CHECKLIST

Are You Ready for Digital Transformation?

Is your organization ready to start the ongoing process towards Digital Transformation? Use this checklist to find out. And, if you're missing a step, don't worry! Check out the Resources page on CharityGrowthAcademy.org to help.

☐ **Do you have the basics in place?**

Is your organization set up with and actively using Google Workspace, Microsoft 365, or another cloud-based productivity suite? If not, find out how to do this with TechSoup Canada. "Both Microsoft and Google have nonprofit program offerings. Check your organization's eligibility for their programs.

☐ **Do you understand why you are doing this and what you want to get out of the process?**

If not, take time to prepare a brief or a backgrounder document to share with other stakeholders.

What would success look like to you? To figure this out, start by identifying current pain points (e.g. unreliable data means reporting takes longer than it should, or fundraising stewardship is inconsistent because we have to remember to check for new gifts and then notify our Board Chair).
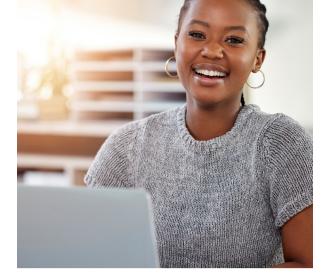
Next, think about what you could do with your resources if the problems were solved.

☐ **Do you have the support of your Board and other leadership stakeholders?**

Digital transformation will need to be an organization-wide effort to succeed, and your leaders will be responsible for bringing the whole staff along. Key questions to ask at all levels of the organization, but especially leadership:

- Do they understand the goals of this work and are they ready to champion it in the organization?

- Are they open and curious about new ways of doing things and new ways of working together?

- Do they understand that staff time will be needed for exploration, learning, and implementation? Are they themselves ready to learn new habits and skills?

- Are they comfortable with the potential for disruption in the organization as change is being made?

☐ **Have you identified a digital transformation leader, or small team, at your organization?**

To ensure progress in an already busy organization, it's key to appoint someone to lead the initiative. Look for a person or two who:

- Has knowledge about the programs and activities of the organization and is tech curious.

- Has influence within the organization. This doesn't have to be a manager — cultural influence holds a lot of weight

- Prioritizes well and is motivated to do this work.

☐ **Do you have a resource plan?**

The cost of most cloud-based tools that will support your digital transformation have become very affordable. The bigger cost will be staff time to do this work.

- How will you free up a few hours per week for your digital transformation lead/leaders?

- Can you budget an afternoon or two a month for staff to learn and practice new skills?

- Have you considered the time needed across the organization for consultation and implementing change?