

# Build an Information Strategy for Your Organization

**Unlock the Potential in Technology and Data**



## WHY IS THIS IMPORTANT?

**Technology-driven information management plays an ever-increasing role in helping nonprofits understand the world around them—and their impact on it.**

Accordingly, nonprofits want to know if technology is available to help them succeed at a higher level. The answer to this question is almost always “Yes, there is a technology solution.” But how can a nonprofit get a return on investment that justifies the time and dollars expended? That’s a different question entirely.

**Our experience is that nonprofits often struggle to successfully implement technological change.**

A large percentage of technology projects fail to achieve their goals, and many fail outright. This failure is due to lack of information management capacity in one or more critical areas.

**Your organization can build the capacity to successfully select and implement game-changing technologies.**

Creating a good information strategy is the key to building this capacity within your organization. An information strategy defines the path that the organization must travel in order to improve in information management leadership/governance, operations, process, data, and technology.

**This whitepaper provides critical insight derived from our partners’ decades of experience.**

We hope that this information strategy whitepaper helps your organization get started on building the capacity to achieve maximum return from your technology investments.

## CONTENTS

Why Is This Important?.....	2
The Need for Capacity Development.....	4
What Is an “Information Strategy”?.....	5
The Build Information Strategy Framework™.....	6
Building Capacity Using the Framework.....	7
Is an Information Strategy Right for My Organization?.....	8
When Does Building an Information Strategy Start?.....	9
Want More Information?.....	10
About Build Consulting.....	10

## THE NEED FOR CAPACITY DEVELOPMENT

Build Consulting's experience with nonprofits points to a large gap between the need for effective information management and the capacity to achieve it.

This manifests itself in a variety of different ways, but ultimately the result is that process, data, and technology are to some degree disconnected from the needs of the organization.

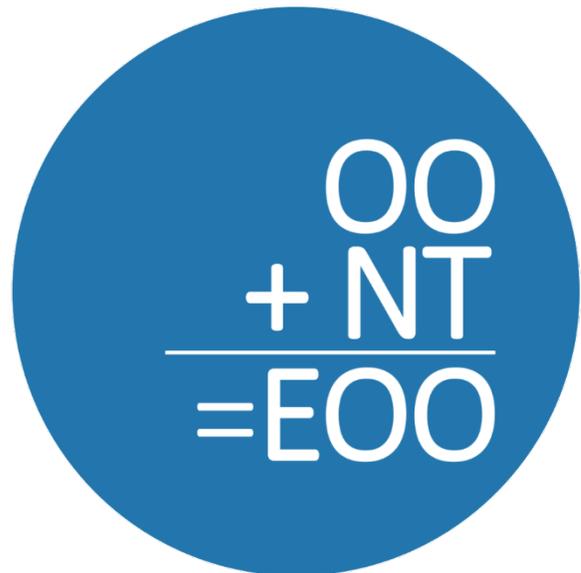
Lacking information management capacity, many nonprofits view technology as a sort of cure-all. This is most commonly voiced as "we will have better data quality if we adopt new technology" or "we will have better processes if we buy a better product."

Approaching the technology market (whose goal is to sell you technology) with this perspective is a recipe for unmet expectations at a high cost.

We often present this formula to our clients:  $OO + NT = EOO$  (Old Organization + New Technology = Expensive Old Organization)

Taking advantage of modern information systems requires solid information management leadership/governance, operations, processes, and data. Achieving this requires some degree of organizational change.

Yes, technology plays a strong supporting role in data quality and process automation. But technology will not define your process or data requirements. Technology is just one part of the solution, albeit a critical part. And as we will see, it is the last in a sequence of five factors that must be addressed for information management success.



