

Strategic Differentiators in Successful Enterprise-wide Technology Projects

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Presenter



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I have served as the interim Chief Information Officer (CIO) for national organizations seeking to transform how they work, how they leverage data, and how technology accelerates their work. I currently serves as the CIO for the Lymphoma Research Foundation.



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Build is passionately independent.

Build does not accept compensation from or partner with vendors. We put our clients first. It is our clients' needs and priorities that drive our search for the right vendors, solutions, and implementation partners.

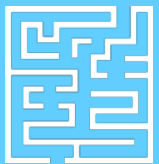


Technology strategy is organizational strategy

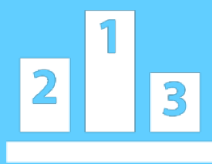
Build's Services



Interim or
Part-Time CIOs



Assessments and
Roadmaps



Software
Selections



Implementation
Support



Outsourced CRM
Management



A blurred office background with a desk in the foreground. On the desk, there is a calculator, a pen holder with several pens, an open notebook, and some papers. A blue office chair is visible behind the desk. The background shows shelves with binders and a whiteboard.

More than 50% of nonprofit technology projects fail.

The technology moves forward... but the organization does not.



47%

OF ALL CRM PROJECTS FAIL¹

1. <http://www.zdnet.com/blog/projectfailures/crm-failure-rates-2001-2009/4967>
2. <http://blog.e2benterprise.com/the-common-causes-of-crm-system-project-failure-according-to-recent-forrester-research-survey/>

40%

REPORT
STRATEGY
WAS TO BLAME

42%

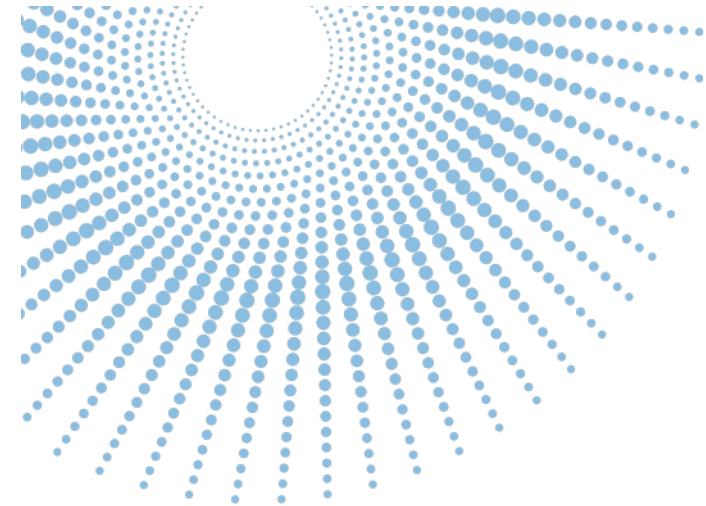
REPORT
PEOPLE
WERE TO
BLAME

44%

REPORT
PROCESSES
WERE TO BLAME

35%

REPORT
TECHNOLOGY
WAS TO BLAME²



Six Differentiators

01. UNDERSTAND AND COMMUNICATE THE SCALE OF THE CHANGE
02. SURFACE AND ADDRESS DIFFERENCES OF OPINION
03. INTEGRATE A DATA STRATEGY
04. IDENTIFY AND PLAN FOR CHANGES IN STAFFING
05. PLAN AND BUDGET FOR A MULTI-YEAR TECHNOLOGY INITIATIVE
06. ADDRESS WANING INTEREST AND GROWING FATIGUE

01 UNDERSTAND AND COMMUNICATE

THE SCALE OF THE CHANGE

THE HOW

- Engage with as many diverse stakeholders as possible. Before you think you should
- Capture the expected impacts and keep refining them
- Ensure leaders understand who will be impacted and how they'll be supported

WHEN



THROUGHOUT

RESOURCE

[Build Change Management Impact Catalog](#)



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02 SURFACE AND ADDRESS

DIFFERENCES OF OPINIONS

THE HOW

- Everyone should get a voice, even if they don't get a vote.
- Measure initial sentiment and track it throughout the course of a project
- Invest time in opportunities for informal, and formal listening sessions.
- Consider the use of a survey to capture overall sentiment

