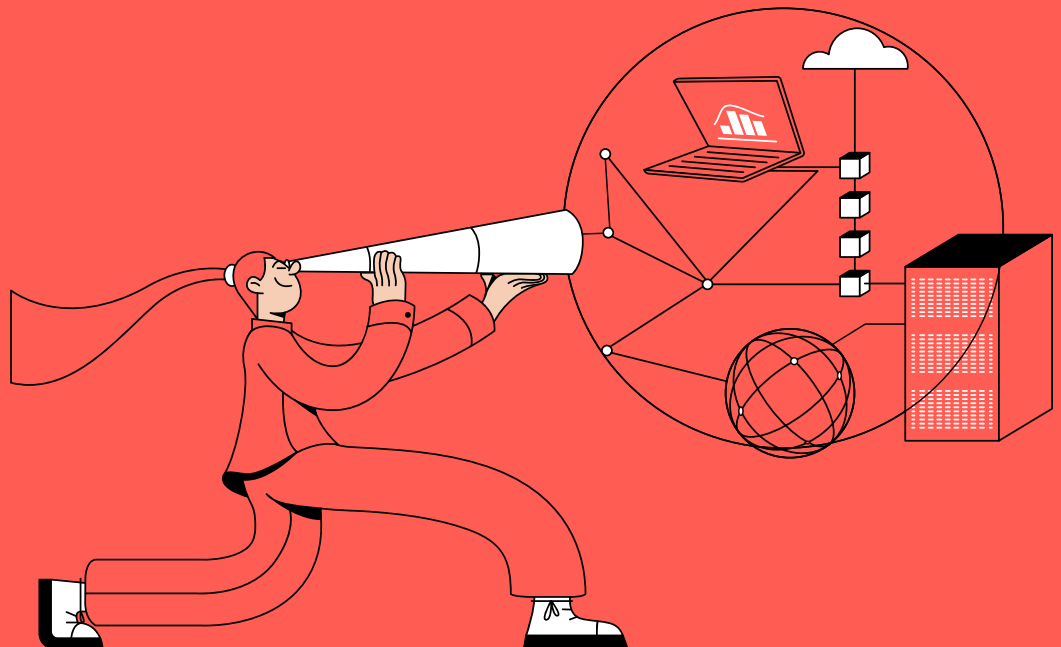


A nonprofit's guide to digital transformation projects.



Introduction

You know there's a problem, and you're convinced that tech will save the day. But with all these systems, buzzwords and people that talk in tongues, knowing where to start is hard.