## WHAT IS AN “INFORMATION STRATEGY”?

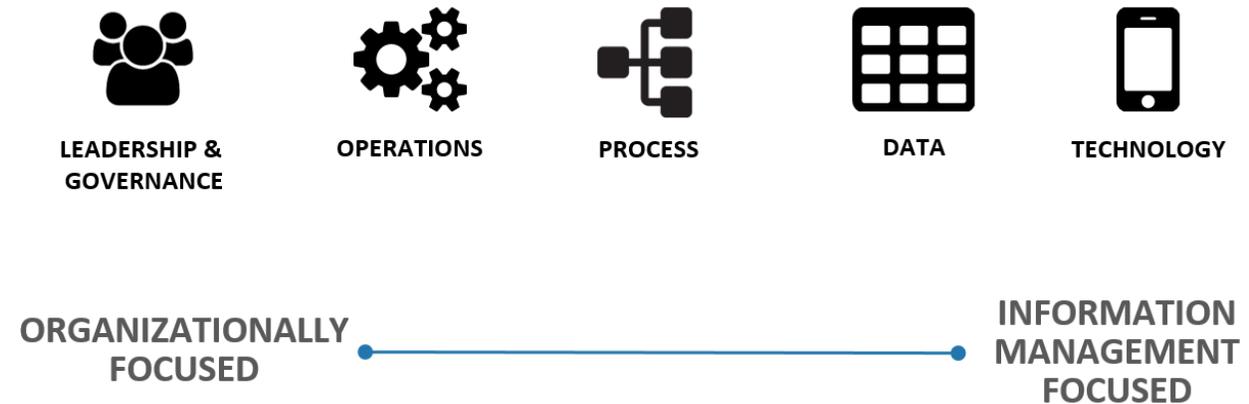


Figure 1, Information Strategy Framework

**An information strategy defines the path that the organization must travel in order to have information management success.**

As such, it takes a holistic approach in helping the organization increase its information management capacity. Using the *Build Information Strategy Framework*<sup>™</sup>, the execution of a properly constructed information strategy considers leadership/governance, operations, process, data, and technology.

The five components of an information strategy (shown above in Figure 1)—which roots information management in organizational strength—are all necessary to ensure your organization enjoys maximum success in the practice of information management and return on its technology investment.

### Each strategy is unique to the organization.

The information strategy framework provides best-practice-based means for approaching every nonprofit as a unique entity, with its own unique challenges.

Accordingly, the framework doesn't come loaded with preconceived notions about what technology is best for each organization. Nor does it apply sweeping generalizations about what information management policies and practices will be best for each.

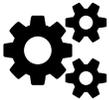
Properly applying the framework is both an art and a science. It combines an understanding of the organization—including its people and their behaviors—with a variety of interrelated technical disciplines.

## THE BUILD INFORMATION STRATEGY FRAMEWORK™

Let's start our consideration of the information strategy framework by asking a high-level question about each of the major components.



**Governance: Is there clarity of vision, alignment, and engagement that sets the stage for successful information management?** Does leadership have a clear vision for how information management supports organizational outcomes? Are all leaders on the same page regarding policy? Are all leaders engaged with driving the information management process?



**Operations: How will information management be resourced, managed, and communicated?** What resources will be available to support information management operations? Who will manage those resources? How will the information strategy and supporting tactics be communicated throughout the organization?



**Process: What are the processes by which the organization performs its work?** Does the organization have clearly defined and documented processes by which it performs necessary activities? Who are the people engaged in these processes and what are their roles?



**Data: What data is managed as a part of the business process?** What must the data describe? How will we know when the data is complete, valid, and accurate? How will we maintain data consistency over time? Who is using the data and how timely must data delivery be to those users?



**Technology: What technologies will best support the business process and data?** How well do available systems (and their vendors) match the business requirements? How will these technologies evolve over time? What new technologies are emerging? What is the total cost of ownership relative to return on investment?

A successful information strategy will seek to ask and answer these questions for the organization, building on strengths to address challenges.