WHEN



THROUGHOUT

Sample Change Sentiment Survey Questions

1. I understand why we are changing.
2. The purpose of this change makes sense to me.
3. I think this change is necessary.
4. I have been appropriately involved in this change.
5. I was given adequate notice that this change was occurring.
6. The vision of this change was clearly communicated.
7. I was given adequate time to think about the change and internalize it.
8. I was given the opportunity to ask questions about this change.
9. I feel confident that I will be given adequate resources and support to manage the new way of doing things.
10. I will be appropriately rewarded if I effectively implement this change.
11. I have the necessary skills and knowledge to do what is expected of me.
12. This change will positively impact important existing working relationships.
13. I truly believe that higher levels of management fully support this change.
14. I believe I have more to gain than to lose from this change.
15. There is nothing that I am aware of that would prevent this change.
16. This change is compatible with our organization's culture and values.
17. This change honors the past rather than making it appear as though mistakes were made.
18. I trust the group that recommended this change.
19. I see the group that is leading this change as capable.

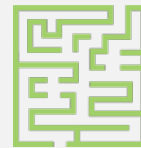
03 INTEGRATE

A DATA STRATEGY

THE HOW

- Many projects that may originate as a technology problem, may be a data problem
- Identify what data is important, and the place(s) that it should be stored
- Identify operational, process and technology gaps.
- Ensure that your project advances not just technology strategy, but data strategy

WHEN



ASSESSMENT



72%
GLOBAL CIOs

Report that data quality is going impact AI goals between now and 2025.

[CIO vision 2025: Bridging the gap between BI and AI](#)

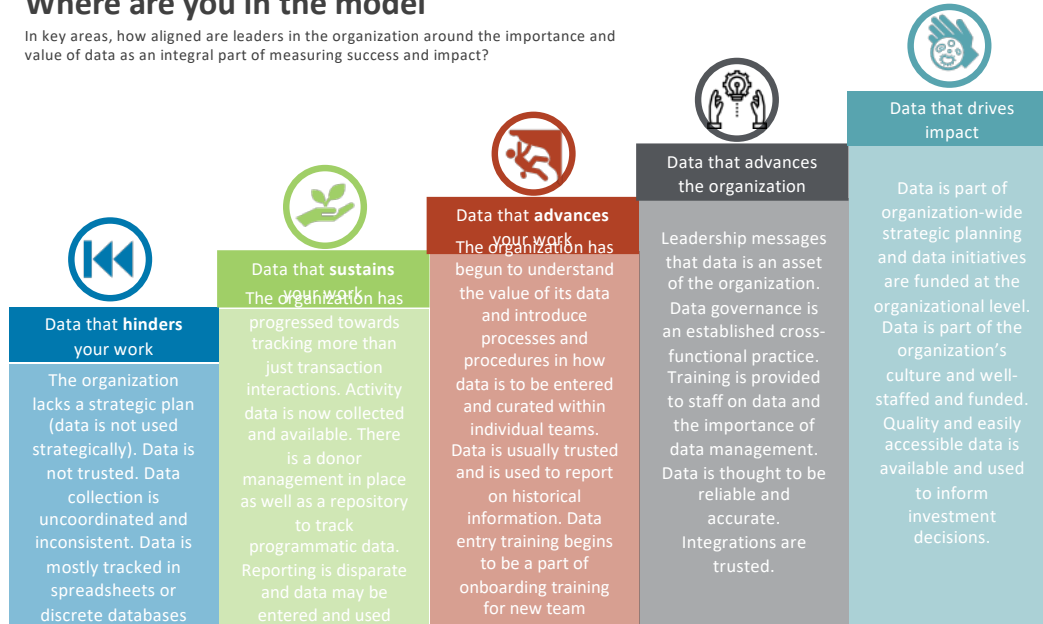


Build Consulting Data Maturity Model™

Client name

Where are you in the model

In key areas, how aligned are leaders in the organization around the importance and value of data as an integral part of measuring success and impact?