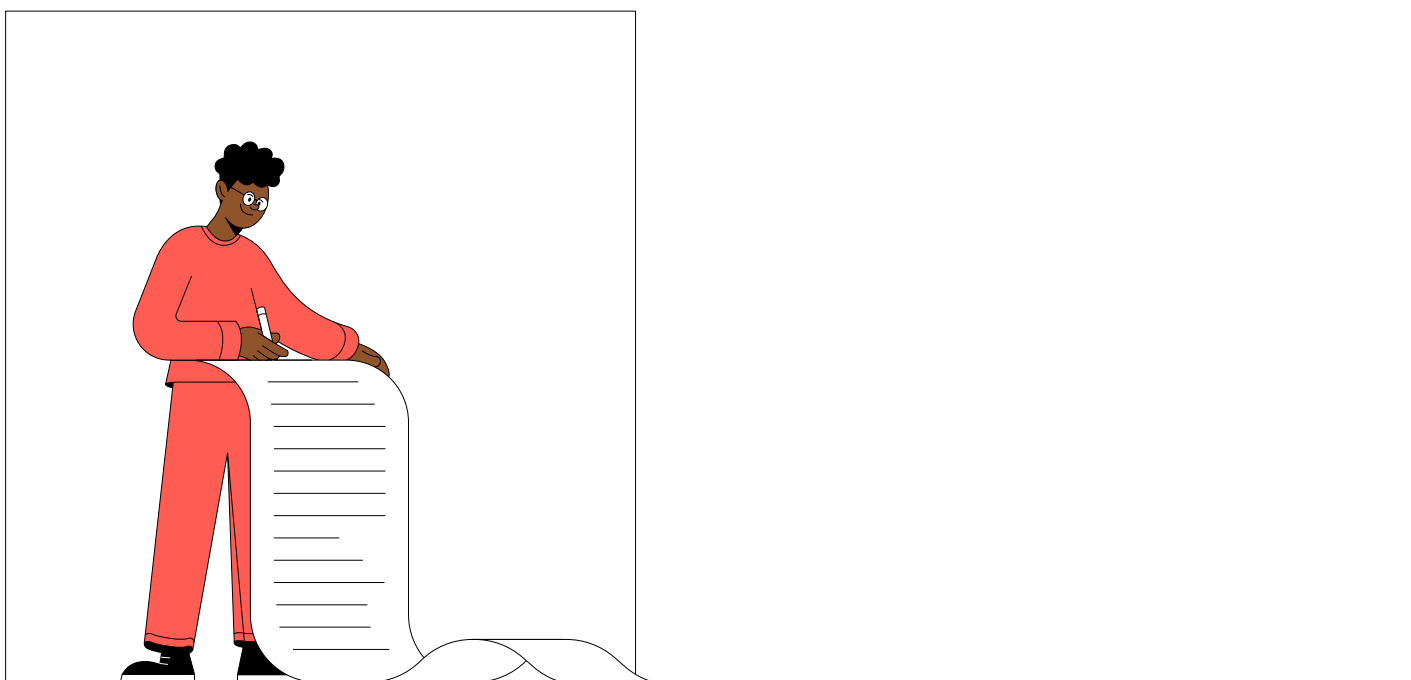
It can feel challenging and overwhelming. Leaving you questioning why there isn't a magic robot (like this one from Disney) to make digital transformation easier by doing all the work for you.

Don't despair. While we can't provide you with a rollerblading robot, we can offer you jargon-free guidance on navigating digital projects. With our help, make your digital projects smooth sailing and move forward with confidence.



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8 considerations for a successful digital transformation project (that won't make you question your sanity)



Should you work with a digital transformation agency?

Yes.

Sorry, we couldn't resist. Here's a more diplomatic answer.

Let's say your website has far too many grammatical errors, making it seem unprofessional. You might not need an agency to simply update your content (maybe chatGPT could help?). But if your website is confusing and not user-friendly, an agency might be helpful. They'll pinpoint areas for improvement, suggest new features or functionalities and provide a fresh perspective.

Some of this you might be able to do yourself. But a bit of guidance will keep you on your toes. If you're overhauling any of your systems, ask yourself:

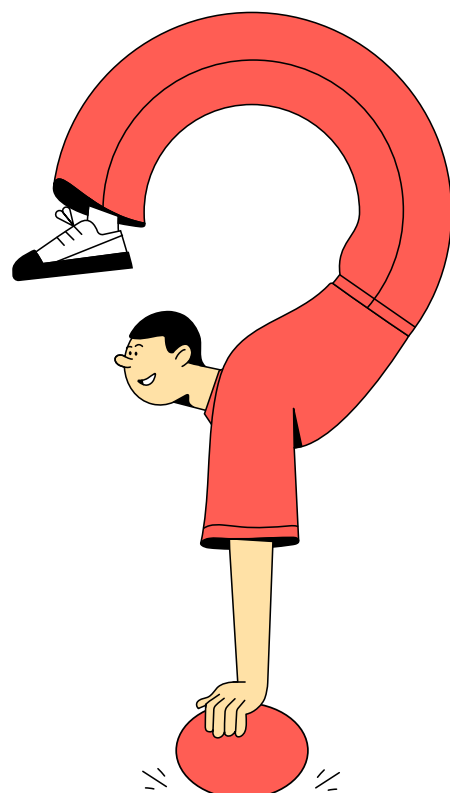
- How much time do you have to dedicate to research?
- What's the most complicated spreadsheet formula you can come up with without googling?
- Do you really want to select a software you have to live with for years and trawl through the documentation to figure out if its suitable?

If the answers to these questions are "none at all because I have a life and problems", "A1+B1" and "nope", then you should probably look for a technology partner.

