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You’ve worked hard to get to this place. Weeks or months of research, conversations with colleagues, and careful thought have all sharpened your focus on a technology solution that will make a big difference for your organization and the community it serves.

You’re excited. Maybe others are excited too. But there’s still a big hurdle ahead: You need a few decisionmakers—funders, board members, executive staff, or colleagues—to say yes to your tech.

This hurdle can be high in the nonprofit world, especially if the project costs money. There’s a strong scarcity mindset across the sector that limits our ability to improve operations. We’re told that we all need to run harder because the resources we need to do our best work—money, time, and tools—will never be available. The operating principle is “more with less.”

Arguably, that mindset shows up most strongly when it comes to technology. Nonprofit leaders tend not to want to invest in new technology because it’s not always obvious how an updated system or new tool will benefit constituents or increase impact. Tech is often seen as extra—overhead that takes dollars away from more vital needs. Even when there are no dollar costs associated with the project, leaders are reluctant to add new technology out of a fear that hidden costs or new headaches will emerge.

Cost concerns and a general skepticism about the benefits of new technology are valid. Those who have worked in the nonprofit sector for a decade or more are probably too familiar with the pain of being stuck with technology that costs more than expected and delivers less.

There’s a strong scarcity mindset across the sector that limits our ability to improve operations. ... The good news is that you can start to change it with proposals that challenge colleagues and leaders to see the real value technology can deliver.

However, the scarcity mindset often validates inefficiency, frustration, and limited impact as normal and makes it harder for decisionmakers to imagine a better way. We expect less from our technology, so it delivers less, and we continue to see stalled progress and low morale.

If you’re reading this, you probably run up against this scarcity mindset frequently. It’s not the only hurdle you might face, either. For example, maybe staff members within your own nonprofit are divided about how innovative your organization should be—maybe your communications team wants to push the boundaries while the finance team favors caution.

The good news is that a strong proposal can challenge colleagues and leaders to see the real value technology can deliver. We want to help you build that winning proposal.
We created this resource to help you zero in on the most compelling arguments for new technology, and to give you the tools you need to develop a pitch to convince funders, board members, executive staff, and peers to get behind this needed change.

It includes worksheets that will help you gather information about your technology needs; identify key audience members; outline and prioritize the benefits of your proposed technology; connect your project to your organization’s mission; calculate the Return On Investment (ROI) of your new technology; and map out your process in a way that shows decisionmakers that you’ve put a lot of thought into your project and have a plan for its success.

We’ve also created a companion PowerPoint deck template with slides that correspond to each worksheet and tips to help you knock that pitch presentation out of the park. You can download the deck for free, customize it with your brand logo and colors, and build it out to meet your own needs.

If you haven’t already, download the deck template at https://offers.techimpact.org/reports/pitch_kit.
WORKSHEET 1: The Technology You’re Proposing

In this section, you’ll clarify the technology solution you’d like to propose and begin articulating why it is the right technology to pursue.

What’s wrong with your current process or technology?
List pain points, limitations, inefficiencies, or other ways existing tech holds your organization back.

1. 
2. 
3. 
4. 
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7. 

What are your goals for new technology?
List the main things you need your new technology to be able to do.

1. 
2. 
3. 
4. 
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7. 

“The first thing is to have a clear idea of what it is you want to do.”

—Dan Callahan, CGNet
Do you already have a technology solution in mind?
If so, describe it in 50 words or fewer. See if you can describe it in a way that anyone can understand.


Are there other solutions that provide similar capabilities?
If yes, list them below and explain why you decided against these options. (These can be other types of technology or manual processes that do not require new technology.)

<table>
<thead>
<tr>
<th>Technology or Process</th>
<th>Argument Against It*</th>
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*If you find that your reasons for not choosing an alternative are not very compelling, consider looking again at whether the technology you wish to propose makes sense for your organization.

How much do you know about the technology you’re proposing?
Briefly describe your knowledge of or experience working with the technology you’d like to propose.


How will this technology affect your systems, processes, or workflows?

Think through and briefly describe the potential impact of this new technology on existing systems and processes.

__________________________________________

__________________________________________

__________________________________________

How confident are you that you can explain this technology to others?

Determine your level of confidence on a scale of 1-10, with 10 being “Very confident.”

