DEVELOPING YOUR DIGITAL ROADMAP

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April 2018

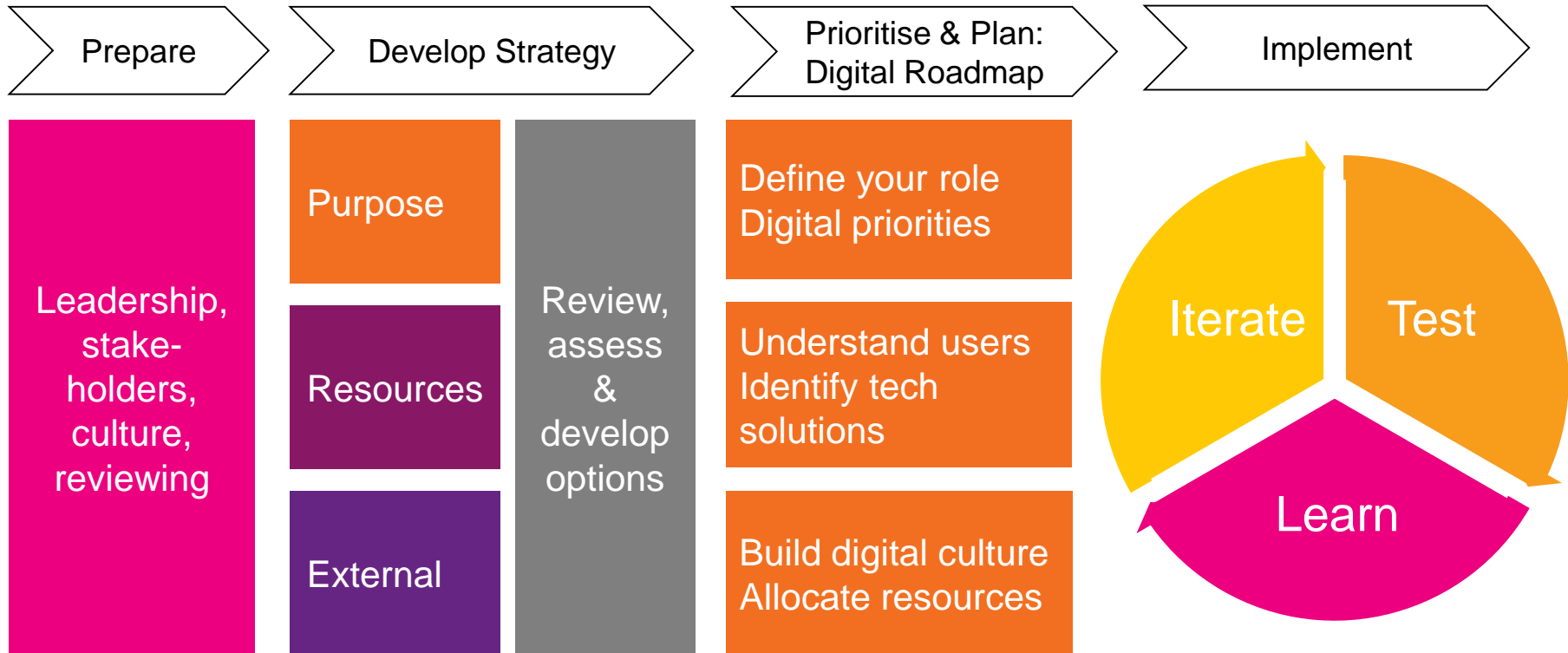# MANY CHARITIES ARE PREPARING FOR DIGITAL TRANSFORMATION

Most charities struggle to work out where to start:

- Develop a digital strategy to identify priorities and develop plans?

- Understand user needs & priorities to identify priorities?

- Build a digital culture and develop staff & board skills?

- Start experimenting and learn by doing?

