

Is Your Technology Really Working?

Best Practices for Tech Audits

Hi! I'll be your guide today



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I like people and happen to work
with software.

20 Seconds about Skvare

(pronounced SQUARE)

We help others help others

- *Technology Strategy*
- *Web Hosting*
- *Ongoing Support*
- *Mail Services*



<https://skvare.com>

Who are you?

Remember this:

Technology is a mirror.

It can reveal your broken processes and workflows.

*A good tool backed by the right process and people
is a super power.*

Why this matters

Time = \$\$\$\$\$\$, right?

Relationships take time

... AND ...

- Security: You have information about live animals*
- You have the power to choose*



Learning Objectives



- "No stone left unturned..." Ways to discover and pinpoint opportunities for automation
- How to plan for and manage internal discussions to evaluate technology, AND how to make the discussions actionable
- Ways to measure ROI of technology time/money investment

Who is at the table?



Pick your leader

Keyword: Coordinator

- *Are they already involved? Can they recognize the skills, talents, and knowledge in others?*
- *Do they seek challenges?*
- *Can they explain themselves?*
- *Are they doing things to help their coworkers succeed?*
- *Have they already tried to improve workflows or procedures internally?*

I mean it. Pick your leader.

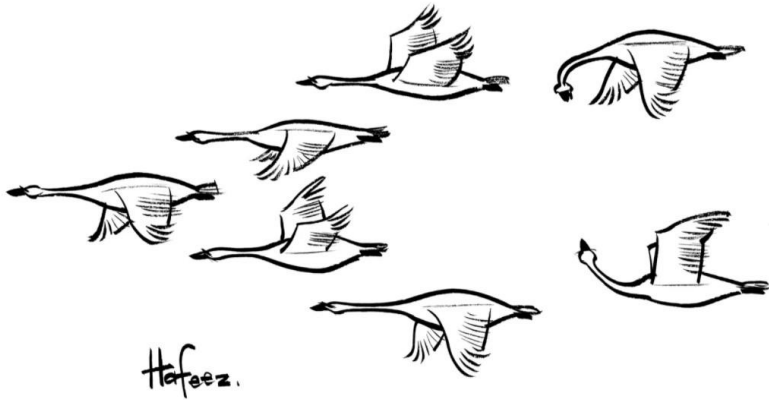
Assessment

Ranking 1 (no) to 3 (absolutely)

Want to capture more nuances? Use 1 to 5 instead.

Team Member	Actively involved / engaged	Seeks Challenges	Clear verbal & written communications	Helping others succeed	Has already made improvements	Comfort with tech	Other jobs - time pressures
<i>Judy</i>	2	1	3	2	3 -in the past	2	<i>Volunteers</i>
<i>John</i>	3	3	2	2	3	1	<i>Events</i>
<i>Jill</i>	3	2	2	3	1	3	<i>Programs</i>
<i>Jenny</i>	2	1	1	2	2	2	

Who owns your technology? Who owns your strategy?



"We tried forming a collective—no leader, no structure, no power dynamics—but we just ended up flying in a circle over Winnipeg."

Without a leader, whoever you may engage or hire to complete a technology audit will be hindered in bringing their full value to the table.

In short, you'll probably still have to pay the same, but you won't see the full value of those dollars.

*Do you have the right people on the bus?
Are they in the right seat?*

Let the Audit Begin!

This process requires inquiry



“How to Practice” by Ann Patchett, New Yorker

A dozen etched crystal champagne flutes sat on the very top shelf, so tall I could just barely ease them out. A dozen? I had collected them through my thirties, one at a time. Some I’d bought for myself, others I’d received as gifts, a single glass for my birthday, wrapped in tissue paper, as if I were a bride for an entire decade in which I married no one. Had I imagined that, at some point, twelve people would be in my house wanting champagne?

Decide what's on the table

It's not what's on the table that matters,
☞ *it's who is in the chairs.* ☞



What is more important for you to care about right now?

Website audit?

CRM audit?