Confidence Level: __________________________

If you’re not very confident in your knowledge of the technology you’re proposing, talk to an expert early in the process. Many consultants will help you assess your technology needs and work with you to develop a budget for your proposal. If you want an objective recommendation, make sure you’re working with a consultant who doesn’t have a financial interest in promoting a specific vendor or product.

Are peer organizations using a similar technology?

It will be important to be able to point to similar organizations using this technology. If you’re not sure whether peer organizations are also using the technology you’re proposing, take the opportunity to ask around. Those conversations can also help you learn more about the technology, the vendors who provide a particular tool, and the practical realities of working with this new technology.

On the next page, list peer organizations and briefly describe how they use the technology. Aim for a brief synopsis of how long they have been using the technology and how similar they are to your own organization.

“Technology is just the tool. The solution is usually process.”

—Rebecca Shavlik, Shavlik Family Foundation
Section Summary

Look back at your answers to the questions in this worksheet. Are you still certain that this technology project is the right one to pursue right now? It’s common to have more research to do at this early stage—remember, the more research you do now, the stronger position you’ll be in later when you make your pitch or select tools.
To make an effective pitch, it's important to recognize who your audience is and what different groups of people care about.

Your Audience

List the people who will use the new technology and who will be most affected by the change. Is it staff, clients, or someone your organization serves? Include anyone who will be affected directly by the technology change. For each, think about how the technology will affect them and how you will convince them that the change will be good for them. (Would it free up time for something else? Would it make them more effective?)

1. 

2. 

3. 

4. 

5. 

Now, list the people who will be important decisionmakers for or against this technology. There may be overlap with the last list, but this might also include executives, program managers, board members, or funders.

1. 

2. 

3. 

4. 

5. 

6. 

7. 

8.
Now list the top concerns for each audience member, and put a star in the last column for anyone who you think might be an ally to support your push for this technology. If you don’t have one or more allies, make some—initiate one-on-one conversations with colleagues, board members, or funders to build support for your idea and help you convince others.

<table>
<thead>
<tr>
<th>Audience Member</th>
<th>Concern</th>
<th>Ally?</th>
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**Section Summary**

Now that you have a clearer picture of your audience and have identified potential allies, you can begin thinking about how you will pitch your project. Do you need to give multiple presentations, each one tailored for a specific audience? You can also begin meeting with potential allies to collaborate on your pitch strategy.
WORKSHEET 3: The Benefits of Your Technology

The most important part of pitching new technology is articulating clearly how what you’re proposing will benefit your organization and the community you serve. Many of these benefits will need to tie to your organization’s mission and impact.

What are the benefits?

List as many benefits of your proposed technology as you can. Benefits you might consider include cost or time savings; additional revenue; new grants; additional capabilities; increased reach; more clients served; improved security; more reliable data; and more.

1. 
2. 
3. 
4. 
5. 
6. 
7. 
8. 
9. 
10. 

“Boards don’t always understand how important technology is because they want immediate impact. That’s why you need to articulate how an upgrade will improve service and advance the mission.”

—Robert Hybben, Butler Family Foundation
Are these benefits real?

Explain how you think this technology will help you achieve each benefit you listed on the previous page. Be as specific as you can about how the features or capabilities of the technology deliver the benefits you’ve listed.

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Rationale</th>
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Circle the benefits you think have the strongest rationale to support them.

Match the benefits to your mission or strategic plan.

For each benefit listed, find a sentence from your mission statement or strategic plan that you think the benefit addresses. If you cannot match a benefit to a larger goal or purpose, that benefit may still be valid, but it should not be presented as a primary benefit.

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<thead>
<tr>
<th>Benefit</th>
<th>Organization Statement</th>
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Circle the benefits that you think offer the most compelling connections to your mission.
Match the benefits to your audience.

For each benefit, rank audience members from the last worksheet by how important you think the benefit will be to them.

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Audience 1</th>
<th>Audience 2</th>
<th>Audience 3</th>
<th>Audience 4</th>
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These rankings will help you tailor the benefits in your presentation to your audience.

Prioritize your benefits.

Now let’s bring all of the elements together. Based on the work you’ve done above, prioritize your benefits based on the strength of your rationale, how the benefits connect to your mission, and the overall receptiveness of your audiences.