All four are essential: *'Strategy is not what you write down, its what you do and deliver'*
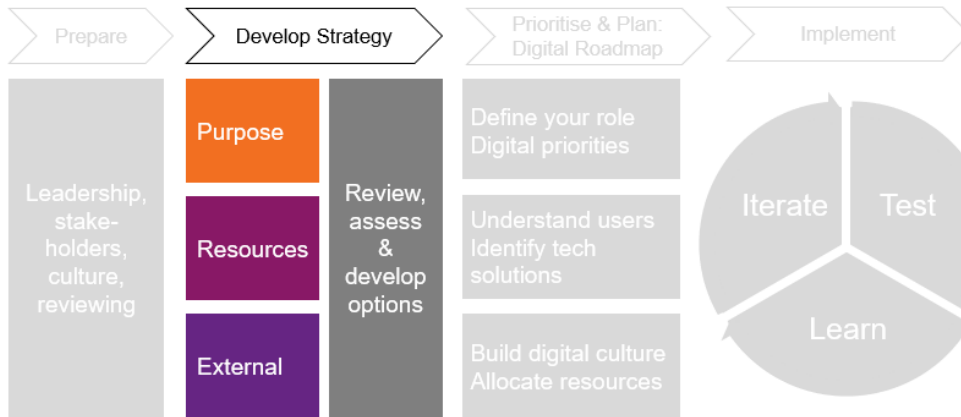
Tom Loosemore, Deputy Director Government Digital Service

NPC'S APPROACH TO DEVELOPING & IMPLEMENTING A DIGITAL STRATEGY

NPC

Prepare	Develop Strategy	Prioritise & Plan: Digital Roadmap	Implement

Leadership, stake-holders, culture, reviewing

Purpose

Resources

External

Review, assess & develop options

Define your role
Digital priorities

Understand users
Identify tech solutions

Build digital culture
Allocate resources

Iterate

Test

Learn
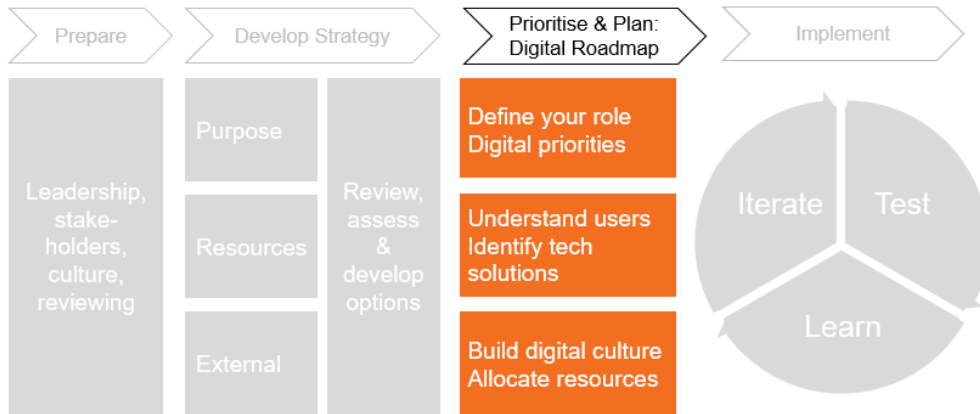
EXISTING STRATEGY

Rapid Review

RAPID REVIEW OF STRATEGY

Brief review, based on conversations with board and senior management team, and review of strategy documentation:

- Identifies any outstanding issues or questions that would influence development of digital strategy and digital products against:

  – Charitable purpose—vision, mission, goals

  – Resources—financial plans, fundraising plans, staffing

  – External factors—context, landscape/market, socio-political

PRIORITISE & PLAN

Digital Roadmap

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DEFINE YOUR ROLE & SET DIGITAL PRIORITIES

Existing strategy sets priorities for activities & services:

- Digital can help deliver existing strategy

- Digital can also create new possibilities beyond existing strategy

Digital strategy needs to build on core principles:

- Augmenting, not replacing, best of your existing services

- Building on and aligning with how staff and partners work best

- Scaling up to reach greater proportion of need

Digital can transform your work and impact, but only if it complements rather than compromises existing work & culture.

UNDERSTAND USERS & IDENTIFY TECH SOLUTIONS

Strategies tend to be developed top-down and imposed on the world. Successful digital strategies blend top-down planning with bottom-up understanding of reality of users' needs and experience:

