



Digital strategies and cake

25 November 2020



@AdaptaforNFP

Digital strategies and cake



About Adapta

Adapta Consulting is an independent consultancy working exclusively with organisations in the not-for-profit sector.

We specialise in information systems where our consultants have helped a broad range of charities make the right choice and go on to a successful implementation. We are completely independent, which means that we evaluate all the options for change on their merits and we have no stake in any particular outcome.

What we do

Our services include expert assistance with:

- CRM
- Selecting software
- Strategies for IT and Digital
- Developing a business case
- Managing information security
- Virtual IT Director
- Coaching and mentoring
- Improving your processes
- Managing implementations
- DPA and GDPR compliance

Further reading

Adapta Consulting guides and publications

Adapta Consulting's 'Adaptive Approaches' guides:

<http://www.adaptaconsulting.co.uk/adapta-guides>

Adapta Consulting's online 'Knowledge Resources':

<http://www.adaptaconsulting.co.uk/adapta-knowledge>

Contact us

We would love to have a further chat with you.

Give us a call on: 020 7250 4788

Or drop us an email: hello@adaptaconsulting.co.uk

Our speakers



Keith Collins

Senior Consultant, Adapta Consulting



Dan Lockeretz

Head of Systems, UnLtd



Dave Massey

Head of Strategic Intelligence, Trussell Trust

Programme

- 14:00 **Arrival and welcome**
Welcome to the event, introductions and overview of the agenda for the afternoon
Keith Collins, Adapta
- 14:05 **What makes an effective digital strategy?**
A 50/50, 'Best of Both Worlds' approach to your digital strategy
Keith Collins, Adapta
- 14:20 **Case Studies**
Dan Lockeretz, Head of Systems, UnLtd
Dave Massey, Head of Strategic Intelligence, Trussell Trust
- 15:10 **Virtual Coffee & Cake**
- 15:20 **Virtual roundtable discussion & feedback**
All
- 15:55 **Review & close**
Keith Collins, Adapta

Housekeeping – interruptions are possible



Rules of Engagement!

- 'Share screen' should only be used for speaker presentations.
- Please **remain in mute mode** unless you wish to participate in the Breakout Room discussions.
- Your profile name should be your name and organisation – Hover over your name in Participants and select Rename.
- **If you have a question relating to the speaker presentations, please submit these at any time using the Chat feature.** Questions will be picked up once each presentation has ended.
- If we do not have time to cover questions/all questions, we hope to open a private discussion space following this event.
- We'll be sharing the Adapta slides after the event.
- **If you have a technical question** please use the Chat facility, and select **Paul Stirrat**, who will be able to help.

Breakout sessions will discuss:

1. **What's stopping you from implementing your digital strategy?**
2. **What area of digital technology is most important for your organisation going forward?**

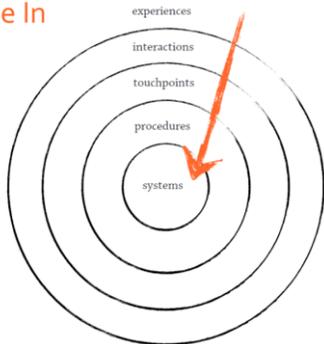
Each group will have a member of the Adapta team who will facilitate the discussion and capture headline notes. Everyone will be returned to the main room for wrapping up.

During breakout sessions: To contribute you should raise your hand using the 'Raise Hands' feature. Unmute once you have been prompted to by the Facilitator.

How to raise your hand: Click on the icon labelled 'Participants'.
Click on your name and select "Raise Hand".
You may have to click the screen to access the menu.

A digital strategy = a myriad of concepts, a bagful of theories, a plethora of options...

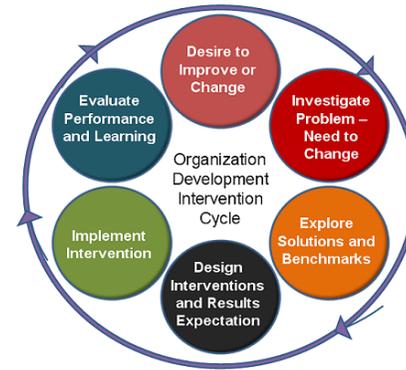
Outside In



From [Janis Hageman](#) (Adaptive Path), Service Design Workshop - UX Week 2013



Organization Development Intervention Cycle



A concept to help bring simplicity



- ✓ Twice the wheatgerm goodness of brown
- ✓ Source of fibre
- ✓ Rich in calcium

| Each slice (38g) | |
|---------------------------|----|
| Energy 369kJ 87kcal | 4% |
| Fat 0.8g | 1% |
| Saturates 0.2g | 1% |
| Sugars 1.5g | 2% |
| Salt 0.32g | 5% |

of an adult's reference intake* Per 100g:
Energy 983kJ / 233kcal



5 'best of both' combinations for your digital strategy

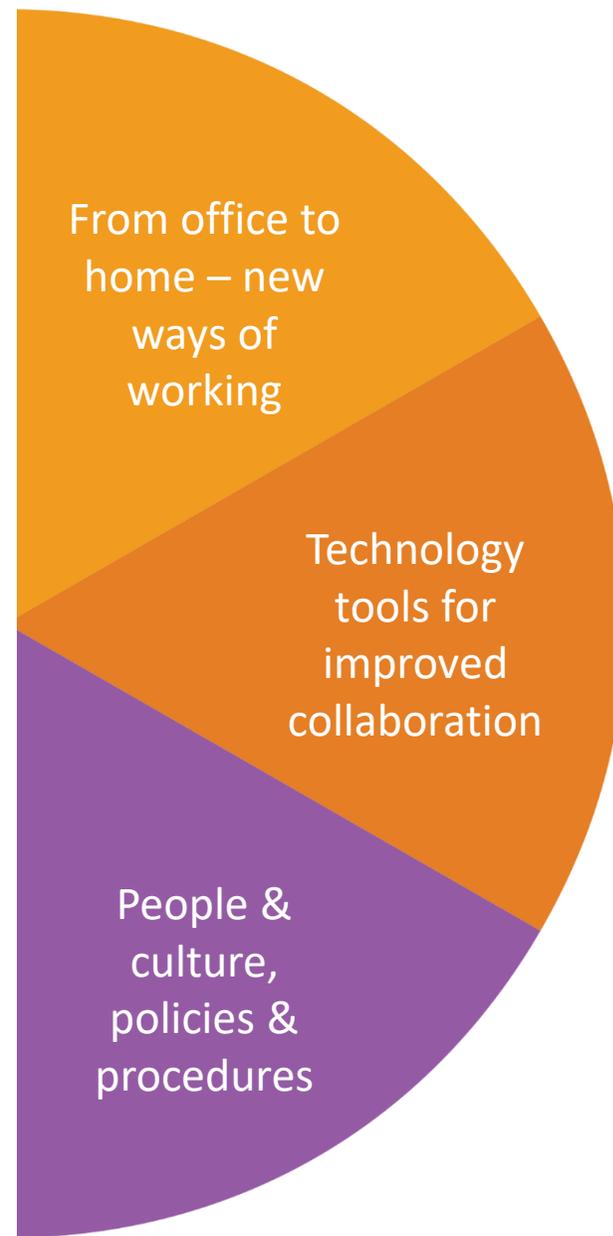
Combination 1:
Internal focus &
External focus