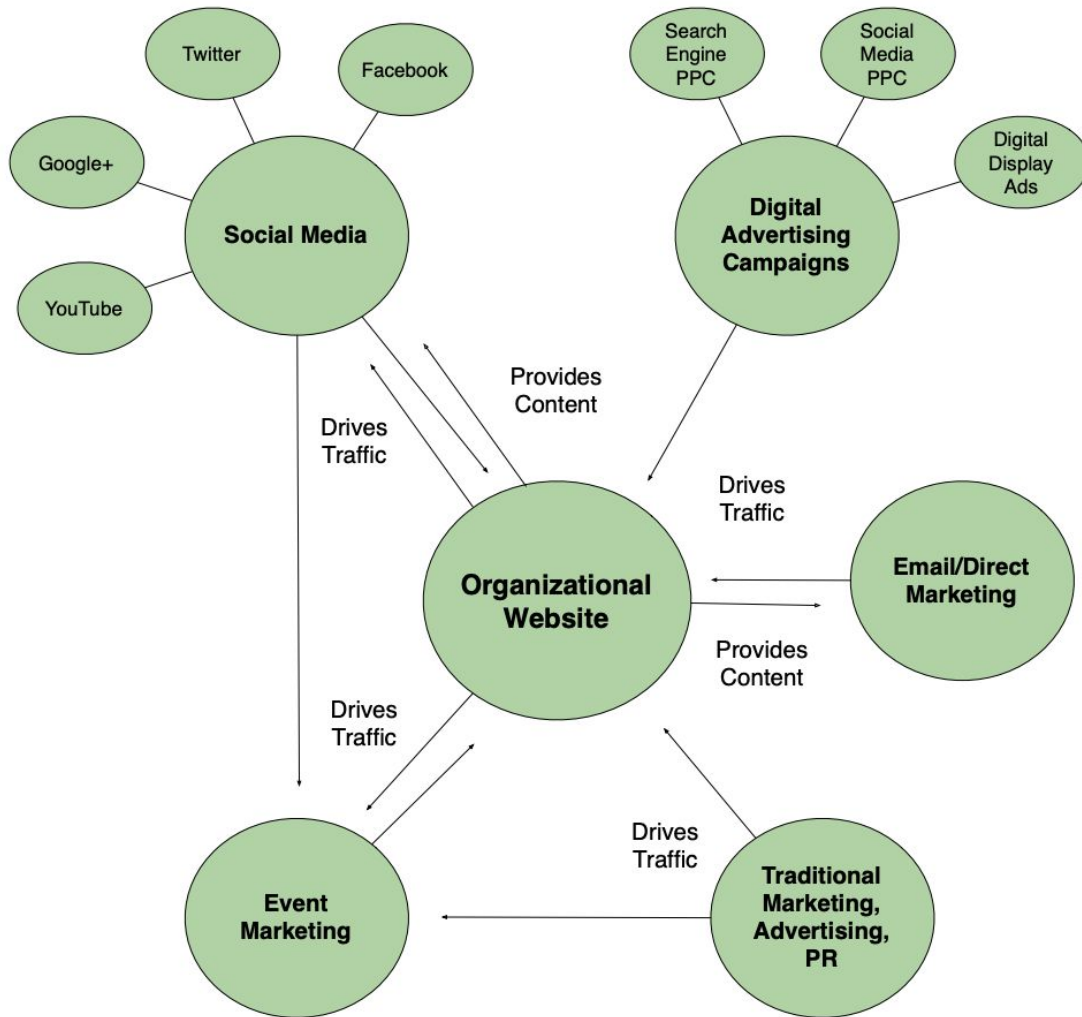
Data audit?

Security audit?

Get on the balcony.

Get Started...

Website Audit



What is your digital landscape?

Powerful Questions: Website Audit



- *Online Strategy Objectives*
- *Target Audiences*
- *Desired Action Taken*
- *Programmatic Priorities*
- *Platform Integrations*



Do you have a defined digital strategy?

Website Audit: Example

Online Strategy Objectives

1. Increase awareness of services within the community
2. Bring in new applications
3. Raise funds for programs

Target Audiences

1. Donors
 - a. Younger 20-40 age group - interested in...
 - b. Clients & family members of past clients
 - c. New foundations / grantmaking agencies
 - d. Loyal grantmakers with established relationships
 - e. Loyal individual donors (often giving since 1970's)

Target Audiences cont.

2. Clients
 - a. Potential (short waiting list)
 - b. Past clients (testimonies)
3. Community Members
 - a. 5K event participants
 - b. Schools
 - c. Church groups
 - d. Senior groups
4. Partners

Website Audit: Example

Desired Action Taken:

1. Donate / sponsor
2. Apply
3. Connect on social media (Facebook, Twitter, LinkedIn, Instagram)
4. Sign up for email updates (Constant Contact)
5. Request a tour (contact form)
6. Share your story (separate content type)
7. Contact Us

Programmatic Priorities:

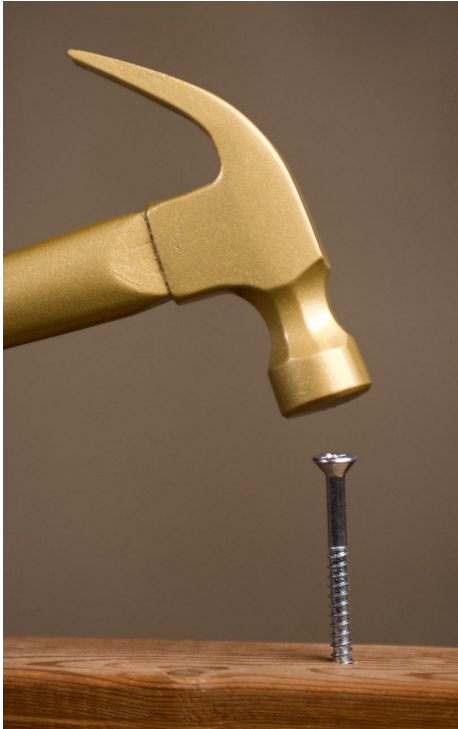
1. Demonstrations / tours
2. Grow base of local applicants
3. Highlight current fundraisers (news)

*Now, how well are you doing?
You have your stick. Time to measure.*

Get Started...