- Identify key user groups

  - Service users/beneficiaries

  - Key partners & those you rely on for services to work

- Segment users based on demographics, behaviours & tech usage

- Develop personas for key user types

- Develop user journeys based on their real experience

Digital technology projects fail if they don't build on actual user experience—so the only effective approach is to test and learn.
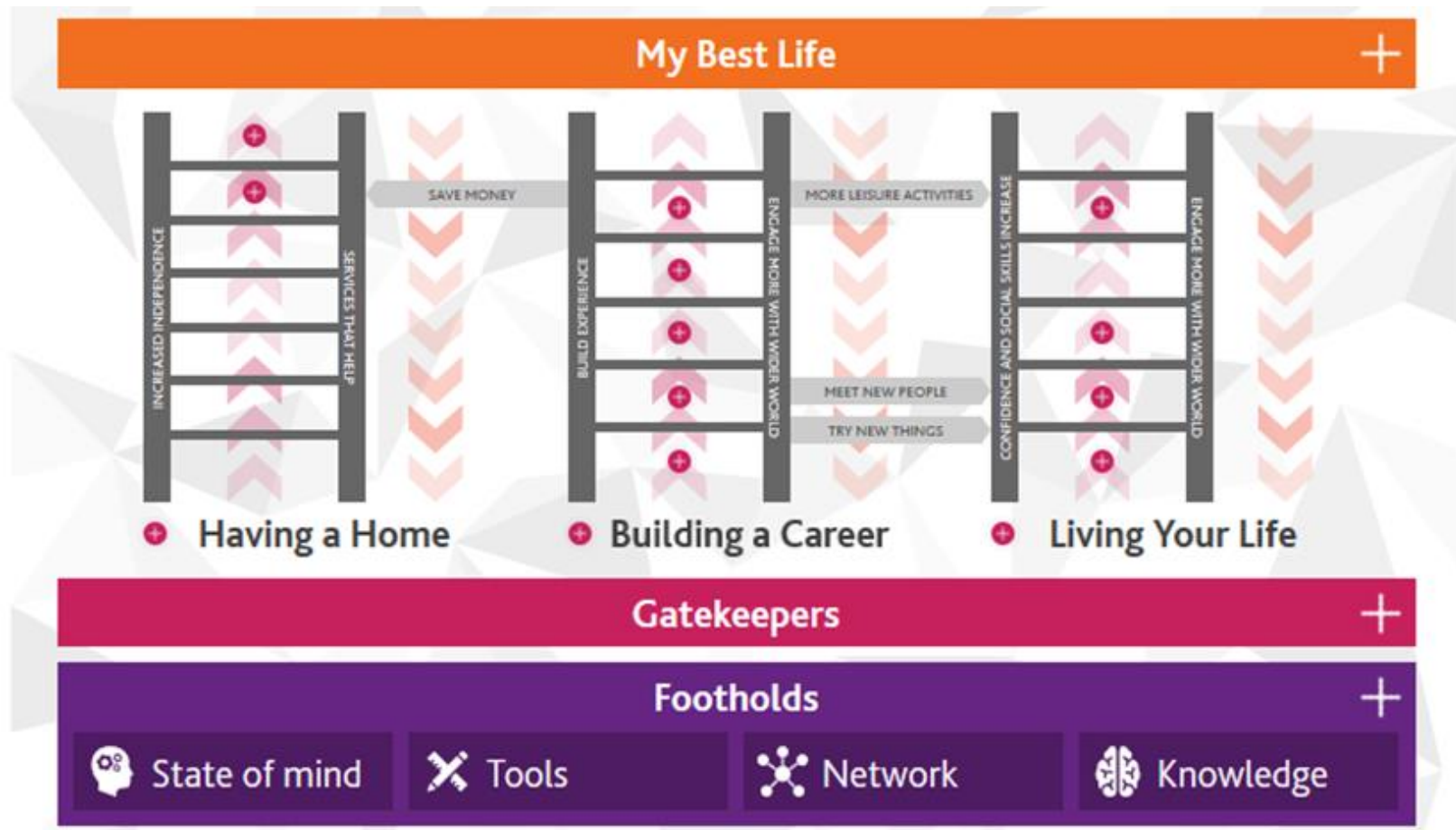
WHAT MIGHT A PERSONA COVER?

DIY **1** **7**

PERSONAS

I want to know the people I'm working with
by visualising their key characteristics

	WHO AM I?	3 REASONS FOR ME TO ENGAGE WITH YOU	3 REASONS FOR ME NOT TO ENGAGE WITH YOU
ADD PICTURE OR DRAWING		1.	1.
		2.	2.
PERSONA NAME:		3.	3.
AUDIENCE SEGMENT:			