1. 

2. 

3. 

4. 

5. 

6. 

7. 

8.
What About the Risks?

Are there risks associated with adopting this technology? How about risks for *not* adopting it? Knowing the risks and being able to address and mitigate them can help make a pitch (and the project itself) more successful.

Now that your benefits are clear to you and you have a sense of how to prioritize them, let's look at how those benefits compare to the costs of your project.
WORKSHEET 4: Return On Investment

Is your technology project worth the time and money you will need to put into it? That’s what organizational leaders and funders will want to know. In this section, you’ll add up the costs and benefits of your technology project to calculate a reasonable Return On Investment, or ROI.

Costs

Every tech project will have some kind of cost. The costs may not be monetary, but even free technology will require time to research and implement—and there are always opportunity costs for every action you take. While not every benefit or cost is easy to quantify, the more you’re able to tie your costs to dollars or other quantifiable measures, the easier it is to argue that your organization is getting a good return on its technology investment.

DOLLAR COSTS

Itemize and calculate anticipated cash expenditures. This may include hardware, software, subscriptions, consulting support, maintenance, training, and more.

<table>
<thead>
<tr>
<th>Item</th>
<th>Explanation</th>
<th>Cost in Dollars (Year 1)</th>
<th>Cost in Dollars (Ongoing)</th>
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TIME COSTS

Itemize the amount of staff time that will be needed to implement and operate your new technology, and then convert those hours into dollars using an hourly rate roughly equivalent to the hourly compensation of affected staff members. This may include planning, implementation, training, operation, and more.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Staff Hours</th>
<th>Cost in Dollars (Year 1)</th>
<th>Cost in Dollars (Ongoing)</th>
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COSTS THAT ARE DIFFICULT TO MEASURE

You might not be able to precisely measure every cost. Missed opportunities due to time spent implementing a new system are hypotheticals—it’s impossible to say exactly what might or might not happen as the result of one decision. And it’s hard to attach a specific cost to morale. Technology implementation projects are often difficult and disruptive to daily life. How will staff members respond to these challenges?

Pursuing a particular technology solution, especially if the costs come out of your organization’s technology budget, often mean putting off other upgrades. What’s the cost of not updating other technology tools? Will you have to spend more on maintenance if you defer an upgrade? Are you likely to experience increased downtime? Calculating in how other technology might age while you’re focused on this project will help you better gauge whether it’s worth it to move forward. You might find that a different technology project should actually be a higher priority.

For costs that are hard to measure, try to think about what measurable proxies might exist. For example, an afterschool tutoring program might have to close for two days while it implements a new database. As a result, the students lose X number of hours of instruction. Can you assign a dollar amount to the value of that lost instruction?

Another example might be staff morale. Is there a risk that staff members will be so unhappy with this process that they’ll want to quit? There are real costs to turnover that you can calculate in your ROI.

Below, list any costs that you can’t assign a specific dollar value to. Rate each as follows:

1 = Insignificant cost  2 = Moderate cost  3 = Major cost

<table>
<thead>
<tr>
<th>Other Costs</th>
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Benefits

In Worksheet 3, you listed the benefits to your organization of implementing this new technology. Now it’s time to assign value to those benefits.

Some benefits are straightforward. For example, if you no longer need to pay for a software license, that savings is a benefit that can be represented in real dollars. Similarly, if your new email marketing platform enables a more-nuanced fundraising strategy, the resulting increase in donations will be a dollar amount.

Other benefits can still be represented as dollars, but might require you to find a proxy to help you calculate the value—especially if it’s an increase in services. For example, if your new technology enables you to serve 40 additional senior citizens, how much does your service save the health system in medical costs? If you can figure out that number, it can serve as a proxy benefit when calculating your ROI.

It’s also useful to break down benefits based on how they improve your organization and its operations versus the social benefits of your proposal. You’ll be better able to show operational benefits in terms of dollars, but the social benefits will matter more to most audiences, so remember to lead with the social impact whenever possible.

**ORGANIZATIONAL BENEFITS**

List the benefits that directly affect your organization’s operations, how you will derive a dollar amount from that benefit, and the dollars saved (or gained) over time.

