



Digital Strategies and Cake

30 March 2017



@AdaptaforNFP

Adapta Consulting

We are:

- A specialist information systems consultancy
- We only work with membership organisations, charities, associations, trusts and others in the NfP sector
- We are completely supplier-independent
- Our consultants have held senior positions in a broad range of different organisations
- Our advice and guidance is based on practical experience gained over many years.

Programme

14.00	Arrival and welcome Libby Hare – Adapta Consulting
14:15	What makes an effective digital strategy? Julia Gorton - Adapta Consulting What makes for an effective digital strategy and what should be addressed to ensure it supports your organisation's objectives.
15.05	Case study James Drever, Head of Digital Services, Field Studies Council
15:35	Discussion and feedback A round table discussion and feedback to draw our further best practice learning.
16.45 - 17.00	Review and close Libby Hare – Adapta Consulting

Introductions



What makes an effective digital strategy?

Julia Gorton

Consultant, Adapta Consulting



“There is a continuum of usage of digital technologies by the charity sector, from digitally mature charities through to the digitally innovative.”

Helen Milner, from the recent House of Lords Select Committee report
‘Stronger charities for a stronger society’



What makes for an effective digital strategy and what should be addressed to ensure it supports your organisation's objectives?

What is digital?

What is digital?



- Online
- Virtual
- Up to date
- Fast
- Technology enabled
- Offline
- Actual/physical
- Out of date
- Slow
- Manual

What is digital?

The wider web context

The tools or platforms used internally

The things you do with those tools

Marketing and fundraising through digital channels

What is digital?

The wider web context

JustGiving™

Eventbrite

facebook



Linked in



Woo COMMERCE



Instagram

What is digital?

The tools or platforms used internally



What is digital?

The things you do with those tools

- Moving data around
- Making data selections
- Designing and writing for online use
- Creating imagery and video
- Writing website code
- Etc.

What is digital?

Marketing & fundraising through digital channels

- Email marketing
- Search engine marketing
- Display advertising
- Social marketing

What is digital?

	Marketing and comms	Fundraising	Advocacy/ activism	Membership	Events
Digital technology	Underpinning operations – CRM, CMS, email broadcast, web presence				

What is digital?

	Print-based	Digital
Marketing and comms	Ads, DM packs, press and magazines, billboards	Email, social, search, display

Objectives and tactics

Objectives and tactics

- Raise money
- Acquire new supporters
- Retain existing supporters

People, processes, technology

But mostly people

The external context

... putting the user at the centre of the digital experience

The external context

- Online
- Virtual
- Up to date
- Fast
- Technology enabled
- Offline
- Actual/physical
- Out of date
- Slow
- Manual

So what does that mean internally?

A changing culture

- Communicate
- Collaborate
- Integrate
- Participate
- Evaluate
- Assimilate
- Educate