MY INTERESTS	MY PERSONALITY	MY SKILLS	MY DREAMS	MY SOCIAL ENVIRONMENT

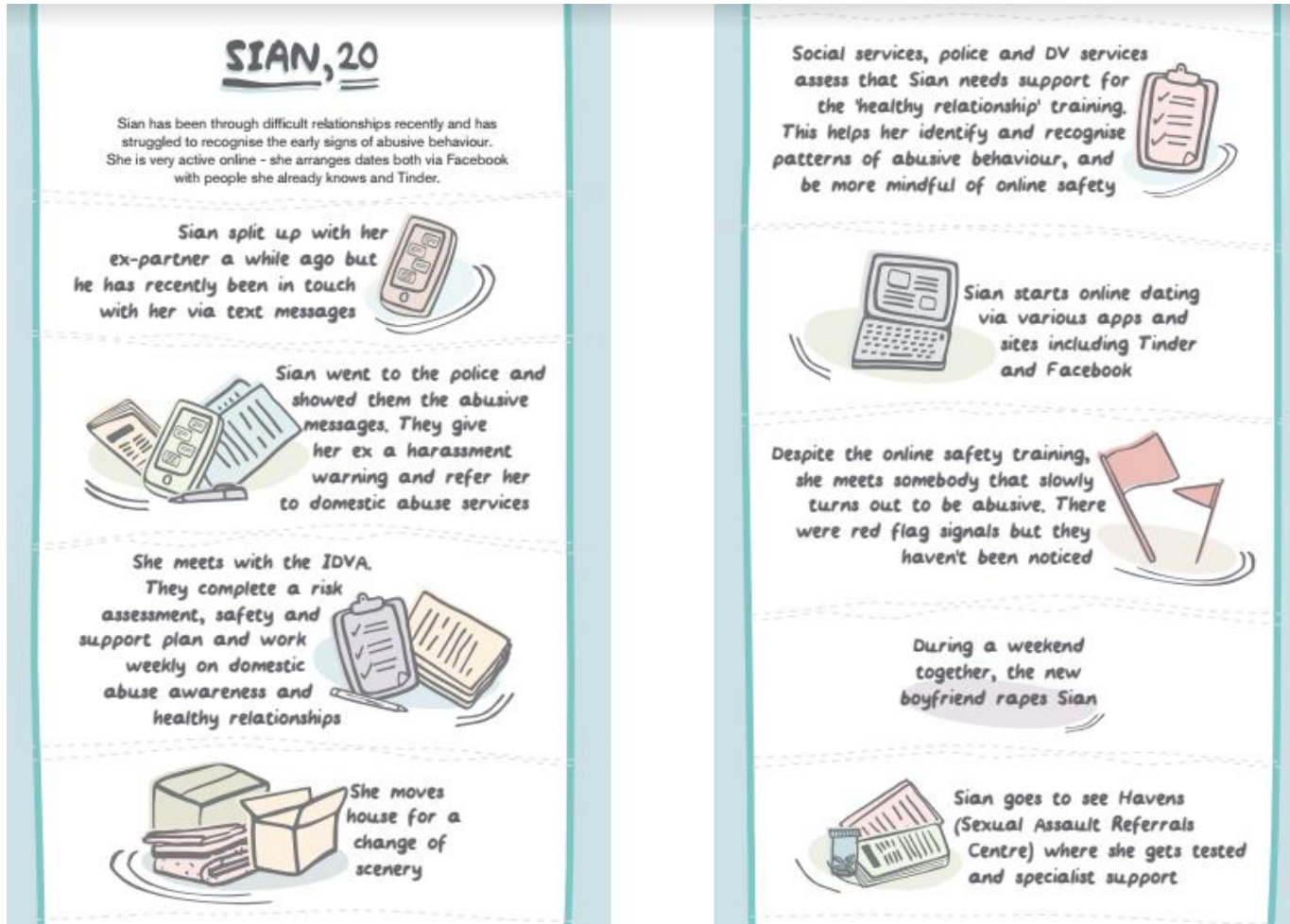http://diytoolkit.org/tools/personas/

WHAT MIGHT A USER JOURNEY LOOK LIKE?

eg, tech for young people experiencing multiple disadvantage

WHAT MIGHT A USER JOURNEY LOOK LIKE?

eg, tech in context of domestic violence

SIAN, 20

Sian has been through difficult relationships recently and has struggled to recognise the early signs of abusive behaviour. She is very active online - she arranges dates both via Facebook with people she already knows and Tinder.

