



Why a Technology Assessment Will Benefit Your Organization



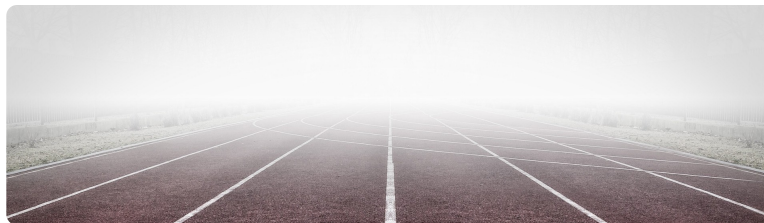
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TECH AUDITS AND ASSESSMENTS CAN HELP YOUR ORGANIZATION PLAN AND BUDGET WITH MUCH GREATER CLARITY AND INSIGHT

The typical small to medium nonprofit cannot afford an IT employee and has little to no technical roadmapping in place which can lead to inefficiencies and opportunity loss. Even larger organizations often need an unbiased, external expert to help clarify challenges and germinate ideas and options. The challenges are many, yet the most challenging is ensuring the organization has a clear understanding of the technology landscape – how the variety of services and tools can help their organization's internal processes and external communications – and can make educated decisions on where to spend their hard earned dollars.



WHAT IS A TECHNOLOGY ASSESSMENT?

The Technical Assessment, or Audit, is an investigation conducted by a technology consultant, by way of meetings and examination of data such as reports, forms, spreadsheets, and so on. During the investigation, technology assets will be identified and cataloged. Every system used to conduct operations will be described and classified, including in some cases maps of important data flows within the organization and between outside actors (partners, clients regulating bodies, etc.).

- Certain key processes, or lifecycles for products and services, will be described in some detail so that maps of the data flow and/or integrations of systems can be created
- Impressions from employees about what changes are required, and other feedback that invariably arise in these discussions will be collected and delivered as a part of the final report
- Finally, the consultant will deliver a report containing the technology inventory, process maps and key feedback from staff

WHAT ARE THE GOALS OF A TECHNOLOGY ASSESSMENT?

The goals are to generate wisdom about systems and their integrations to identify opportunities for savings and capital investment to drive greater labor efficiency and accuracy (quality), lower operating costs, and increased visibility into all aspects of the organization and its operations:

- Understand every system (technological or not) used to conduct operations
- Arrive at an understanding of the dependencies between systems
- Identify inefficient systems and inefficiencies arising from the lack of integration of systems, or arising from incomplete or low quality (slow, cumbersome, ineffective) integrations between systems
- Document the pain points arising from non-optimal uses of technology
- Arrive at a set of opportunities that, if seized upon, move the organization towards a more optimal use of technology

In addition to the opportunities that will better serve the organization, your technology consultant should keep a focus on improvements to bring the impact of the mission to the community, to measure and communicate impact and close the loop with donors, partners, and those who are served.



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TECH AUDIT SCOPE AND DURATION

For every project my teams have taken on we do some level of auditing and assessment of technology, culture and capacity to understand and define the scope (and risks) of the project. With some clients simply understanding the impact of implementing a new content management system (CMS) is warranted, at the other end of the scale it may involve months of work interviewing dozens of key players and studying 10 or more distinct systems to determine where efficiencies can be gained including upgrades or purchasing of software or hardware, or somewhere in between these extremes. In all cases our approach and goals as described above are the same.

The scope and duration of a Technology Audit are determined by:

- **The # of systems** – how many points of data input and output need to be studied and mapped; what is the quality of that data
- **The # of interviews needed** – how many people interact with these systems; how complex is the culture; what is the availability of staff for interviews
- **The severity and depth of the challenges the client needs to have solved** – what are the dependencies on the processes; have staff been historically change averse; are there any sacred cows that have impeded progress; what are the budget limitations

RECOMMENDATIONS

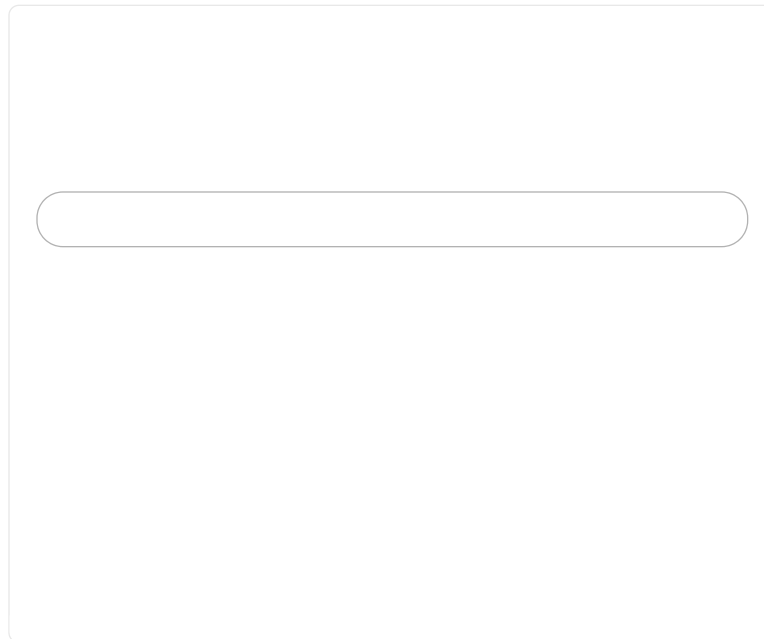
Once it is understood what systems and data are in use, the needs and gaps, and the culture of an organization your technology consultant can begin creating

their Recommendations.

- Analysis – study the findings, assess the organization's priorities, where the largest needs and gaps have occurred, how the culture of the organization has impeded or embraced progress
- Research – determine what tools or services may be best to implement or upgrade that will support the mission and vision, and capacities of the organization
- Recommendations – aggregate the Audit, Analysis and Research into a Recommendations document that summarizes the conclusions with documentation that supports these conclusions
- Estimates - relative to agreed upon priorities and short and long term needs, generate cost estimates, schedule and implementation plan

CONCLUSION

Understanding your data and the systems managing the input and output of the data, as well as user habits, culture and business processes is extremely important. With proper insight you can make those tough decisions around how to implement new software, hardware and workflow and policies. Hiring the right consultant and performing a thorough Technology Assessment can make all the difference in how you plan your budgets and digital evolution.



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