<table>
<thead>
<tr>
<th>Benefit to organization</th>
<th>Measurement</th>
<th>Benefit in dollars (Year 1)</th>
<th>Benefit in dollars (Ongoing)</th>
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</table>
SOCIAL BENEFITS

List the benefits of your technology that will improve life for people in your community. Only list benefits that have a reasonable proxy and that you can assign a dollar value to. Benefits that are hard to measure can be added to the next section.

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<tr>
<th>Benefit to society</th>
<th>Measurement</th>
<th>Benefit in dollars (Year 1)</th>
<th>Benefit in dollars (Ongoing)</th>
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Total

Note that ROI calculations are not the same as budgeting calculations. While the benefits of your services might be worth millions of dollars to your community, that does not mean that millions of dollars are going into your bank account. Your ROI is one data point that you can present with your budget, but it cannot replace a budget. Regardless of the impact, you need the right amount of cash to actually pay for your project.

BENEFITS THAT ARE DIFFICULT TO MEASURE

As with costs, it’s not always easy to assign a dollar value to some benefits. For example, if your online civics education course saw a 20 percent increase in positive attitudes toward democracy after you switched from a static website to a Learning Management System, that seems like a big benefit—but how do you assign a dollar value to less cynicism?

Below, list any benefits to which you can’t assign a specific dollar value. Instead of dollars, rate your benefit from 1 (small) to 3 (major benefit).

1= Small benefit  
2= Moderate benefit  
3= Major benefit

<table>
<thead>
<tr>
<th>Other Benefits</th>
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Total
ROI Calculation

A basic ROI calculation is derived by subtracting the difference between the sum of your benefits and the sum of your costs, then dividing by your costs. It’s often represented by the formula:

\[
\text{ROI} = \frac{\text{Benefits} - \text{Costs}}{\text{Costs}}
\]

What the formula shows is the percentage by which your return exceeded your investment. For example, if your new CRM module costs $40 per month, but saves 10 hours per month of time for a staff member who makes $10 per hour, then you can see that each month the new module is delivering 150 percent of the value that you’re paying.

\[
\text{Benefits} - \text{Costs} = \text{benefit-cost}
\]

\[
\frac{\text{benefit-cost}}{\text{Costs}} = 1.5, \text{ or } 150\%
\]

And that’s only if you’re simply reducing staff hours. If, with those 10 hours, your staff member is now able to serve 30 additional constituents per month—and you’ve valued those services at $30 per person—then the ROI can be even higher. Calculating the value of the benefit at $900, then subtracting out the $40 investment and dividing by $40, you get a 2,150 percent Return On Investment.

\[
\text{Benefits} - \text{Costs} = \text{benefit-cost}
\]

\[
\frac{\text{benefit-cost}}{\text{Costs}} = 2,150\% \text{ (ROI)}
\]

Whether you use this ROI formula or not, what’s important is knowing that your benefits are greater than your costs and that you can explain that difference to decisionmakers and others who care about your organization. In fact, if you’re not confident in your numbers, you might instead rely on the significance of your benefits. For example, if you can list 10 benefits and make a special point to highlight the more significant benefits, and line those benefits up against three or four costs, the benefits side of the ledger will have a visual advantage on the page over the costs. Sheer number of benefits will never fully outweigh a significant cost, but if your costs are moderate or low, you might be able to make a strong case without quantifying every benefit and cost.

PowerPoint Pitch Template

Remember, this workbook has a PowerPoint template companion piece that provides you with all the slides you need to build your own pitch deck for a tech presentation plus helpful hints and tips. If you haven’t already, download the deck for free at https://offers.technimpact.org/reports/pitch_kit
The value of your technology project is closely linked to your ability to carry out the project on time and on budget. That means you need a plan for how to carry out the stages of your technology project, and you must show that plan to colleagues and decisionmakers.

Each technology project will have its own unique stages. Make sure you're working with an expert to think through every aspect of a successful technology launch. This section includes some of the most common stages as well as guidance to help you communicate your process in your pitch. As you go through each stage, also apply rough timelines for how long you think it will take.

Requirements

Before you choose a tool, you'll need to articulate exactly what you need your technology to do. Vendors and consultants typically expect you to develop a requirements document that details all of the different features or capabilities you're looking for in your technology.