This level of work requires a deep understanding of not only the technology itself but most importantly the processes and workflows that underpin your organisation. It's cases like these where an agency's expertise is vital.

So the agency shouldn't just go off and work in isolation - think about it as a partnership. You provide the input, they crunch the numbers and guide you into a safe haven.

An agency can also offer a new outlook, providing a fresh strategic overview of your current systems and processes. And they can spot room for improvement that might have slipped under the radar. They can lighten the load for your in-house team, cutting stress and making sure the project's done right and on schedule.



What do you need to look for in an agency?

You don't necessarily need a non-profit agency expert. But it helps. A team with industry knowledge and board persuasion skills will facilitate a smooth project. So will a team that's happy to be educated as you take the time to explain how you work.

Also, partner with an agency who shares your values and philosophies. You probably don't want to sing Kumbaya at the start of every meeting - but having some common goal posts makes these meetings much more enjoyable. It creates the foundation for a strong relationship and solid communication — the most critical measure of helpfulness for your team. If the first introduction call has more than three head-scratching acronyms and leaves more questions than answers, it might be time to say goodbye.

Also, ask the agency what happens at the end of a project. Will they stick around to provide aftercare and maintenance? Do they offer tech support for those late-night “Oh no, everything's on fire!” moments?

Seriously, though. Your tech will constantly evolve and your systems will require ongoing updates and maintenance to continue functioning properly. Your agency should be there to support you with these needs.

Top tip:

When considering a younger agency, review the performance and experience of its founders and general network.

Sure, they might be packed with awesome talent. But if they're short on business smarts and financial stability, your project could be on shaky ground.



How do you brief an agency?

You could send a short paragraph about what you want from the project.

Or you could invest in creating a detailed scope and cost plan — a final, shiny brief containing your objectives and requirements, generating a clear roadmap for the agency to follow. While it may require more resources up front, it can ultimately save you time and money in the long run. Streamlining the project and helping you avoid costly delays or misunderstandings.

There's always three things that depend on each other and that need to be defined: Cost, time and scope.

Coming back to your objectives, make sure they're clearly defined. So you get the results you need and avoid any unexpected surprises, such as ending up with a website that's completely cat-themed.

Involve the right people early in the process. Lay down clear expectations and make sure that everyone is aligned around the project's goals and objectives. Your agency should also have a diverse range of team members in those initial meetings, not just the sales people. So your project is crafted with the perfect blend of viewpoints and know-how. That ensures that those executing specific parts of the projects understand your goals from the get-go.

Top tip:

Avoid underestimating the scope of the project. It's better to put it all out to start with and then reduce the scope if and when necessary rather than finding missing bits along the way.

This could result in unforeseen project delays and budgetary pressure. If it's not written down, it probably doesn't exist. This helps to avoid the 'I thought that would be included' disappointment.

How long should a digital transformation project take?

Yes, we're going to say it: how long is a piece of string?

To keep your project from going off the rails time-wise, you've got to set some goal posts. Are there any deadlines to hit (e.g. real world events to work towards, budgets to be finalised or board meetings?). Budget and scope dictates the timeframe too, so make sure the agency understands your criteria.

Even if it's a seemingly well defined job, like building a mobile app, the project length can vary from a few weeks to a few months. Especially if your new app is complex and requires advanced features and integration with other systems. The development timeline could easily span several months before it's ready for launch.

Note:

If time is of the essence, there might be scope to roll out a build in several phases, with only core features to start with to cut down delivery times.

What about more extensive projects, like a complete transformation of your digital systems and processes? They could take several years to complete. The work might never truly end, but that's not a bad thing. But don't worry, no need to get overwhelmed before you even start. Remember that the process of digital transformation is supposed to be a continuous journey that transforms the way your organisation operates in all areas.

Top tip:

If a project feels too big and overwhelming, break it down into smaller parts. Then your agency can focus on one area of the project at a time and set smaller goals to work towards.

You become a conductor, directing your team and agency towards each small goal until you've created a masterpiece.



How much should it cost?