Sian split up with her ex-partner a while ago but he has recently been in touch with her via text messages

Sian went to the police and showed them the abusive messages. They give her ex a harassment warning and refer her to domestic abuse services

She meets with the IDVA. They complete a risk assessment, safety and support plan and work weekly on domestic abuse awareness and healthy relationships

She moves house for a change of scenery

Social services, police and DV services assess that Sian needs support for the 'healthy relationship' training. This helps her identify and recognise patterns of abusive behaviour, and be more mindful of online safety

Sian starts online dating via various apps and sites including Tinder and Facebook

Despite the online safety training, she meets somebody that slowly turns out to be abusive. There were red flag signals but they haven't been noticed

During a weekend together, the new boyfriend rapes Sian

Sian goes to see Havens (Sexual Assault Referrals Centre) where she gets tested and specialist support

https://www.techvsabuse.info/

IDEAS FOR TECH SOLUTIONS SHOULD BUILD ON USER RESEARCH

Discover   Define   Develop   Deliver

problem definition
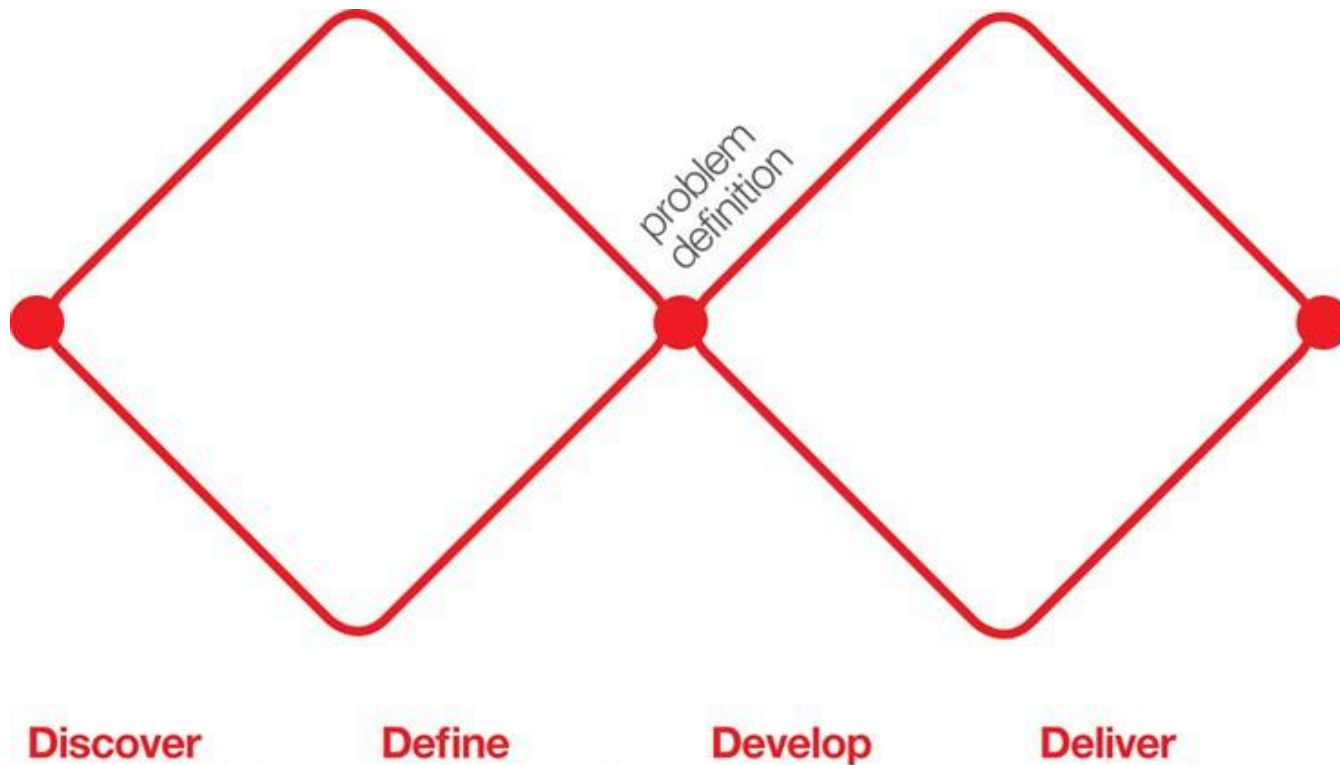
User research, personas and journeys will help prioritise these and other ideas: What are users' real pain points? What will they really use?
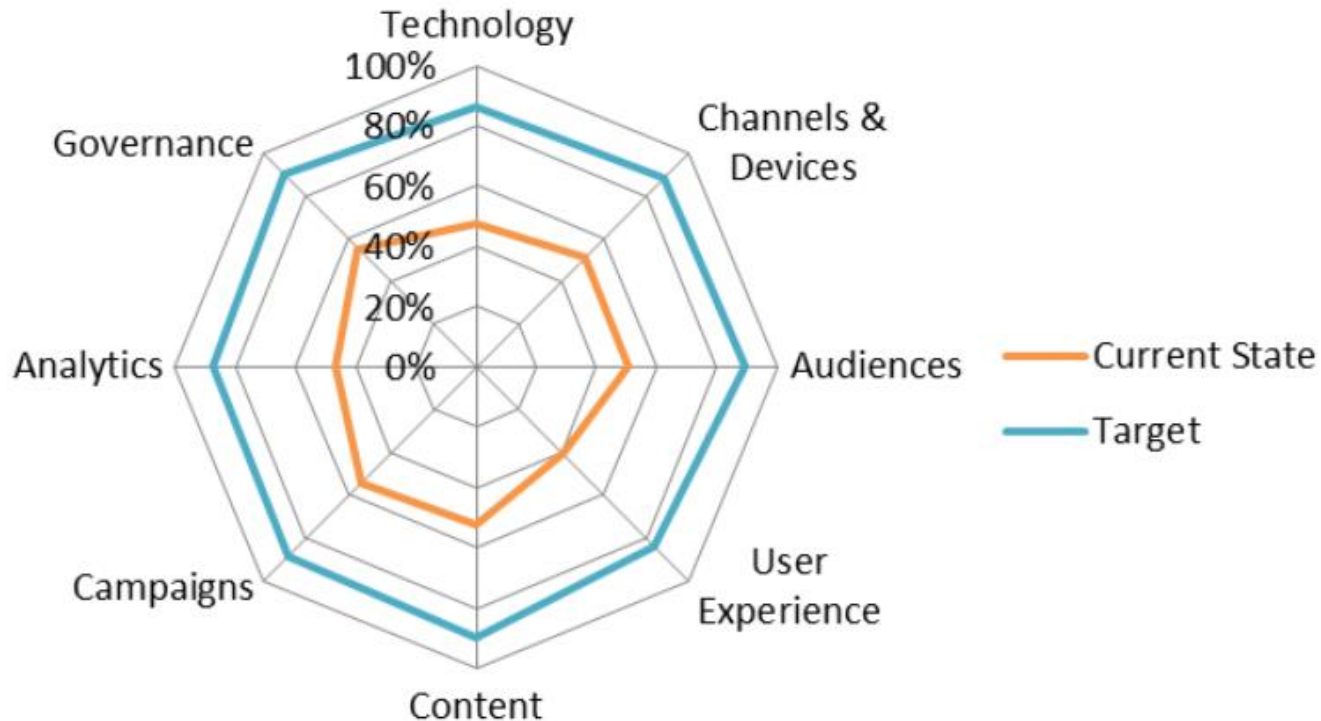
BUILD DIGITAL CULTURE & ALLOCATE RESOURCES

