Idealware's On Demand Tactical Technology Planning

Are you overwhelmed by technology? Relax. Take a deep breath. You've come to the right place.

Idealware's On Demand Tactical Technology Planning will help you out of the technology doldrums and help you assess your organization's technology infrastructure and address your current and future needs. Take the online training at your own pace, and use the associated workbook to help apply what you're learning to your own organization. When you complete the training, You'll have a fully realized tactical technology action plan to guide your nonprofit. With it, you'll be able to solve your current technology issues, and better equipped to tackle future challenges.

Our on-demand training is the only one of its kind, and the latest addition to the extensive library of resources from Idealware. If you work at a small-to-medium nonprofit and have any questions about technology, you need Tactical Tech Planning–you've come to the right place.

Idealware's On Demand Tactical Technology Planning is made up of five units:

- Getting Started
- Infrastructure
- Data
- Online Communications
- Action Plan

Each unit contains between three-and-eight modules on specific topics for a total of 26 modules. The modules are from eight-to-15 minutes in length and designed to be watched "on demand"—on your schedule, at your pace, and on the device of your choice. Course participants are given a workbook to guide them, and each module has a follow-up homework assignment to help you write your own organizational tactical technology plan.

Tactical Tech Planning features a tiered pricing structure for your organization:

- Fewer than 10 staff members: $275
- 10 to 30 staff members: $375
- 30 to 100 staff members: $475
- More than 100 staff members: Contact us

To get your plan and get rolling with Tactical Tech Planning, go to tacticaltech.idealware.org.

The following outlines the chapters and modules you'll explore en route to developing your tactical technology plan.

Getting Started

- Introductions
- Tactical vs. Strategic Planning
- Your Technology Committee

Welcome aboard! In this first chapter, we'll introduce Idealware's trainers, set expectations for the course, and define the terms we'll use throughout. As you move through this introductory chapter, you'll start to build the foundation for your tactical technology plan—including how to build the team you'll need to help you implement your own plan at your organization.

This course will move you toward a finished tactical technology plan, but in order to ensure you complete that plan, you need to do your homework. Literally. Following each module, you will be asked to complete a homework assignment–some are critical to writing your plan, others are optional. In order to to complete your homework, you will need the course workbook and planning document.

Introductions
Welcome to the Idealware's On Demand Tactical Technology Planning. What exactly are you getting into? In this module, we'll walk you through the structure of the entire course: the video modules, trainer introductions, time management, and your tactical technology plan. Let's get to it…

Tactical vs. Strategic Planning
Why did we call this course Tactical Planning rather than Strategic? We chose the name carefully to define a process that highlights your technology deficiencies and the areas of improvement that provide the most bang-for-the-buck. We'll explain exactly what "Tactical Planning" means to us and for you.

Your Technology Committee
You shouldn't go through this process alone–organizing a committee is vital. It provides you with different perspectives on your organization's priorities, allows you double-check your thinking, and builds consensus around your next steps. In this module, we will talk about your committee's make-up, tasks, and the time commitment for its members—all the information you need to recruit.

Infrastructure

- The Hardware Safari
- Computers
- Phones & Printers
- Networking
- File Sharing & Backup
- Software Infrastructure
- Supporting Technology
- The Technology Plan
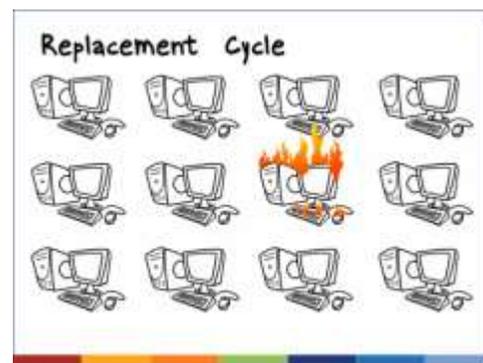
It's time for a journey through your technology infrastructure. Don't worry—there's nothing to be afraid of. We'll take a step-by-step look at each of the critical pieces of your entire technology package. By the end, you'll have an understanding of how to assess each piece of your technology infrastructure and plan for the future.

The Hardware Safari

Before we can discuss the hardware you should be using, it's important to understand what you are using. What computers, printers, phones, servers, and networking equipment are you using? How old is it? Learn how to undertake your own "hardware safari" in your offices and technology closets to seek out and identify hardware needs.

Computers

What are the important considerations to ensure you are using—or buying—the right computers? We'll discuss what you need to know and outline a computer budgeting cycle to demystify the computer buying process.

Phones & Printers

While it's clear when your phones and printers are working well for you, it's often less clear how to resolve issues when they are not. We'll begin with a look at printers and then delve into the often mysterious world of phone systems to ensure your system works for you.

Networking

Networking—internet connectivity, firewalls, routers, servers, and more—can seem scary at first, but armed with the right knowledge, it's not that complicated. We'll break down each of the components and talk about how they can work together to benefit your organization.

File Sharing & Backup

Regardless of your organization's size, you need to share files: among staff members, remote team members, or multiple offices. And, if disaster strikes, you need to back up your files to be certain they're not permanently lost. We'll outline the options to help you determine the best methods for your organization.

Software Infrastructure

Is your staff wasting significant time each day dealing with word processing, spreadsheets, email, calendars, or other software problems? You need your staff to maximize their time. We'll point out the basic software packages that every organization should be using, and how to make the most of each.

Supporting Technology

Your hardware and software infrastructure needs support. Should you keep that responsibility in-house? Should you bring on a consultant? Or, should you outsource all of it to a firm? This module outlines the pros and cons of each approach.

The Technology Plan

Congratulations, you've made it through the first set of strategic considerations: hardware and software infrastructure. Now, it's time to brainstorm with your committee and start writing your plan.