A changing culture

Communicate

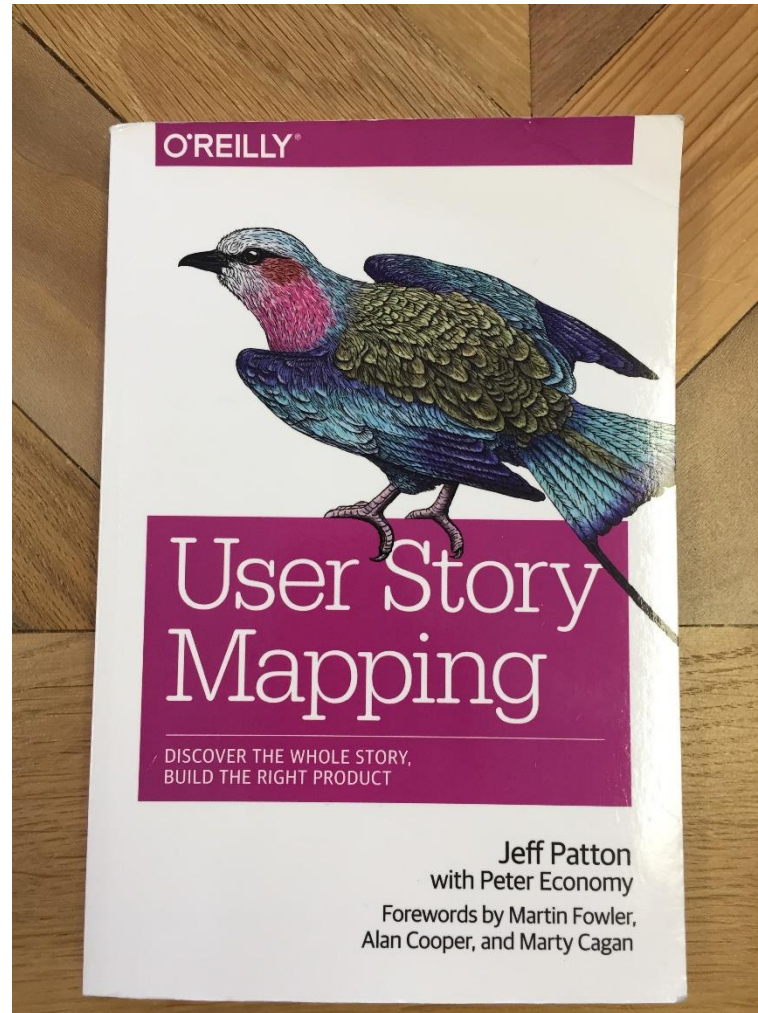
A changing culture

Collaborate

A changing culture

USER: NEW OR RENEWING MEMBER												
USER ACTIVITIES (backbone)	Respond to marketing	Arrive on site	Fill in membership form								See purchase confirmation	
USER TASKS (walking skeleton)	See become a member CTA or renew your membership	Find out about membership offerings	Frequency and cost	Gift Aid choice	Contact details	DP preferences and other options	Payment option	Payment details	Confirmation on-screen	Confirmation via email	Welcome email	
USER STORIES	Receive email	Individual friend (one adult, one family guest)	One-off (card)	with GA logo	Joint - 2 named adults, same address, same GA requirement	Email and other comms DPs	Direct debit - 75% of online donation	Bank details and verification	Relevant thank you messaging	Fulfilment (via CRM)	separate email?	
	See social post	Joint friend (two adults from the same family, one or two family guests)	Recurring (direct debit £10 less)		Children's names not needed	How did you hear?	Credit/debit card - 25% of online donations	Direct debit guarantee content	Direct debit guarantee	Portal to CRM CRM to fulfillment and ticketing		
	Click through on paid ad	Individual family friend (one adult, up to 4 children (4-16) one family guest)	Prices vary according to choice		Address lookup (PCA)	Motivation for joining	PayPal	Billing address (pre-populate from previous step)	Failed payment handling	Handle enquiries (via CRM) Where is my card?		
	See link on DM offline material	Joint family friend (one or two named adults; up to 4 children (4-16), one or two family guests)	discounts or coupon codes?		existing membership number if applicable		Apple Pay (note no contact details required)	Card details	Gift Aid messaging (thank you, or prompt to sign up)			
	Include help box/number to call	Separate membership type landers			set up username and password for new members?		through Braintree	CRM integration - record created, workflow activated	Content explaining benefits/what you can do now i.e. before receiving card			
	potential to pass marketing coding through the process	Gift membership (tickets.kew.org)			do we need the ability to store different addresses e.g. billing and personal (if they're different)?		if recurring option chosen earlier, payment option is direct debit by default or recurring credit/debit card? Or is that choice made here?		Issue of membership number - allocated by CRM - updated on portal			
		Upsell/promote any particular offerings										
		think about where to land renewing members responding to prompt emails										
		question around asking existing members to login with their username and password to see pre-populated details from previous year										

A changing culture



A changing culture

Integrate

A changing culture

Participate

A changing culture

Evaluate

A changing culture

Assimilate and educate

A changing culture

- Doer
- Thinker
- Learner
- Educator

In summary

- Digital stretches across everything
- Seek alignment by being clear about objectives
- Concentrate on your people and your culture – fundamental to the delivery of digital transformation

“If they [the trustees] are saying, ‘Digital feels like a risk’, they are asking themselves the wrong question. They should be saying, ‘What is our strategy? Where do we want to be in three years’ time? How are we going to get there? Do we want to help more people and how are we going to reach them? Digital ought then, naturally, to become part of that solution.”

Helen Milner, *‘Stronger charities for a stronger society’*

An IT>Digital strategy for Field Studies Council

James Drever, currently Head of Digital Services at FSC
@jdrever

What is the Field Studies Council?

A charity providing “First hand understanding of the natural world”



How does Field Studies Council run?

Medium-sized charity

Relatively de-centralised

Not naturally “digital”



IT Strategy

- **The FSC's first ever IT Strategy:
August – December 2014**

IT Strategy: Why?

