

TIP SHEET

Six Steps for Implementing New Technology

At any given moment, many organizations need to implement new technology for their growing organization. But first, you must evaluate your current business processes to identify inefficiencies. Follow these six simple steps to successfully evaluate your processes and determine where new technology can have the greatest impact at your nonprofit organization.

- 1 Assemble the right team.**
Gather your team members and representatives from the necessary departments. For example, if you are going to refine your gift entry process, make sure to include someone from your fundraising and finance team. A fresh set of eyes can bring an unbiased perspective to the mix and can often be the best voice of reason.
- 2 Conduct industry research to learn best practices.**
Review some of the national associations that advise nonprofits involved in process changes. Read any white papers and subject matter analyses on new trends for the processes under review.
- 3 Determine and evaluate your current state of business.**
Begin to document every touchpoint in the processes you're examining. Take every action into account: manual, automated, in your office, and in offices connected to your processes.
- 4 Identify your desired future state objective.**
Lead your team with the goal of achieving your desired future state. The purpose is not to find a more efficient way to do the same process; your goal should be to design a sustainable process that can automate the mundane steps, with staff members providing oversight and review. Technology can follow logic, but people offer good judgement.

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Document changes.

Map your new processes to verify all compliance requirements are being met. Document each new step, action, and decision. Communicate these new steps to your team, and confirm that everyone is on board with the new plans. Make sure you communicate with the remainder of the organization, so everyone is aware changes have occurred, then train all staff to monitor and review processes.

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Celebrate!

Once you've mapped out your new processes and implemented new technology with your teams, don't forget the most important step—celebrating the success of gained efficiencies and greater service to supporters!

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