## BUILDING CAPACITY USING THE FRAMEWORK

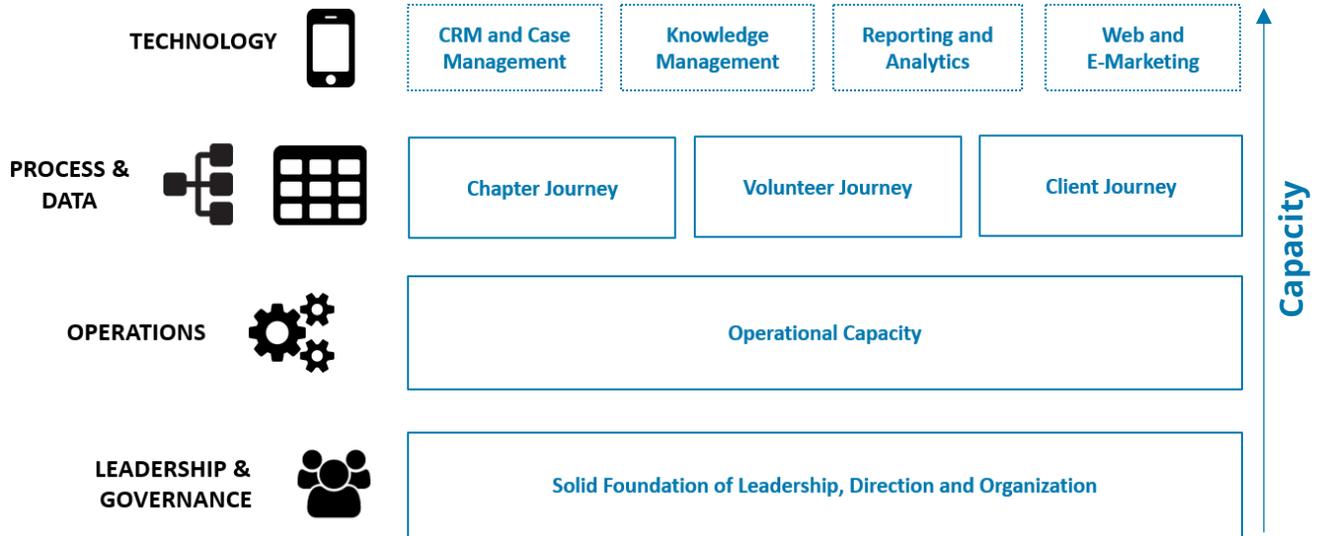


Figure 2, Sample Information Strategy "Stack"

Figure 2 provides an example of how capacity is developed by applying the *Build Information Strategy Framework*. This visual was created for a national chapter-based, volunteer organization with more than 10,000 active volunteers directly serving hundreds of thousands of clients annually.

In this example, process and data requirements are organized around three primary "constituent journeys" (chapter, volunteer, client), and the primary technology systems are divided into major functional buckets aligned to the organization's process and data needs.

This illustrates that applying information strategy creates or strengthens building blocks from the foundation up. By the time the topmost block is laid, the organization has increased its capacity to the point where it is ready to successfully leverage its technology.

## IS AN INFORMATION STRATEGY RIGHT FOR MY ORGANIZATION?

A formal information strategy is appropriate to every nonprofit. The scope of such a strategy would vary according to the size and complexity of the organization. However, below is a checklist of common client challenges that can indicate the range of benefits offered by an integrated information strategy to your organization. How many of these descriptive statements apply in some way to your organization?

### Governance

- Lack of clear vision or strategic framework for how technology should empower the organization to meet constituent needs
- Departments, teams, and individuals working on technology solutions in silos, with no overall plan or guidance
- Organization reluctant to change in response to new processes or technologies

### Operations

- Technology management approach resulting in multiple disconnected projects
- Technology support insufficient to meet the organization's challenges
- Inconsistent technology communication and training

### Data

- Insufficiently documented data model
- Missing or inconsistent data
- Difficulties producing accurate, consistent reports from data

### Process

- Lack of well designed, agreed upon, and documented processes
- Conflicting or non-standard processes across departments
- Lack of ongoing process evolution as the organization changes

### Technology

- Lack of elegant and intuitive tools to support constituent journeys
- Software that no longer meets business needs
- Poor reporting and analytics tools
- Inadequate integration of systems
- Inadequate mobile experience

- ❑ Outdated technology

## WHEN DOES BUILDING AN INFORMATION STRATEGY START?

In an ideal scenario, creating an information strategy would best be performed as its own project. But as long as the organization's leadership buys into the framework and the outcomes it intends to produce, information strategies can be built within one or more ongoing technology projects. This is done by applying additional strategic vision and structure—building out the information strategy framework as the project(s) move forward.

In addition to stand-alone information strategy development projects, Build Consulting has successfully leveraged its information strategy framework within many types of engagements, including:

- Information system (software) assessments and selections
- Information system implementations
- Data management assessments
- IT assessment and roadmap
- Business process/requirements documentation
- CIO (Chief Information Officer) services
- Outsourced CRM data management

## WANT MORE INFORMATION?

We want to make information strategy an approachable subject for your organization. If you have any questions or comments, please do not hesitate to contact us!

Build Consulting

<https://buildconsulting.com/contact>

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## ABOUT BUILD CONSULTING

Build Consulting was created to help nonprofits like yours reach their goals. We are inspired by nonprofits who are driven to transform themselves and, ultimately, the world!

We have a passion for leveraging data and technology to improve nonprofit organizations. Nonprofit technology projects fail at a rate of over 50%. Build Consulting is on a mission to change that. We view technology change as organizational change.

Build Consulting has extensive experience transforming nonprofit organizations. We marry deep data and information technology experience with an on-the-ground knowledge of the daily realities of life at a nonprofit.

Because of our experience, we understand your unique challenges... and can ground your organization in what is needed to get the most from your investments.