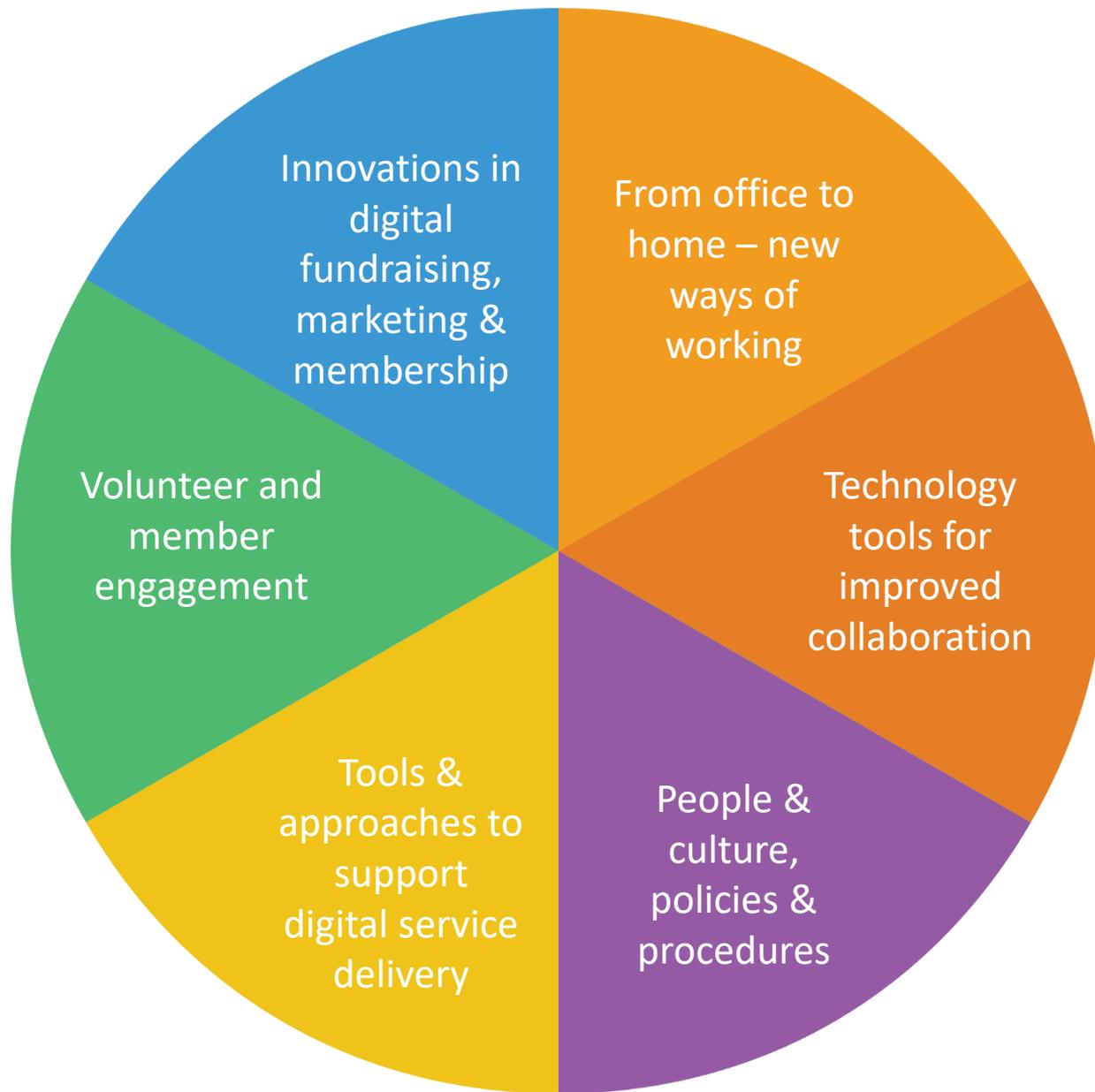
The external focus is often the driver...and more difficult to get right



A digital strategy will always have some need to focus on the 'internal' too



**Is the balance
50/50 with your
digital strategy?**



Combination 2: Business processes & user stories

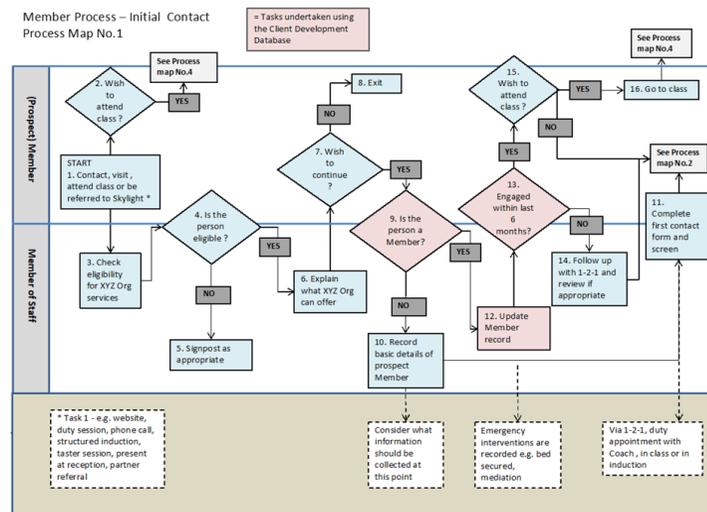
Direct Debits, batching, Gift Aid, membership renewals.

Analogue to Web 1.0

Web 2.0

Inside-out design thinking (UX)

Means your focus is on processes, systems, tools, and products that are designed and implemented based on **internal thinking** and **intuition**. The customer's needs and perspectives do not play a part in this type of thinking; they aren't taken into consideration. You make decisions because you think it's what's best for the business - not for customers. Or you think you know what's best for customers.