The level of detail of a requirements document is related to the level of complexity of the technology you're seeking. And typically, the more complex the technology, the more people need to be involved.

It’s smart to work on this ahead of making your pitch to leaders or funders. Not only will it help you get a clearer view of the costs and benefits, but working on a requirements document will also teach you a lot about the technology you’re considering.

For your pitch, it’s important to show that you’ve thoroughly considered what your organization needs, and that you drew on the expertise of your colleagues. Below, list the people who provided input into your requirements document.

1. 

2. 

3. 

4. 

5. 

6. 

WORKSHEET 5: Your Process
Use this page to draw a diagram showing who gave input at each stage.
Comparing Options and Vetting the Technology

Once you have your requirements in hand, you’ll need to do some research into potential tools or vendors. It’s also smart to have done some work on this stage before your pitch, because it will allow you to focus decisionmakers on a few tools and help you be clear about the potential costs and benefits.

Describe the process you’ve already undertaken to narrow your technology choices. Then sketch out how you will more deeply vet technology tools and vendors. Consider including desk research, conversations with peer organizations, demos, and free trials.

__________________________________________

__________________________________________

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__________________________________________

__________________________________________

Time Estimate for Vetting the Technology: ____________________________
Choosing a Consultant

Your consultant will be an important partner in the implementation of your technology. If your organization has highly capable technical staff, you may not need much help from a consultant, but at a minimum you should consider having an expert you can check in with to verify your approach and to offer guidance along the way. Hiring a consultant is also about bringing in the people power you need to get your project done on time. If you are more comfortable handling the technical details yourself, you still may want to bring on a consultant to provide project management.

Regardless of how you choose to work with a consultant, it's important to show decisionmakers that your consultant is qualified for the job and dedicated to your success. Here are some questions you might answer in your pitch.

1. What skills does your consultant bring to the project?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

2. How much experience does your consultant have working with similarly sized nonprofits?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

3. How much experience does your consultant have working with the specific technology you're considering?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

4. Is your consultant local? Is that important?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

5. What do references say about the consultant?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

6. How good is your consultant at explaining the technology to you?
   __________________________________________________________
   __________________________________________________________
   __________________________________________________________

For more on choosing a consultant, read our article, How to Find, Hire, and Collaborate with Technology Consultants.
Implementation

The implementation of a large system, such as a Constituent Relationship Management (CRM) or Enterprise Resource Planning (ERP) system, will involve many steps, including installation, adding modules, adjusting settings, cleaning data in the old system, migrating data to the new system, testing the system, going live, and more.

For projects that have multiple stages or that will have a significant effect on your organization’s processes or systems, a Project Manager is critical. Knowing who will have overall project management responsibility can help ensure the success of a project.

You’ll want to show decisionmakers how you plan to carry out an implementation process, including who is responsible for which stage and timing for each stage. Below, draw a diagram of your implementation process. You may need to work with a consultant to accurately represent each stage.

Time Estimate for the Implementation Process: ____________________________
Training

A well designed, well implemented system can still fail if an organization has not invested in training. Below, outline a plan for initial training. Consider how many hours of training you’ll need, how many sessions, whether a consultant or vendor will lead the training (make sure you’ve included that in the costs), and whether you’ll invest in ongoing training or refresher courses.

How many sessions of training will you host?

SESSION 1
1. Focus area?

_________________________________________________________________________________

2. Who needs to attend?

_________________________________________________________________________________

3. What will you cover?

_________________________________________________________________________________

4. How much time is needed?

_________________________________________________________________________________

5. Who will lead the training?

_________________________________________________________________________________

SESSION 2
1. Focus area?

_________________________________________________________________________________

2. Who needs to attend?

_________________________________________________________________________________

3. What will you cover?

_________________________________________________________________________________

4. How much time is needed?

_________________________________________________________________________________

5. Who will lead the training?

_________________________________________________________________________________
SESSION 3

1. Focus area?

2. Who needs to attend?

3. What will you cover?

4. How much time is needed?

5. Who will lead the training?

Sustainability

Technology systems or tools begin to erode the moment they are implemented. Regular maintenance is needed to keep the technology functioning its best once all the hard work of setting it up and getting it running is over.