This is a bit like asking “how much does a house cost”. You need to consider the cost of the land, determine the size of the house, and factor in the interior decoration. Based on those elements, you can set a budget. Some options might be out of reach due to budget constraints.

There are experts who can help you figure out options and costs before you start decorating. If you jump right in without a plan, it's like going to Ikea and buying a bunch of stuff you don't need. You're blowing your money by winging it.

That's why, when it comes to digital projects, investing in a short discovery phase can save money in the long run. Your agency can help you get a clear idea of what you need, what you don't need and what will work best for your unique situation. Like having a personal shopper for your digital needs.

With that said, projects can be broadly categorised into three levels:

1. Off-the-shelf

Implementation of pre-built software or technology, such as a customer relationship management (CRM) system or an enterprise resource planning (ERP) system, that are readily available in the market. This service could be carried out quickly and at a low cost. Or it could take 15 consultants a year to get you set up. That depends on whether the initial market research and suitability analysis has been done properly. And if the system has clear documentation and support. If you're buying a system that fits like a glove to your foot, you could be in trouble.

2. Off-the-shelf-ish customised

You're integrating multiple off-the-shelf systems into a tailored workflow that fits your needs like a custom-made glove. It saves you the hustle of setting up your own 100 person in-house software development team. But it also comes with the risk of lots of moving parts and enough licence fees and upkeep costs to make your head spin. That's where an agency is valuable - they can be your swan on the surface, looking all calm and collected, while paddling like crazy behind the scenes to keep everything running smoothly.

3. Fully bespoke-ish

Time to roll up your sleeves and get serious about your digital game. A fully bespoke solution often entails a big investment of time and resources, making it probably the most expensive option. But it could be the key to achieving all your goals. Saying that, there are different levels of “custom” these days. You can go the traditional route and build everything from scratch, or you can opt for pre-built blocks that fit together. It's kind of like buying a Lego set and using the pieces to create a unique design that's all your own.

Note:

An agency should help you define the scope of the project, spot the must-haves, and scout out some game-changing possibilities.

To be clear, the agency's job isn't to tell you what to do (although they might do this anyway). It's to help you establish what's possible based on your objectives and investment budget.

How do you make transitions easier for your people?

A digital agency should make sure that your project is executed with a healthy dose of accessibility and usability. So your team can easily jump on board. But let's be real, getting everyone to embrace the change is the real challenge here.

Your team members will find changes easier to embrace if they're comfortable with the tech. They might need to build their digital skills and capabilities to get to this point. Consider how your people might learn in different ways. For some, hands-on training might be a more effective teacher than lectures and videos.

You could also nominate someone who can act as the team's primary contact for any inquiries or advice. You know what they say - when the going gets tough, the tough nominate someone else to deal with it! But in all seriousness, having a primary contact for inquiries and advice can be a real lifesaver when it comes to change. They can also assess any problems that could highlight opportunities for further training.

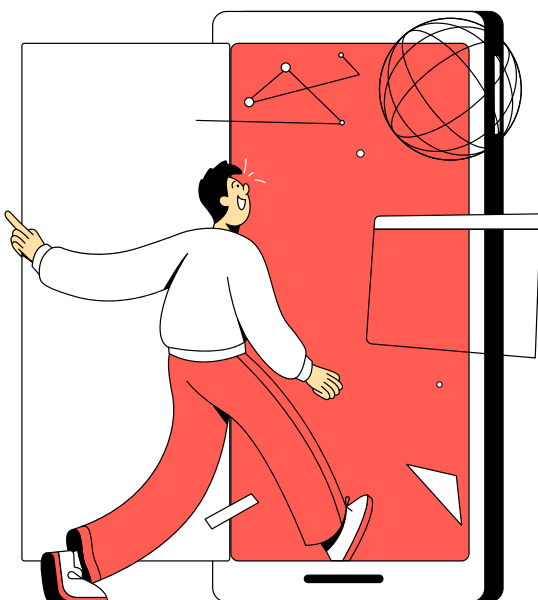
Getting the most out of modernisation also often requires a cultural shift. Your people's mindset, behaviours and ways of working will likely need to change according to your overall objectives. But your people will only embrace these changes if it comes from the top. You need to model the desired behaviours, such as promoting teamwork, experimentation and ongoing learning. A digital partner can step in and offer stellar advice throughout this process.

