

NONPROFIT TECHNOLOGY NO FILTER PAIN POINT ACTIVITY

Are you trying to decide whether you need to move into a new CRM, donor database, email marketing tool, online fundraising system, or event management platform? Use this simple three-step process to know for sure!

1 GRAB YOUR TEAM FOR A 90 MINUTE MEETING. BRING SNACKS.

Using a white board or flip charts, spend 20 minutes documenting every single problem, pain point, and issue related to your current system. This is not the time to be politically correct - if it's a problem for one person or everyone, it goes on the list.

2 CATEGORIZE YOUR LIST.

Now you're going to spend 20 minutes tagging each item as an ISSUE or an OPPORTUNITY:

- **Issues** are problems, pain points, or workarounds.
- **Opportunities** are things that you need or want to do but the current system can't handle them.

3 ASK YOURSELVES THESE TWO CRITICAL QUESTIONS.

- **WILL A NEW SYSTEM FIX, IMPROVE, OR REMOVE OUR ISSUES?**
- **DO WE NEED A NEW SYSTEM TO RESPOND TO NEW OPPORTUNITIES?**

If the answer is no: You might be better served by investing in updates, training, or development in the system you have. Share your list with the software provider or consultant and make a plan to tackle those items.

If the answer is yes: A move might be in your future. Take the next step and look at your budget for a new system, and set a time frame for a software evaluation and selection project.



Maureen Wallbeoff

Practical Wisdom for Nonprofit Accidental Techies
meetmaureen.com | 508-744-3366