Key Opportunities to Move Forward

1. Opportunity 1
2. Opportunity 2
3. Opportunity 3

Data Maturity Scorecard

Based on interviews and survey data, this visual aims to provide a graphical representation of how leadership (or key stakeholders?) prioritizes data within their work

Data Centric Culture

Organizational vision for data is well defined	Low
Data is use to inform decision-making and planning	Low
Data is valued and trusted	Low

Democratization of Data

Data is accurate and available in or near real-time	Low
Centralized reporting is available to leadership and staff.	Low
Investments are made into data strategy and capacity	Low

Data Literacy

Roles in data management exist within the Organization	Low
There is a well defined logic model	Low
Automated system integrations exist	Low

Organizational Metrics

Data and/or governance KPIs or OKRs exist	Low
Data is helping the organization better articulate the work it does	Low
Impact data is available to drive constituent engagements	Low

Data Governance

A strong governance framework is in place.	Low
Roles in data management exist and are understood	Low
Data is protected and hygiene processes are in place	Low

04 IDENTIFY AND PLAN

FOR CHANGES IN STAFFING

THE HOW

- Identify new skills that will be required
- Assess/inventory the skills that your current staff have
- Create pathways for upskilling
- Budget for new staff & vendors

WHEN



SELECTION
IMPLEMENTATION

RESOURCE

[Build Consulting Proficiency and Interest Matrix](#)



Build Consulting Proficiency and Interest Matrix

	Data analysis		Data visualization		Communication		Project management		Cybersecurity	
	Proficiency	Interest	Proficiency	Interest	Proficiency	Interest	Proficiency	Interest	Proficiency	Interest
David	2	1	0	0	1	2	2	1	3	1
Monique	1	2	1	3	0	2	1	3	2	0
Enrique	0	3	2	0	2	3	1	0	1	2
Micah	2	1	3	2	1	3	0	2	1	3
Sue	2	1	3	2	3	3	1	2	1	3
Proficiency Key	0=Not Proficient									
	1=Somewhat Proficient									
	2=Proficient									
	3=Very Proficient									
Interest Key	0=Not Interested									
	1=Somewhat Interested									
	2=Interested									
	3=Very Interested									



05 PLAN AND BUDGET

FOR A MULTI-YEAR TECHNOLOGY INVESTMENT

THE HOW

- Make sure change and project management are not the first on the cutting block
- Ensure that budget includes for long-term staffing changes
- Identify places where staff augmentation, especially during implementation, will be needed

WHEN



SELECTION



WHAT LEADERSHIP MAY BELIEVE ABOUT TECHNOLOGY BUDGETS

ASSESSMENT

SELECTION

IMPLEMENTATION

ONGOING

“WE KNOW THE ROAD AHEAD”

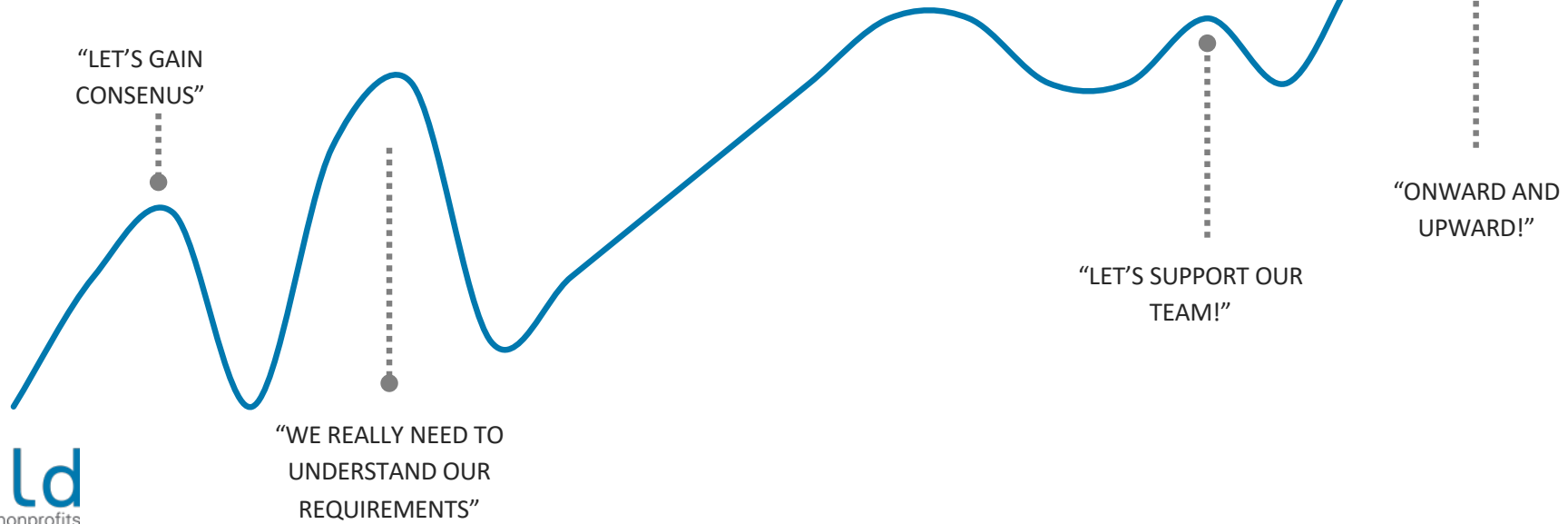
“LET’S SCHEDULE SOME DEMOS”