Answer the questions below to help you continue building on the success of your technology implementation.

1. Who are the superusers? List them by name, and then outline their responsibilities, which may include updating and keeping up with new features.

2. Who will maintain the system over time? List them by name.
3. How often will you schedule maintenance?

4. Are you budgeting for recalibration? Once users are regularly working with a technology, they notice tweaks that need to be made. Will you need to work with a consultant on adjustments after implementation? Make sure to include this work in your project budget and work plan.

5. How will you promote user adoption? Will you offer incentives? Tests? Performance evaluations?
This workbook includes a companion “pitch deck,” or PowerPoint presentation template, that you can adapt for your own pitch meeting. If you haven’t already, download the deck for free at https://offers.techimpact.org/reports/pitch_kit. In this section, we’ve also included a few pointers to help improve your chances of success during your pitch meeting.

Know Your Audience

In Worksheet 2, we suggested that you tailor your arguments to your audience. There’s actually an important step to consider before you even get to making arguments.

If you’re planning on pitching your tech project to a funder, pick up the phone first and have a conversation. A short phone call will help you gauge how interested your funder will be in your project and give you hints for how to frame your proposal. In fact, many funders welcome this kind of engagement before a proposal reaches their inbox.

If your audience is internal, find an ally who can use their relationships to help convince others. For example, if your board of directors has the final say on your project, it’s helpful to have a board member who is a collaborator and is excited about the potential of your technology project. If your organization is large and has multiple levels of management, look for an “executive sponsor” who can help you reach important decisionmakers.

Present Like a Pro

You don’t have to be charismatic or entertaining to be a good presenter. You just have to know your audience and be prepared. With a little help, anyone can give an engaging presentation. Here are a few tips to help you present like a pro:

- Get there early and come prepared.
- Relax and look for opportunities to create dialogue.
- Make eye contact frequently.
- Tell stories or anecdotes, especially at the beginning and end.
- Keep your messages short and focused.
- Let your enthusiasm for the technology come through.
- Show your passion for the organization’s mission.
- If you have an “aha” moment that led to this technology, share it.
- Make sure your audience understands the action you need it to take.

“People underestimate their ability to pick up the phone and get a meeting.”

—Colin Jones, Collins Foundation
Keep Your Focus on Benefits

For tech people, it’s hard not to “geek out” on all the cool new features the technology offers. But your pitch is not the time for this. If you find yourself straying into the technology weeds, back up and reiterate what the technology will do for your organization or community. Funders, board members, and fellow staffers probably won’t understand what a tier one data center is or the difference between an API and native integration—nor do they need to. If they get distracted or confused by these details, you’ll lose their support. This doesn’t mean that you don’t need to communicate any technical details. Just make sure that the information you’re sharing is what they need to know to support your project.

Emphasize Your History of Success

Have you implemented other successful technology projects? If so, remind your team or decisionmakers about those projects and connect your plans to what worked previously. Tying your project to something everyone is familiar with will increase their confidence in you and make the unknown a little less scary.

Prepare for Questions

No matter how much you actually know about the technology, to your audience, you are the expert. Learn as much as you can about the technology you’re proposing; when you don’t know something, be ready to explain how you’ll get the answers they need.

Prepare for Common Objections

You know your audience. You know what they often object to or what triggers a negative reaction. In particular, technology pitches bring up similar objections from organization to organization. Here are a few you can prepare to address.

1. **This is just more overhead.** Emphasize the work the technology helps you do and the outcomes you’ll be able to achieve with this new tool. Focus on your organization’s mission and try to find comparisons to other essential tools your organization can’t live without.

2. **Technology is too complicated; something always goes wrong.** Reinforce your plan for implementation and sustainability. Go over who is responsible for maintaining your technology and how it figures into the budget (if there’s an ongoing cost). Also, if you’re using an online application that stores data in the cloud, emphasize that there are no servers to maintain and most of the technical side of your technology is being managed by experts. (And don’t forget to mention how you will back up the data so that nothing gets lost.)

3. **It’s going to be outdated soon and then we’ll have to do this all over again.** If you’re using a cloud-based application, this is another opportunity to talk about the benefits of working in the cloud. Tell them that the vendor is continually updating the software and you’ll always have the opportunity to work with the latest version.