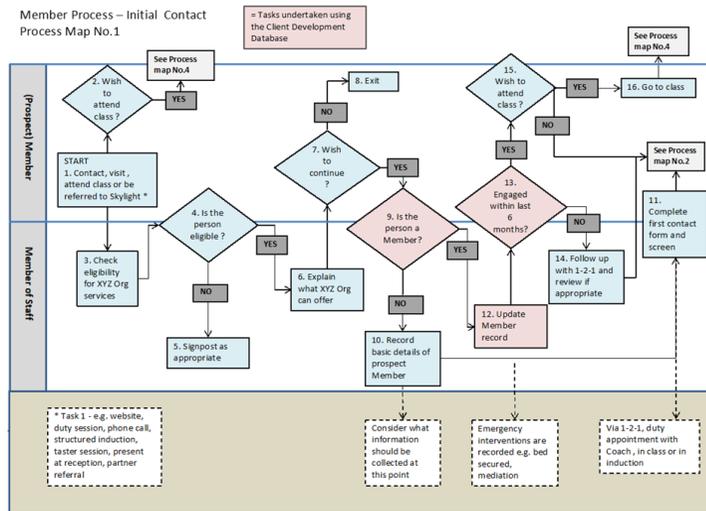
Combination 2: Business processes & user stories

Direct Debits, batching, Gift Aid, membership renewals.

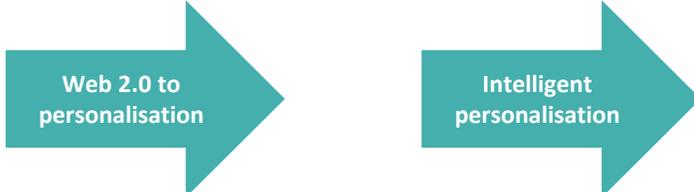


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Ecommerce, digital marketing, social media engagement, remote working.



Outside-in design thinking (CX)

Means that you look at your business from the **customer's perspective** and subsequently design processes, tools, and products and make decisions based on what's best for the customer and what meets the customer's needs. You make decisions because you know it's what's best for your customers. Why? Because you **listen to them**, and you understand them and the jobs they are trying to do



Best-of-both thinking is vital here...some requirements are still best expressed as 'internal business processes' rather than 'user stories'

Business Process



OR

As as [user type]
I want [goal]
So that [value received]

?

Combination 3: The Who: users and supporters



Your team



How can our staff and volunteers work in a more efficient way that enables a more agile, responsive, productive organisation?





CUSTOMER EXPERIENCE

‘the product of an interaction between an organisation and a customer over the duration of their relationship. This interaction is made up of three parts: the **customer journey**, the **brand touchpoints** the customer interacts with, and the **environments** the customer experiences (including digital environment) during their experience. A good customer experience means that the individual's experience during all points of contact matches the individual's expectations.’



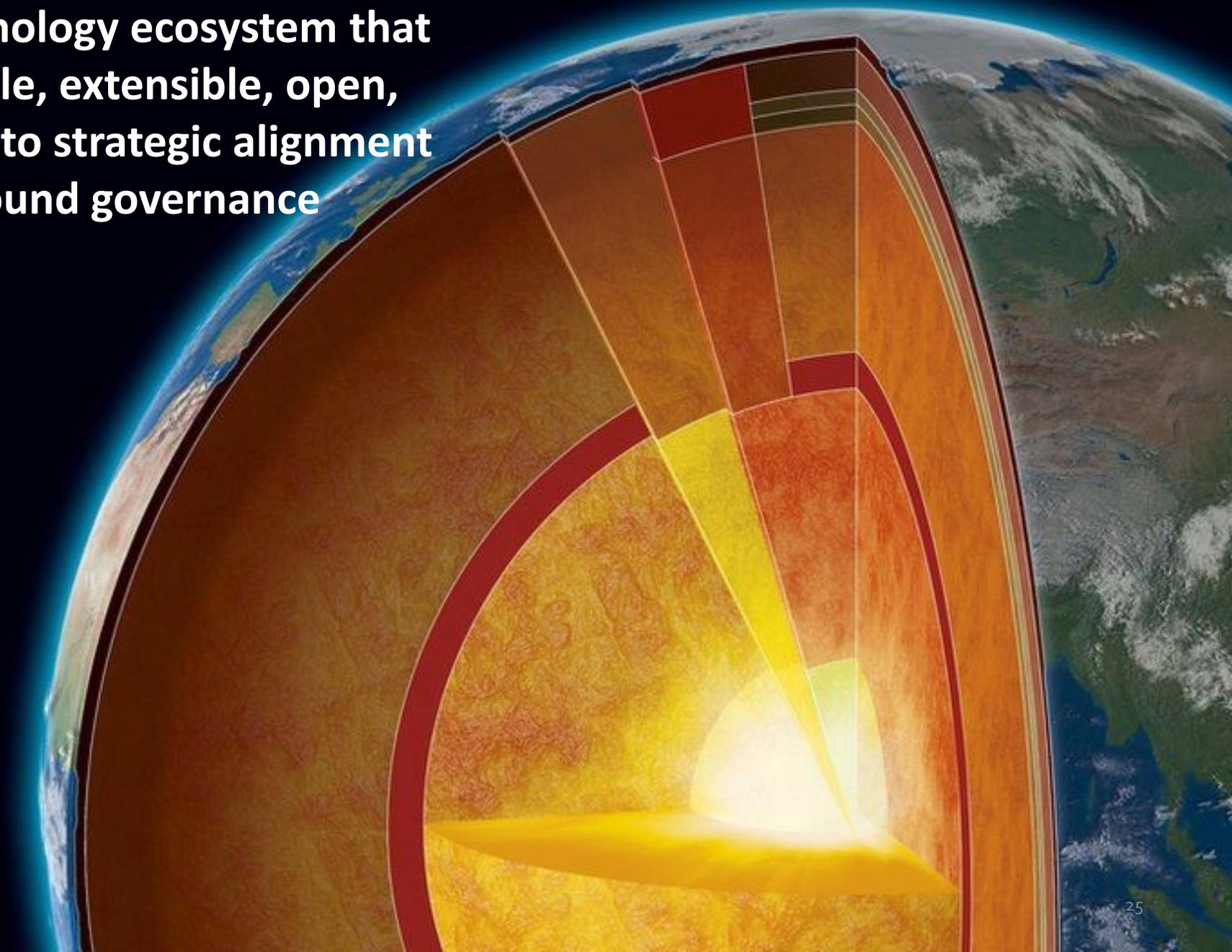
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Combination 4:
Traditional & modern
approaches



**A core technology ecosystem that
is adaptable, extensible, open,
and subject to strategic alignment
and sound governance**