“ALL HANDS ON DECK!”

“CARRY ON!”



WHAT A TECHNOLOGY BUDGET SHOULD FACTOR IN



06 ADDRESS WANING INTEREST

AND GROWING FATIGUE

THE HOW

- Many hands (voices) make light work
- Develop a communication plan
- Acknowledge setbacks. Share successes.
- Create milestones. Celebrate them

WHEN



IMPLEMENTATION

RESOURCE

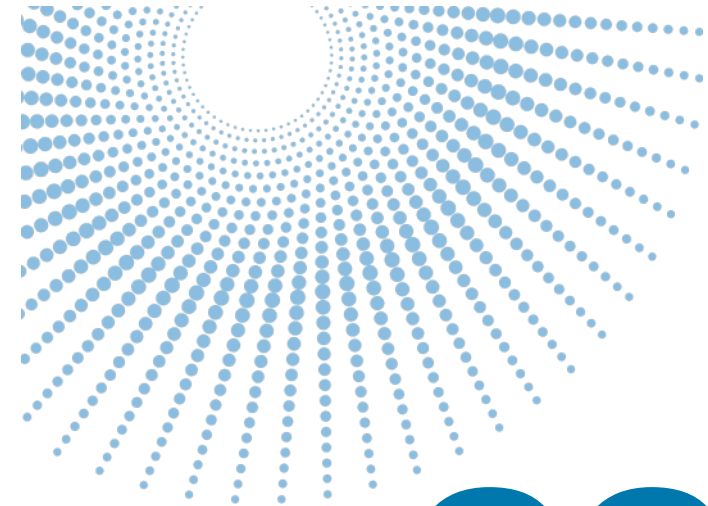
[Build Communication Calendar Template](#)



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Build Consulting Communication Plan Template

Project Name								Q1 2024			Q2 2024		
								Jan	Feb	Mar	Apr	May	Jun
Theme	Message/Goal	Audience	Frequency	Format/Channel	Creator	Sender	Status						
Project Kick-Off													
Announcing a new CRM for RWD Foundation	Share project charter messaging	All Staff	One-time	Email	Project Sponsor	CEO	Not yet started	X					
Impact of the month	Share expected impact from the project	All Staff	Monthly	Teams	Project Lead	Project Lead	Not yet started	X					
Meet our vendor!	Meet the implementation Team	All Staff	One-time	Zoom	Project Sponsor	Project Sponsor	Not yet started		X				
Workflow Design													
Name	Specific content						Not yet started						
Name	Specific content						Not yet started						
User Acceptance													
Name	Specific content						Not yet started						
Name	Specific content						Not yet started						
Go-Live													
Name	Specific content						Not yet started						
First Month-end													



OO+NT=E00

Old Organization + New Technology = Expensive Old Organization

Strategic Differentiators in Successful Enterprise-wide Technology Projects

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