“I love it when a proposal is crisp and clean.”
—Rebecca Shavlik, Shavlik Family Foundation
4. **What’s wrong with what you already have?** Make sure they understand your pain points, especially when inefficiencies get in the way of maximizing your impact. It’s also helpful to set expectations for the future. They need to understand that technology is like an automobile. You can keep that old truck running, but if it’s leaking oil, spewing black smoke, gets fewer miles per gallon, and needs to go into the shop twice as often as it did 10 years ago, it’s not really a bargain anymore. In fact, it might be doing more harm than good.

5. **My friend uses something different at her nonprofit.** Nonprofit communities can be small sometimes. If a board member knows someone who uses a tool that sounds similar, listen carefully and don’t get defensive. You might have overlooked something or you might hear details that indicate that the solution does not quite match your needs. Regardless of the potential of the solution, make sure your board member understands that you’ve already gone through a rigorous process and are confident in where you’ve landed, but that you’re also open to talking with that person to learn more. This might delay the beginning of your project slightly, but it will earn you trust when you can report back the results of your additional research.

6. **My brother-in-law can build that for free.** The can-do spirit of volunteers is absolutely vital to the success of many nonprofits. Use that energy to your advantage. Explain the downsides of a volunteer building your technology (elongated timelines, uneven support, mismatched solutions, inconsistent quality, etc.), but don’t close the door on involving volunteers. Suggest that the brother-in-law can be a valuable tester and thought partner while you work with vendors and consultants to implement the project.

**Demonstrate Your Pain Points**

Sometimes people need to see what’s not working to understand how important the solution really is. In your presentation, consider actually showing your audience how the technology is slow, cumbersome, or inaccurate. A demo can also allow you to show what your new technology will do, making the features and benefits easier to understand and more relatable.

**Show Strength in Numbers**

You don’t have to pitch your tech project alone. In fact, your case might be stronger if it’s presented by multiple people. A colleague with a slightly different perspective, an executive sponsor, or a board member can help you draw out important nuances of your project and can show that there’s broader interest in this technology than just your own. You might also consider involving your consultant, especially if they’re good at explaining the technology to a non-technical audience.

**Share Your Presentation Deck**

It’s helpful for your audience to have a document to refer to when contemplating your request. Some presenters like to send their pitch deck via email ahead of the presentation. Others provide printed copies or email a document after the presentation.
It can be intimidating to stand in front of a room of people and make your case for a technology tool that your audience doesn’t really understand. The trick is to not put the focus on the technology. What everyone in that room cares about is doing good work for your community. The technology you’re proposing is simply a means to that end. Being clear about the need you’re addressing and how it aligns with your organization’s mission and strategic plan is what is going to get you to “yes.”

We’ve given you the tools you need to succeed, and by completing this pitch kit, we hope we’ve helped you find the confidence you need to make your case successfully. Good luck pitching. We’re rooting for you!
**ADDITIONAL READING**

- **10 Tips for Funding Technology**, GuideStar
  [https://trust.guidestar.org/10-tips-for-funding-technology](https://trust.guidestar.org/10-tips-for-funding-technology)

- **The 10th Annual Nonprofit Technology Staffing and Investments Report**, NTEN

- **25 Tips for Evaluating (and Writing) Successful Technology Grant Proposals**, Internaut Consulting

- **Calculating ROI on Information Technology Projects**, Enfocus Solutions
  [https://enfocussolutions.com/calculating-roi-on-information-technology-projects/](https://enfocussolutions.com/calculating-roi-on-information-technology-projects/)

- **Cracking the Code of Technology Capacity Building**, Center for Effective Philanthropy
  [https://cep.org/cracking-code-technology-capacity-building/](https://cep.org/cracking-code-technology-capacity-building/)

- **The Dos and Don’ts of Grant Proposals for Tech Funding**, Philanthropy News Network
  [https://www.tgci.com/sites/default/files/pdf/Dos and Dons of Grant Proposals for Tech Funding_0.pdf](https://www.tgci.com/sites/default/files/pdf/Dos and Dons of Grant Proposals for Tech Funding_0.pdf)