Traditional

Modern



Traditional

Modern

IT programme governance to specify and oversee the core technology ecosystem

Outside-in business design, focusing on the user experience. Continuous agile development

Formal project governance

Technical design authority

Data governance frameworks

Outside-in business design

Low-code development

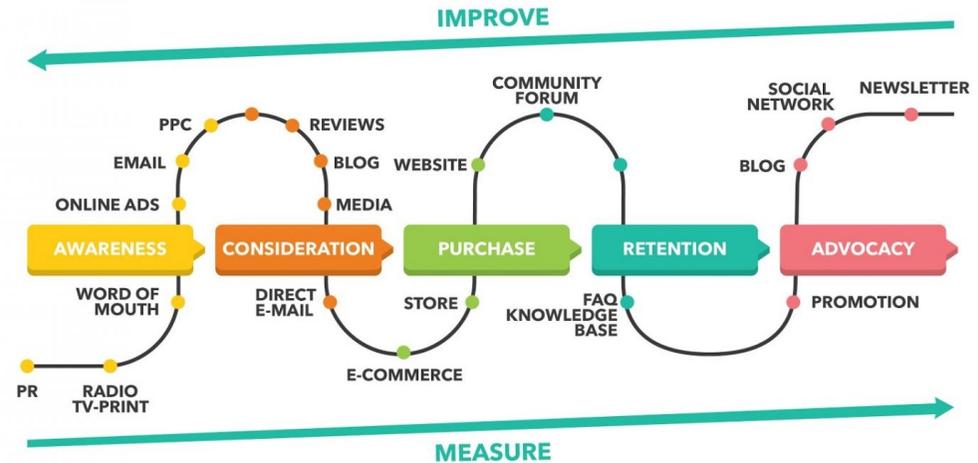
Agile development





Combination 5: Agile & Waterfall

Can you **really** go live with a new, big CRM system, replacing complex business-critical processes in an 'Agile' way?



Can you **really** continually innovate and deliver new 'supporter experiences' using 'Waterfall'?

Our first case study



Dan Lockeretz

Head of Systems, UnLtd

UnLtd

The foundation for social
entrepreneurs

Our Digital/CRM Journey

Dan Lockeretz, November 2020



Contents

- ✦ About UnLtd
- ✦ Our Digital/CRM Strategy Story
- ✦ A Look Back
- ✦ Key Messages



Contents

- * About UnLtd
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Our vision

A future where enterprising people are transforming our world for good.

Our mission

We find social entrepreneurs with bold solutions to today's challenges.

Through funding and support, we help them to realise their potential and create lasting change.



"In five to ten years it will be impossible to start a business with the sole objective of profit. There has to be social return as well"
Abi, Founder of Papi's Pickles

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Digital/CRM Strategy–triggers



Inflexible

Costly and time-consuming to change

- NEEDS to be quick and easy to change the system
- Self-sufficient change process (no coding)

Siloed

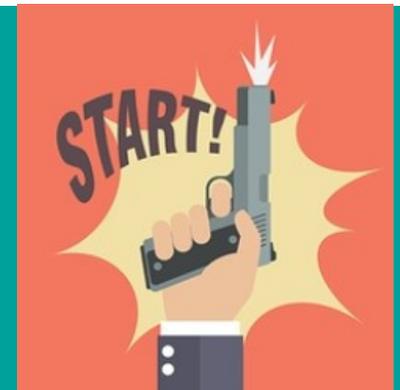
Lack of integration and only supporting Award Management

- NEEDS to integrate with digital tools and integrate the rest of the organisation

Outdated

Not user-friendly or multi-platform.

- NEEDS to work on any device/platform
- Improved UI (portal and CRM)



“Our tech does not support our organisational strategy”



Microsoft
Partner

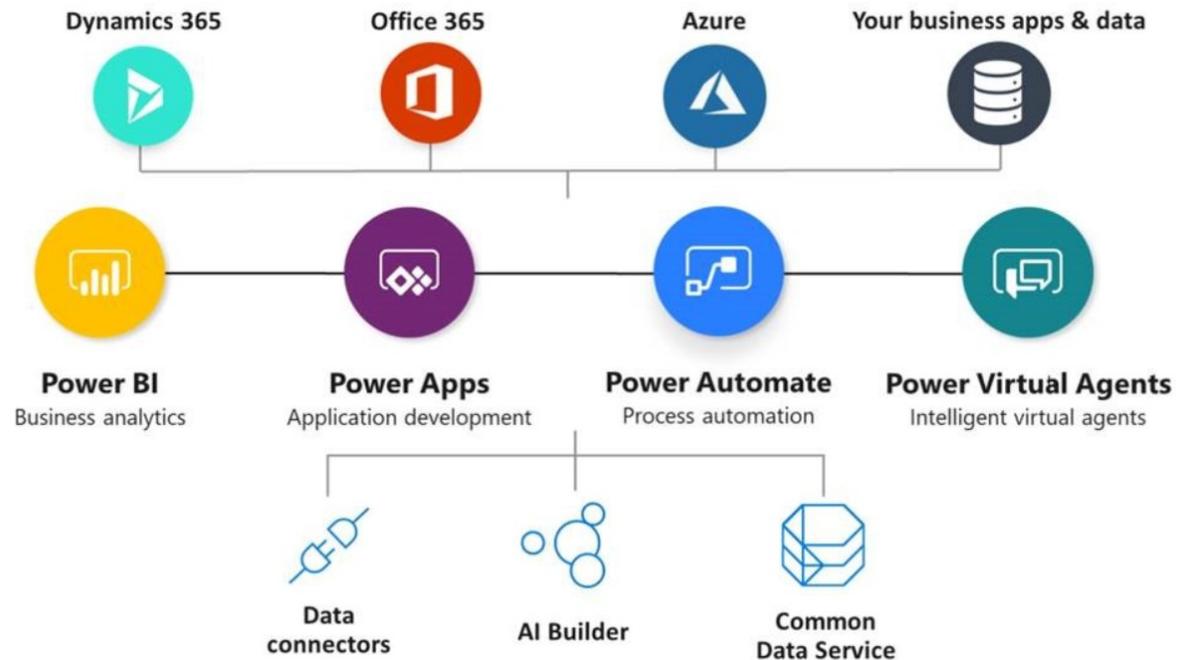


Gold Application Development
Gold Cloud Customer Relationship Management
Gold Cloud Platform
Gold Cloud Productivity
Gold Collaboration and Content
Gold Datacenter

System Integration

We put the System in place and hooked up the key Digital Tools.