Strategy and user insight are crucial for digital development, but without the culture to support embracing digital, failure is unavoidable:

- Digital leadership training/coaching for board & senior management

  - Not about how to code, but what digital can do, and how to lead digital transformation in your organisation

- Assessing digital maturity across organisation

  - Digital Maturity Matrix in common use across charity sector

  - Skills audit to identify training & development needs

- Developing ways of working to support agile approach

Digital transformation is nothing new—it's just change management with technology as the focus.

DIGITAL MATURITY MATRIX

- All staff & board assess current state and their desired target state

- Open discussion around differences of perspective, and challenges

BUILD DIGITAL CULTURE & ALLOCATE RESOURCES

Resource planning essential to successful development & adoption of tech solutions:

- Digital in service delivery: essential to mission, but require investment up front and ongoing maintenance & development cost

- Digital in internal operations: increase efficiency, but require investment up front and payback period to realise savings

- Digital in fundraising: increase revenues, but require investment up front and payback period to realise increased revenue

Investment will be required up front—balance investments across these priorities and stagger over time to manage capital requirement.

IMPLEMENT

Leadership, stake-holders, culture, reviewing	Purpose	Review, assess & develop options	Define your role Digital priorities
	Resources		Understand users Identify tech solutions
	External		Build digital culture Allocate resources

Iterate

Test

Learn

IMPLEMENTATION CAN'T START UNTIL ROADMAP IN PLACE, BUT CAN PLAN

- What must be done in house?

  - Is it core to the mission?

  - Is it a core competence of the staff?

  - Is it more efficient and effective to develop in house skills than outsource?

- Some tasks need to be in house if they're core

  - eg, user research

    - Training for staff in how to develop personas & user journeys

    - Consultancy to bring design experience and manage UX development

  - eg, content

- While digital development may be outsourced

  - Design & build on tech solutions delivered by agency

    - Working in integrated team with in house staff to enable agile development

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