- **Funding Technology Projects**, Idealware
  [https://www.idealware.org/funding-technology-projects/](https://www.idealware.org/funding-technology-projects/)

- **How to Win Corporate and Foundation Grants for Your Tech Project**, The Journal
  [https://thejournal.com/articles/2015/01/22/how-to-win-corporate-and-foundation-grants-for-your-tech-project.aspx](https://thejournal.com/articles/2015/01/22/how-to-win-corporate-and-foundation-grants-for-your-tech-project.aspx)

- **Measuring Return On Investment for Technology**, Idealware

- **ROI of IT: How to Calculate, Measure & Improve ROI on IT Investments**, VertitechIT

- **Why Fund Tech for Nonprofits**, TechSoup
ABOUT THIS REPORT

Authors

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Dan Rivas is a writer and editor who has worked with nonprofits, local governments, and large companies to research and communicate ideas that move communities forward. He lives in Portland, Oregon.

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Karen is a sought-after speaker, trainer, writer, and consultant with expertise in technology leadership and innovation, nonprofit software, and digital strategy. As Tech Impact’s Director of Education and Outreach, she leads the Idealware team of researchers, presenters, and writers who create technology information resources designed to help nonprofit leaders put their vision into action. Her past experience includes leading the technology consulting services and nonprofit technology learning and networking programs at MAP for Nonprofits, helping to build the nonprofit CRM/database solution provider thedatabank from a startup to a thriving software company, and various roles in arts and human services organizations. She holds an MBA in Nonprofit Management from the University of St. Thomas.

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Rebecca Shavlik, Shavlik Family Foundation
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About Our Sponsors

**Kindful**
Kindful is a donor management and fundraising platform that is designed for nonprofits that are looking to spend less time on administrative tasks and more time on building deeper relationships with their donors. Kindful is built to integrate with the apps you already love, which means you can use Kindful for donor management, online fundraising, donor communication, in-depth donor analytics, tracking and reporting, and more.

**Community IT**
Community IT is a top-ranked Managed Services Provider (MSP) in the Washington, DC region and a recognized leader in the nonprofit technology community. A 100 percent employee owned company, Community IT focuses on helping nonprofit organizations achieve their missions through the effective use of technology. Services include IT security, cloud migration, help desk support, and strategic IT planning.

**WizeHive**
WizeHive serves some of the most important mission-based organizations—foundations, nonprofits, universities, associations, and government offices—with Zengine, its comprehensive, easy-to-use, and flexible grants management software. Humbled by the missions that drive their clients, it is their mission to design technology with grantee experience, impact reporting, and achieving your objectives in mind. Pairing the platform with dedicated and human service, one-on-one training, and continual educational opportunities, WizeHive serves as a partner continually innovating and collaborating for the good of your objectives.
About Tech Impact’s Idealware

Tech Impact is a nonprofit on a mission to empower communities and nonprofits to use technology to better serve the world. The organization is a leading provider of technology education and solutions for nonprofits and operates award-winning IT and customer experience training programs designed to help young adults launch their careers. Tech Impact offers a comprehensive suite of technology services that includes managed IT support, data and strategy services, telecommunications, and cloud computing integration and support.

In 2018, it expanded its education and outreach capabilities by merging with Idealware, an authoritative source for independent, thoroughly researched technology resources for the social sector. Tech Impact’s ITWorks and CXWorks training programs have graduated hundreds of young adults with the knowledge, skills and confidence they need to start their careers in the technology and customer experience industries. The organization also operates Punchcode, a coding bootcamp based in Las Vegas, NV. Learn more at www.techimpact.org.

About the Technology Learning Center

Tech Impact’s Technology Learning Center, or TLC, is an expansive collection of technology education materials—just like this workbook—created exclusively for nonprofits. It includes hundreds of free publications and downloads, a free organizational tech assessment, and the most comprehensive curriculum of webinars, courses, and on-demand learning about nonprofit technology currently available. The vast majority of resources are free, and the remainder are priced within reach of even the smallest nonprofits. Give your tech knowledge a little TLC at https://techimpact.org/technology-learning-center.
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Online ticketing and reserved seating software, developed by and for people who recognize the positive power of the arts.

**CiviCore**
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**Rallybound**
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Let’s Make Good Happen. www.neonone.com