- Outlook
- ClickDimensions
- MS Forms Pro
- EventBrite
- Power BI





The Low Hanging Fruit

We picked off the teams that had no system in place...

- Contact Management
- Connect (mentoring)
- Development/Partnerships
- Investment



Ready for the Challenging Bit

Preparing for the Award Management implementation phase and replacing the legacy system.



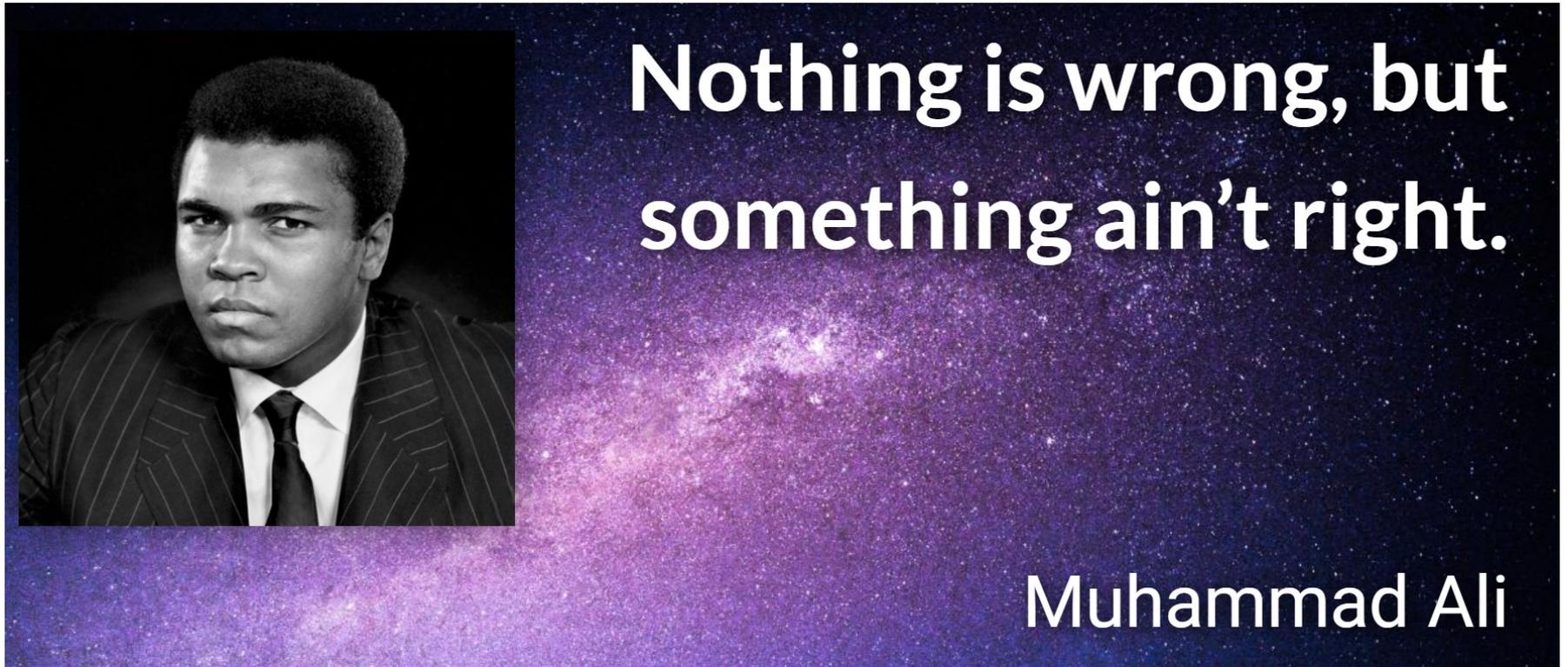
Ready for the Challenging Bit

Preparing for the Award Management implementation phase and replacing the legacy system.

Until...



The UnLtd Application Process....



The UnLtd Application Process....

What we noticed when we pulled our research together...

- People from Black, Asian, and Minority Ethnic backgrounds felt less connected to UnLtd and rated our application process poorly
- 75% of those with no higher education did nothing following a rejection
- Applicants with a disability reported lower levels of contact from UnLtd (e.g. fewer invited to events/workshops)

Conclusion: our application process was a barrier to the very people we try so hard to reach!

Implementation Strategy Decision Time!

Option A:

Replicate the current process knowing *'something ain't right'*?



Option B:

Wait to redesign the application process and build that?



Implementation Strategy Decision Time!

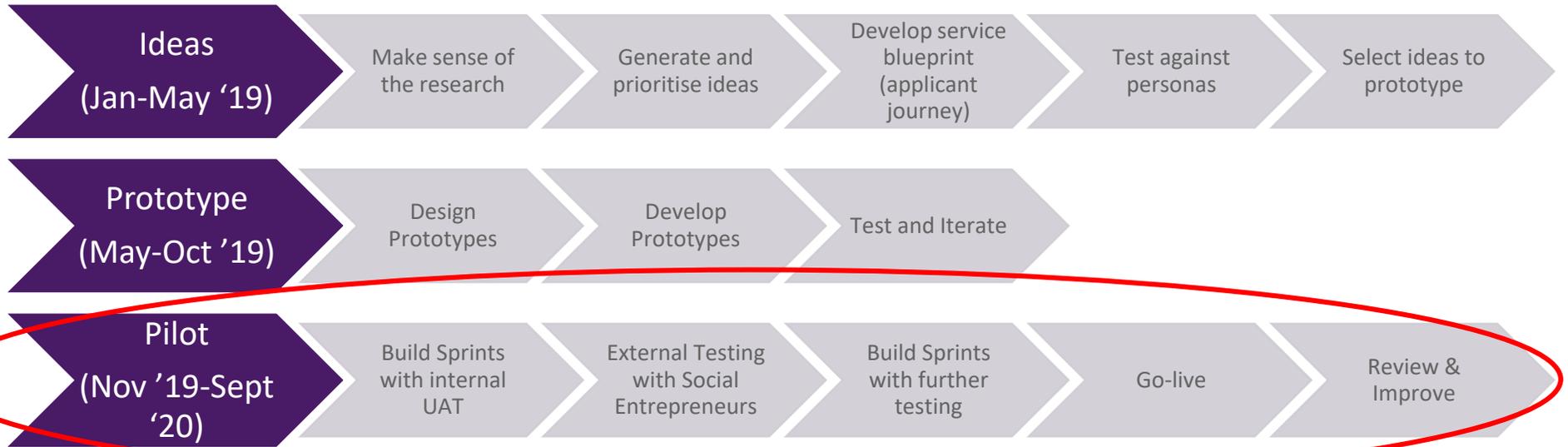
Option B.