CRM Audit

Powerful Questions: CRM Audit



(Must be led by someone who knows the system)

- *What 3 things, if changed, would make doing your job more straightforward?*
- *How do you use the system?*
 - *This isn't a theory exercise ... pull up a chair.*
 - *And remember... you're curious, not opinionated.*
- *Where else do you keep data?*

Walk me through...

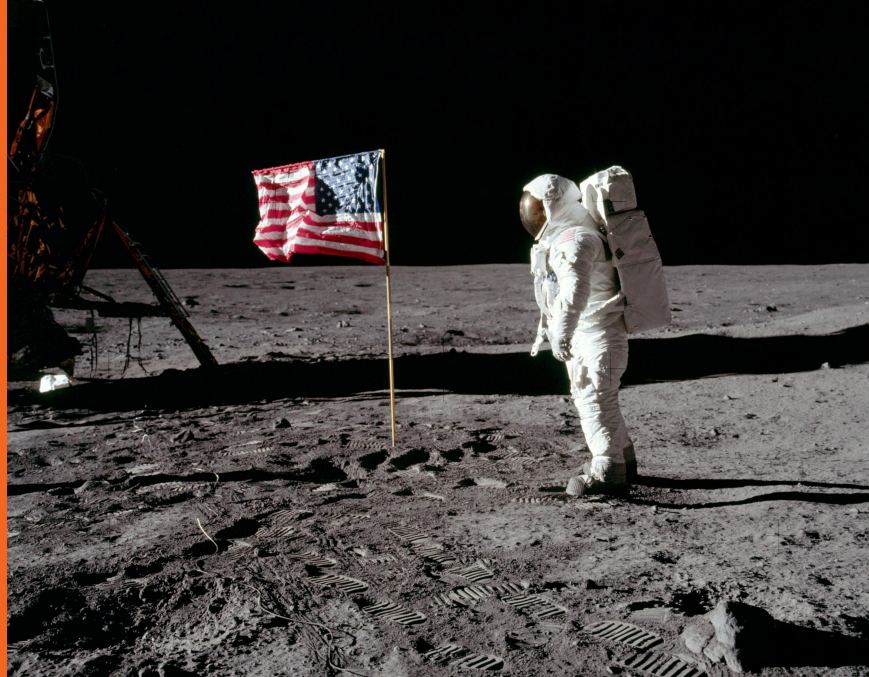
- *What areas of the system do you use most often?*
- *What areas of the system do you occasionally use?*
- *See how they do their job...*
 - *How you create a donor... record a donation... find recent donors...*
 - *How you find event participants... find sponsors... create sponsors...*
 - *How you create a mailing... track opens... create groups...*
 - *What do you do with that data? (Find the hidden spreadsheets!)*
 - *Where you do find yourself confused?*

Learn from Nursing... Never Settle



- *Tech is not just one thing.*
- *Open Source vs Proprietary*
- *Out-of-the-Box vs Custom*
- *No one's a magician (except magicians)*

There is likely more your system can do.



Also... we went to the moon without iPhones.

Get Started...

Data Audit

ROI ... the Expenses

Possible Expenses

- Licensing
- Hosting
- Customization
- Data migration
- Training
- Support
- Disposal/recycling of old technology
- Staff time
- Disruption and frustration
- Opportunity cost

Powerful Questions: Data Audit

- *Where are we collecting data?*
- *Where do we already have data?*
- *What data do we collect?*
- *What do we do with it?*
- *Where do we store it?*
- *Who do we share it with?*
- *Who is responsible for it?*
- *What do we do when we're done with it?*

Starting your inventory... continued

- *Do the people whose data we collect know we have it?*
- *Do they know what we do with it?*
- *Does it identify them personally?*
- *What do we do if they want their data back?*

Think in tables

Inventory	Why we do it	Tool we use	Point Person	Everyone else involved	Who else could do it?
Data we collect					
What we do with data					
Where we store data					

What You Have VS What You Need

	Current state	Future state	Gap	Actions to close gap
What	What happen?	What should it look like?	What is different?	What will be done to address the gap?
Where	Where is the confusion	Where will it change?	Where will it be different?	Where will it be addressed?
When	When is it done?	When will it change?	When are the differences needed?	When it will be addressed?
Who	Who does the work?	Who will do this?	Who will identify the gap?	Who will make the decision?
How	How is it sequenced?	How will it be timed and resources?	How will the gap be improved?	How will it be rolled out?

Resources

Templates

[Tech Impact: research, insights, & assessment tools](#)

[Tech4Good Denver - Technology Roadmapping Workshop](#)

[Build Consulting: Technology Roadmap](#)

[Creating a Digital Strategy](#)

Questions? Contact me



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