Data

- Considering Your Constituents
- Which Types of Tools to Use?
- How to Track Other Data
- Data Maintenance
- Measurement

A major component of your technology planning will be centered around data. What data do you collect? How do you collect it? How do you maintain it? How do you measure it? With a sound infrastructure in place, it's time to tackle these questions. This chapter will help you understand the major considerations around data and how you can answer them to move your organization forward.
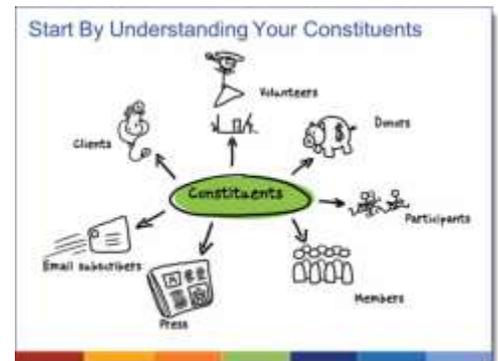
Considering Your Constituents

You have donors, clients, volunteers, the media and other groups to track. That's a lot of data. What information do you need to make the most of your relationships? Thinking strategically about constituent data, we'll look at a framework to track and maximize it.

Which Types of Tools to Use?

Should you be using a single system or multiple systems to track your constituent data? What types of systems are available? We'll review the differences between a Constituent Relationship Management System, a Donor Management System, a Member Management System, a Client Management System, and an Integrated Online System to help you select the right type for your data needs.

How to Track Other Data

Along with constituent data, your organization may need to track other data, such as accounting or human resources data. Additionally, you may need a system tailored to a particular type of nonprofit if you manage a museum or library, for example. What system will work best for your organization?

Data Maintenance

Unfortunately, your databases won't manage themselves–leave your data alone and watch how messy and unusable it becomes. In order to maximize your data, you need processes to manage and clean it. We'll discuss what to consider.

Measurement

You're collecting and tracking your data, but how do you measure it? For that matter, what do you want to measure? Your data can measure your organizational health and the success of your programs, so it's important to define your metrics. Finally, we'll define how you can use the metrics in the decision-making process.

Online Communications

- Communications Goals
- Websites
- Email
- Social Media
- Integrated Communications

With the back of the house in order, it's time to reach out to your audiences. Using technology to deliver your messages is essential. Your website, emails, and social media conversations all shape your relationship with your clients, members, donors, and everyone else interested in your organizations. With a firm grasp of the technology, you can master these interactions.
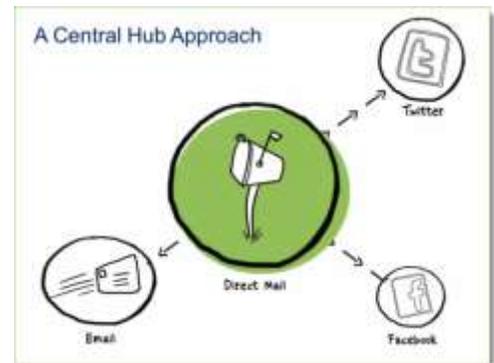
Communications Goals

All successful communications start by defining the goals and the audience to reach. Online communications are no different. This module provides an overview of the "SMART" goals process to ensure that each communication method works for your organization.

Websites

You never get a second chance to make a first impression. What kind of first impression does your website make? Maximize this opportunity by balancing the information most important to your audiences with the messages you want to deliver. This module outlines best practices for websites and reviews the technologies your staff can use to manage and update your website.

Email

Broadcast email provides an unparalleled bang-for-the-buck for engaging your audience and moving them to take action, but the details are critical. In this module, you'll learn how to write a successful email—one people will read and react to. Then, we'll look at the tools for creating and sending your emails and managing your email list.

Social Media

Facebook, Twitter, Blogger, YouTube… the list goes on and on, but which of the social media channels really makes sense for a nonprofit with limited time and resources? Using real research and industry best practices, we'll outline which tools can best help you reach your organizational goals.

Integrated Communications

With so many communication options, how do you ensure you're using the right tools for your organization? Moreover, how do you maintain consistency of message across channels? We'll propose frameworks to help you determine if your efforts are rowing together in the same direction.

Action Plan

- Prioritizing Projects
- Understanding Technology Projects
- Creating Your Action Plan
- Funding Your Technology
- Implementing Your Plan

The pieces of the puzzle are in place, and it's time to put your plan together. What are your priorities? How do you fund them? The course may be coming to a close, but the work is far from over—with your tactical technology plan at your fingertips, you're ready to put it into action. We'll show you how.

Prioritizing Projects

You now have a whopping list of potential projects that could help your organization. How do you prioritize? Which projects will provide the most bang-for-the-buck for your organization? In this module, we'll help you narrow down the projects to develop a technology project shortlist.

Understanding Technology Projects

From design to planning to project implementation, we'll walk through the nine steps of successful technology projects to help your organization be able to plan and budget for a typical technology project.

Creating Your Action Plan

Now that you understand a typical technology project, we'll apply that knowledge to your highest priority projects for the purposes of budgeting and scheduling so you can have clear expectations for your own work.

Funding Your Technology

You've defined what you'd like to do—now you just need the funding. From working with local businesses and volunteers to approaching existing partner foundations to considering major donors, we'll look at the variety of models for funding your projects.

Implementing Your Plan

Congratulations! You've completed the course. You never have to think about technology again, right? Not so fast. In closing, we'll show you how to successfully implement your plan. Once you're on your own, we'll point you to the organizations that can keep you current on new technology tips and trends.

Complete details and purchasing information available at tacticaltech.idealware.org.