Why? Because we could.

- Flexible tech platform
- Flexible partner
- Agile project methodology
- Developed internal skills through Phases 1 & 2
- Operating remotely (throughout Covid)



Designing the Application Process



From Design...

Complete your details Contact Us 

Register Login Start your application Complete your details Equal Opportunities **Getting to know you and your venture** Additional information Submit

Name of venture or proposed name:

Venture website:

Location of venture: geographically where are you working or planning to make a difference:

Save and Close
Guidance


BACK Question 1 of 8 NEXT

...to Reality

Contact Details 

Complete Your Details 

Equal Opportunities 

Getting to know you

What Stage are you at

Getting to know you

Name of venture or proposed name *

Venture website

Location of venture *

Geographically where are you working or planning to make a difference

Advertised Programmes

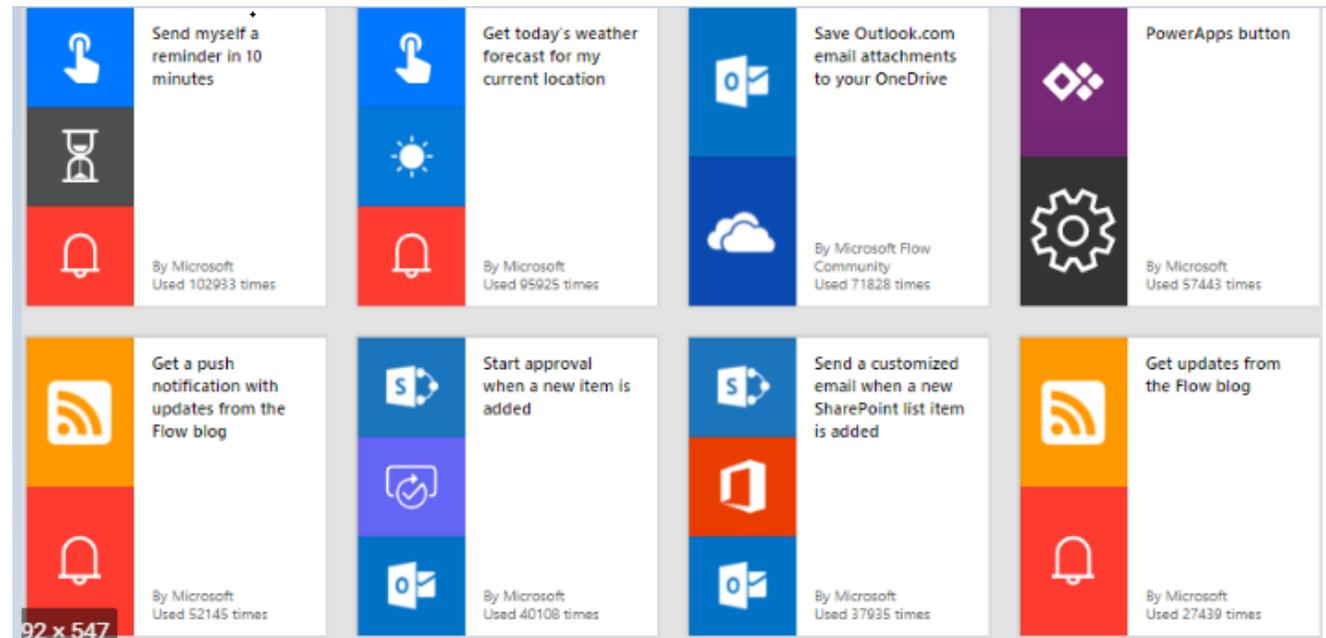
Please indicate which, if any, of our advertised programmes prompted you to apply?

[Add Programmes](#)

Meanwhile...System Development

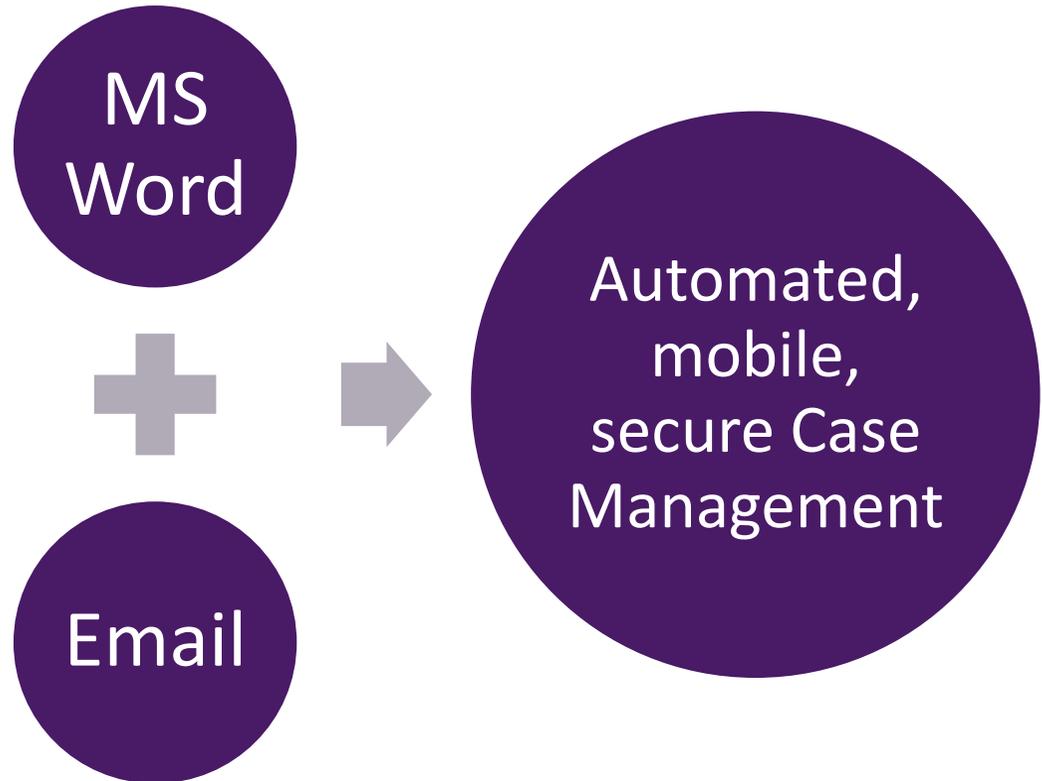
Unforeseen benefits using MS Flow and Microsoft 365 stack...

