'good enough' is an important element of planning digital strategy implementation.

The digital strategy should be constantly refreshed in the light of experience with a major review and sign-off annually and in view of this do not be afraid to just get stuck in and get the ball rolling. If this is done in the context of supporting the organisation's strategic priorities it is unlikely to move the charity in the wrong direction and the learning gained can then be used to strengthen the future digital strategy.

Step 7: Project budgeting and phasing

Setting recommendations

Throughout the process of gathering all the insight as set out in this book (including analysis of your own data sources, business process mapping, the digital maturity assessment, the interviews with stakeholders and the information found in external reports) you will start to see recommendations emerging.

Ideally, you will have a few stakeholder workshops in progress, which will give you the opportunity to share insights and test out related recommendations. As you float recommendations in response to some of the insights, you will also be able to gauge response.

Listen carefully to what colleagues are saying and answer all of their questions patiently. Consider involving other colleagues in the conversation if this will help move doubters on.

Escalate issues upwards if that level of an organisation's hierarchy is strongly on board with the project. However, be aware that sometimes the way to get their buy-in is to get their teams excited and enthused about what you're doing.

The point is, once your recommendations are committed to paper, they should not come as a surprise to your stakeholders. Ideally, they have already heard about it and had the opportunity to ask questions.

You should divide your recommendations into three main building blocks of a digital strategy as set out in this book: planning activities, people and change, and infrastructure.

While some recommendations will go across these areas, it may be useful to separate them in the three categories so you can present your whole strategy in one page. The example below also demonstrates how a digital strategy can be implemented over time.

You should be careful not to overload the first year of the plan, but at the same time do not be concerned if year 3 of the plan has less detail. Reviews in subsequent years are likely to identify new short and mid-term priorities which can be added to the plan it evolves.



Once your recommendations are committed to paper they should not come as a surprise to your stakeholders

Step 7: Project budgeting and phasing

Digital Strategy Implementation Planning

	Year 1	Year 2	Year 3
Planning activities	<ul style="list-style-type: none"> » Improved digital reporting » Audience survey » User experience work » Audience insight development » Audience journey planning » Pilot chat based help system 	<ul style="list-style-type: none"> » Regular digital KPI reporting » Better content performance analysis » Productionise chat based help system (subject to pilot) 	<ul style="list-style-type: none"> » Implement new care management system
People & change	<ul style="list-style-type: none"> » Recruit / appoint head of data and governance and 2 digital project managers » Digital training programme design and roll-out » Introduce iterative test and learn approach 	<ul style="list-style-type: none"> » Digital competencies roll-out v HR » Develop and implement coaching skills programme » Increase digital team by a further 5 heads 	<ul style="list-style-type: none"> » Devolve digital to teams across the organisation » Combine senior digital and technology in single Digital Director role
Technology, data and risk	<ul style="list-style-type: none"> » Update staff desktops / laptops to be windows 10 capable » Implement email solution » Provide remote access for field based staff » Security & privacy audit » Map technology for data flows for journey implementation 	<ul style="list-style-type: none"> » Implement new accounting system » Fund and purchase appropriate video recording device(s) » Website refresh » Improved (Google) analytics » Identify new donor database / CRM system vendor 	<ul style="list-style-type: none"> » Implement new donor database / CRM system » Increase bandwidth of broadband solution

Digital strategy design: a step by step guide for charities



About this book

About this book



This book was created by Jonathan Chevallier and Brani Milosevic in collaboration with Charity Digital.

About Jonathan Chevallier

Jonathan is CEO of Charity Digital. His key expertise is in strategy and digital transformation. His early career includes several years in senior technology, strategy and marketing roles before becoming MD of consultancy, WCI Healthcare. Prior to joining Charity Digital he was CEO of medical technology start-up Oxehhealth, leading it through the critical early years to commercial traction. He has been an advisor for social enterprises including Clarity, a soap and toiletries business which provides meaningful employment for people with disabilities and young people's charity Eikon.

About Brani Milosevic

Brani is an independent digital consultant and strategist for the UK non-profit sector. She forged her expertise in digital strategy development and implementation at some of UK's biggest charities including Save the Children and World Animal Protection. In 2014 she established Digital Leadership Ltd, a digital strategy implementation support organisation for charities, and has since been helping individuals, teams and senior management lead digital transformation in their organisations. She also founded the Digital Leadership Forum (DLF). She's an NCVO trainer, CharityComms mentor, qualified executive coach, facilitator and established speaker.

About Charity Digital

Charity Digital (registered as Charity Digital Trust – charity number 1133179) was established in 2001 to help other charities accelerate their missions using digital technology. Before its rebrand in July 2019, the organisation was called Tech Trust.

We partner with leading technology providers to deliver the UK's only software donation platform, Charity Digital Exchange. Our services improve digital awareness and access, connect charities to the digital expertise and talent they need, and raise the bar for digital skills and understanding for non-profit organisations of all kinds

To date, we've helped over 400,000 charity professionals learn about digital transformation through our media platform Charity Digital News, and enabled a further 36,000 charities to save almost £250 million on technology investments. Since 2002, our payment processing and fundraising services have provided income of over £300M for our charity customers, and an average of four million emails per month are sent through our bespoke charity email service.

Learn more about us at www.charitydigital.org.uk