- Response to increasing dependence on technology/customer expectations
- Need for sense of overall direction in our use of technology

IT Strategy - Approach

- Identify key technology trends
- Have conversations with FSC teams/external partners
- Have conversations with other charities
- Deliver a recommended programme of work, based on Theory of Change
- Each stage reviewed by a small QA group of trustees

Process: what worked well?

- **Conversations across the charity:** led by need by not technology
- **Conversations outside the charity:** confirmed we were on the right path

Process: what worked well?

- **Trustee QA group:** strong sense of buy-in and help with selling to the wider charity
- **Theory of change:** worked as a process, brought team together
- **Big IT infrastructure/systems projects:** easy to plan

Process: what was challenging?

Time!

Process: what was challenging?

**Big complex questions
and aims that needed
further thought**

Process: what was challenging?

- Marketing: “How can technology help us communicate with different audiences (e.g. customers and supporters), thereby helping to strengthen our brand and profile?”

Process: what was challenging?

- Education: “How does technology help us encourage enquiry and exploration in our learning?”

Process: what was challenging?

How to plan to 2020
when we don't even
know what we need
yet?

Process: what was challenging?

- Is it possible to plan at all with so much internal and external change?

- The tension between an agile/digital mindset and long term planning

The planning “double bind”

- **Conventional IT strategy:** Build a long term plan with forecasted budget, trust the plan
- **Digital strategy:** You can't really plan ahead. Build a team and some key policies and a roadmap of priority areas, trust the team to deliver the roadmap
- “double bind” courtesy of Gregory Bateson. Double binds lead to psychological distress or transcendent insight. Or both.

Our result: A hybrid/compromised strategy?

- **Planning:** mixture of clearly defined and costed projects with reviews and trials for exploratory areas
- **Implementation:** mixture of conventional project management and agile working methods

The After Effects of the Strategy

- A Transition from an IT to Digital Services Team
- Based on conversations from IT strategy – staff wanted a different kind of support, more proactive

Same day consultancy double bind

- Separate IT from digital. IT is a dinosaur. You need a digital guerrilla unit designed to dismantle itself after spreading digital like chaotic wildfire through the charity
- Whatever you do, don't let a guerrilla digital unit spread chaos like wildlife through the charity. Keep IT and digital together so everything still works in two years

Where we have ended up

- We are as Digital Services still a service function, rather than a guerrilla unit
- But we've (partly at least) changed our "IT" culture into something else, more focused on people and processes than technology
- So we roll out Office365 (IT) but also help people proactively use the new tools (Digital)

Implementation: what has worked well?

The plan itself is working remarkably well so far!

Implementation: What has worked well?

- Ongoing relationship with trustees grouping is really important

Implementation: the challenges

- **People**

- we haven't built a true multi-disciplinary digital team
- We still have issues with digital recruitment and resource and internal silos

Implementation: the challenges

- **Culture:**

- A struggle to reach the whole charity: central digital teams can = an arrogant elite
- We don't have senior management/trustees really leading our area of work. We're led more by customer/staff expectation.

A Digital Serenity Prayer

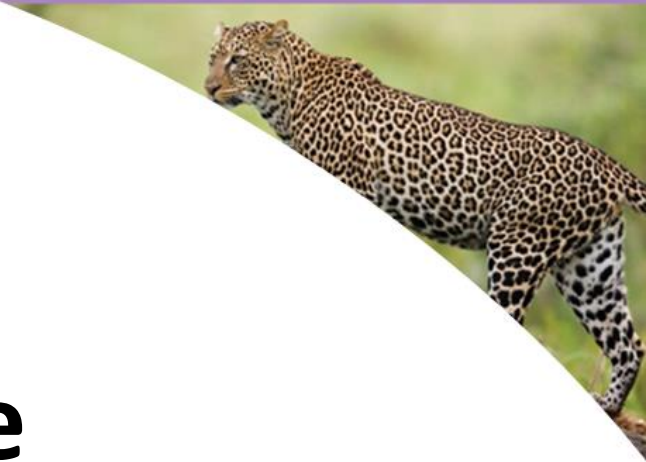
- You can only change what you can change..
- An IT or digital strategy is a necessity, and a terrific challenge..

Thanks for your time. James Drever @jdrever

Discussion and feedback



- What are the drivers for digital in your organisation?
- What are the barriers in getting the most from digital?



Review and close

Presentations will be available to download
from the Adapta website soon

www.adaptaconsulting.co.uk