- Safeguarding
- References
- Surveys



Meanwhile...System Development

- Safeguarding example: modernising and securing our system and business process



Safeguarding Form

* Required

Section B - Details of the person about whom there is a concern

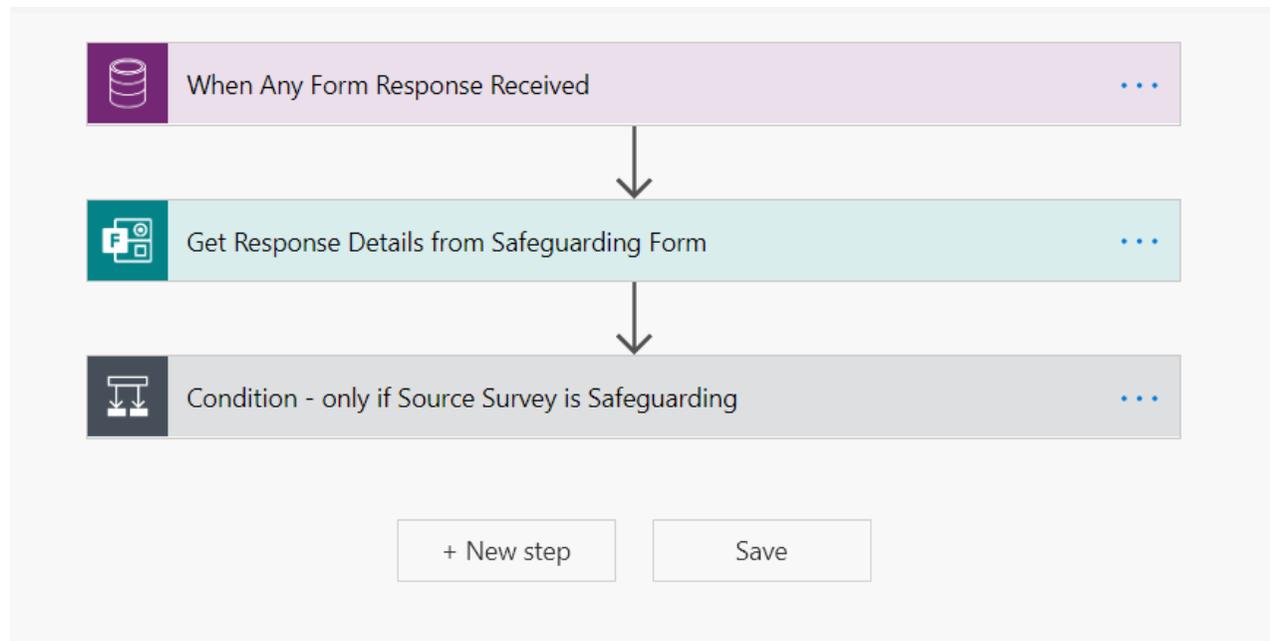
Please enter below all details known about the person about whom there is a concern as fully as possible; where unknown please leave blank.

B1. Their Name

B2. Their Address

B3. Their Telephone Number

B4. Their Date of Birth (if known)



Automated email to Safeguarding Team with secure link to Case on Dynamics containing the results of the submission

Case management – secure, mobile, defined business process flow with alerts

UnLtd UAT
SANDBOX

Save & Close Save & Route New Save Create Child Case Resolve Case Cancel Case Add to Queue Queue Item Details Assign

Case: Safeguarding Case Form

Joe Bloggs

Owner

Nuala Smyth

Created On

11/02/2020

10:29

Safeguarding Process
Active for 5 months

Identify & Assign (5 Mo)

Assess

Action

Follow-Up

Refer/Finish

Summary
Safeguarding Form Response
Related

CASE DETAILS

| | |
|--------------------------------------|---------------------|
| Case Title | * Joe Bloggs |
| Case Number | CAS-01022-F7X5R1 |
| Type | --- |
| Origin | --- |
| Person of Concern | * Joe Bloggs |
| Submitted By | --- |
| Is the person of concern under 18 or | --- |

DESCRIPTION OF INCIDENT, CONCERN OR DISC...

🔒 ---

TIMELINE

Timeline + ⌵ ⋮

Enter a note... 📎

Filter by ✕

Record type ⌵

Posts by ⌵

Auto-post on Joe Bloggs

Case: Created by **Nuala Smyth** for _Contact Joe ...

11/02/2020 10:29

Content

- * About UnLtd
- * Our Digital/CRM Strategy Story
- * A Look Back
- * Key Messages

What went well?

- Quick and significant improvements for teams with no system
- Digital tool integration early on
- Gained system advocates and good user adoption
- Built the new application process straight into the new platform

What didn't go so well?

- Delays in delivering CRM to core of organisation (old tech, frustrations, 'left behind', etc)
- Old application portal in place for far too long
- Two CRM's – one-way integration



Bringing the organisation with us

- Involved Award Managers in the design phase
- Shared the benefits of the implementation so far... 'living proof'
- Kept the info flowing



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Digital/CRM Strategy

- key messages



Strategic tech partner

- Find a partner not a supplier
- Shared approach to projects
- Critical friend

Flexible technology and build approach

- Adaptable
- Common API
- Developer environment
- Click not code

Design led

- The tech is there to support the design, but seek opportunities to take advantage of the tech

Digital/CRM Strategy - key messages



Long-term strategy but projects with agility

- Plan your roadmap
- Identify the steps to get there
- Expect diversions but the destination should remain the same

Bite-size chunks!

- Find the quick wins
- Identify your advocates

Challenges and changes guaranteed

- Seize opportunities
- Be ready to flex

Thank you!





Our Digital Journey So Far

Dr Dave Massey

Head of Strategic Intelligence

Who are the Trussell Trust?

Support over 1,200 food bank distribution centres throughout UK
provide emergency food and support to people locked in poverty

**distributed 1.9 million three-day emergency food supplies to
people in crisis in financial year 2019-2020**

campaign for change to
end the need for food banks.

Rapid Growth in number of food banks followed by year on year increase in emergency food provision



New strategy development leads to realisation that the "back office" is important and needs investment

Not just kit

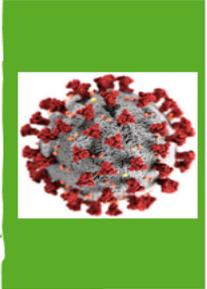
what are other words for back office?

administration, management, direction, control, command, charge, conduct, operation, running, leadership

Thesaurus.plus



In April there was an 89% increase in the number of emergency food parcels given out compared with the same month in 2019.