How do you end a project?

In reality, the work never truly ends. And not because the people who manage digital projects are secretly masochists. It's because projects require continuous attention and adaptation to stay effective in a rapidly evolving technological landscape. Sure, it may feel at times a bit like Sisyphus pushing the boulder up the hill, but with each iteration, you're making progress and gaining momentum.

Saying that, it's useful to have distinct milestones and a project closing meeting. We all love a party - so coming together and celebrating a big milestone, like the successful rollout of a new customer relationships management (CRM) system, is good for everyone's morale.

Closing meetings also give you an opportunity to reflect on "learning opportunities" - also known as the times when things went sideways faster than a downhill skier on an icy slope. But hey, we don't make mistakes, we just have happy accidents, right?



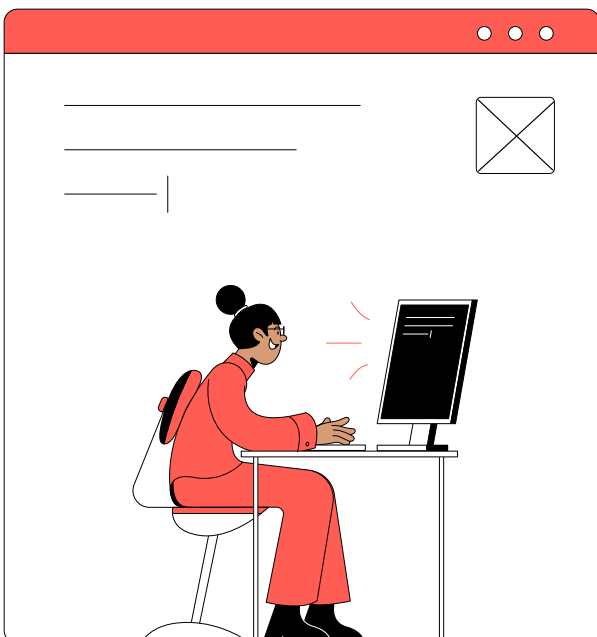
How do you measure success?

Let's say the project is now complete and it's time to move onto maintenance mode. Compare your original assumptions with what you've got in front of you. If all matches up - happy days! Sometimes assumptions change during a project, so checking in with your success statement regularly prevents surprises at the end.

If your vision of success has been realised, you'll know the work was worthwhile. If it hasn't - don't panic. Rome wasn't built in a day. Just take some time to sit down with your agency and have an honest conversation about what worked, what didn't and how you can both move forward.

When you team up with a partner for a digital project, make sure to set some goals - but let's keep them realistic. While "world domination" might be a bit much, a goal like "improving our impact on the people we serve" is definitely doable.

As well as your success statement, you should have also defined measurable outcomes. Those that are relevant to your organisation's goals and can be objectively assessed and compared over time. Such as productivity levels, revenue generated, user satisfaction and lowered caffeine intake. Measuring these outcomes will make success more tangible so make sure you have a way of defining these numbers.



Get rich then make a difference

Gotcha!

We know you're all about making a positive impact. Money helps though, right? And, the more efficient, effective and innovative you get, the easier it will be to raise money for all the great things you're doing.

The agency you work with should be a part of your success. Their goal isn't just getting paid and disappearing in the distance. After all, if they can demonstrate your success, it's their ultimate marketing tool. So helping you embrace new digital technologies and processes is totally in their interest. Or at least, it should be. Use what you've learnt in this guide to choose an agency fully invested in your progress.

So by now, you're convinced we're basically geniuses. But we get it - you need more info to decide if we're the right digital agency partner for you. Go ahead and **fact-check us**.

Already sold? Well then, you're in good hands. Let's get started on your digital project and create something amazing together. **Shoot us a message**.



We're on your team, talking your talk and making the tech world a bit more understandable. The goal is simple - ensure technology works for you, simplifies your life, and leaves no room for confusion.

Ready to get started?

Say hello on hello@wearetelescopic.co.uk
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