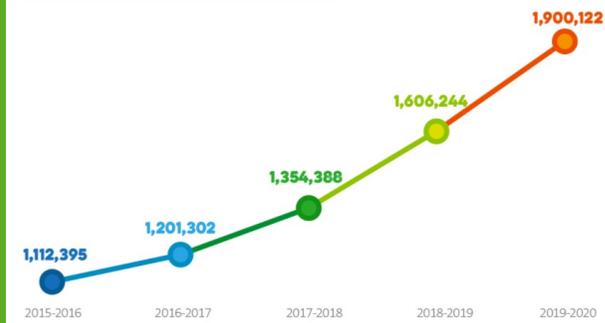


13,000 members of public offer support



3,000 Centrica employees volunteer

Rapid Growth in number of food banks followed by year on year increase in emergency food provision





New strategy development leads to realisation that the “back office” is important and needs investment



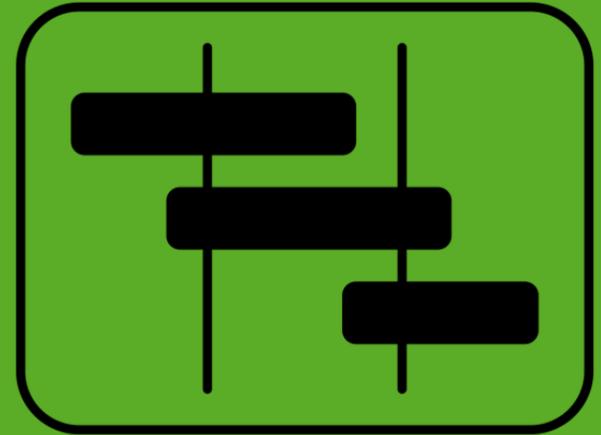
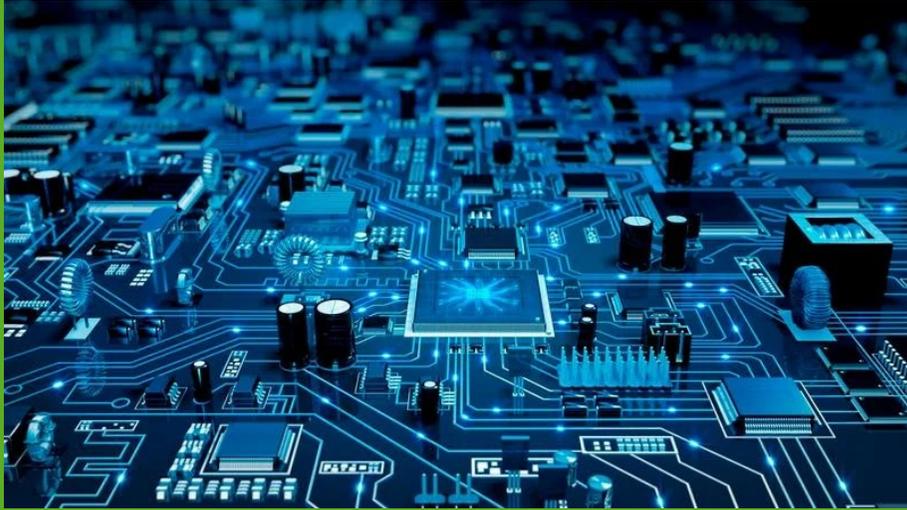
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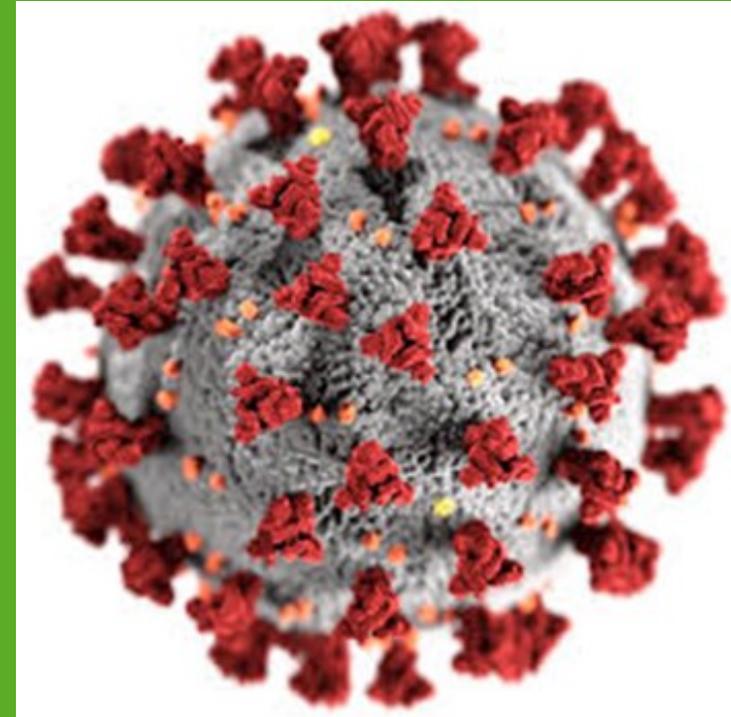


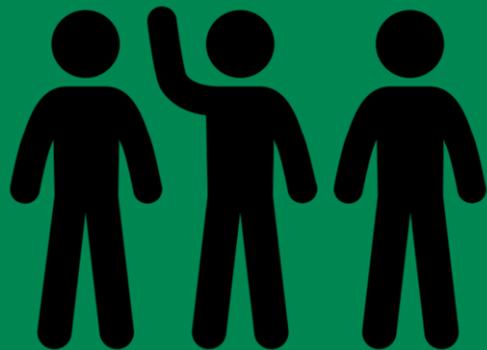
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Future – a 50/50 approach

- Balance of agility and process
- Internal and external focus, building on what we had but improving and learning as we go
 - New ways of working with colleagues
 - New ways of working with food banks
 - New ways of interacting with supporters
 - New ways of working with volunteers
 - New ways of working with our data
 - New ways of working with those with experience of needing to use a food bank



What have we learnt?



- Quite rightly focus on the front line BUT the back office needs to catch up some point – schedule in reviews to sense check the need
- Don't be afraid of that big review and get external help – the external perspective will bring different experiences and a fresh pair of eyes
- Make choices and decisions
 - Need evidence and a clear business strategy
- Remember this is not just tech, but process and culture are equally important
- Flexibility is key
 - Build it in to the plan as you don't know what the future holds
 - Seize opportunities, COVID has brought in some positive changes that have improved our operations



Our Digital Journey So Far

Dr Dave Massey

Head of Strategic Intelligence

Breakout Room Discussions



What's stopping you from implementing your digital strategy?

What area of digital technology is most important for your organisation going forward?

Re-convene for feedback from each group.

Poll, Thanks & Goodbye!

Upcoming events...

4 February 2021 – CRM and cake IX

www.adaptaconsulting.co.uk/adapta-events

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