Gaining Board Approval for Technology Investments

Pitch deck for board members

PRESENTER NAME

Title

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How To Use This Deck

READ THE SLIDE NOTES

We've included notes for each slide to help you customize your presentation.

SLIDE TEXT

Many slides have example text that you may want to include or remove.

IMAGES

We've included a few images that you are welcome to use or replace with your own photos, logos or graphics. Consider including screenshots or videos of your current processes.

APPENDIX & ADDITIONAL SLIDES

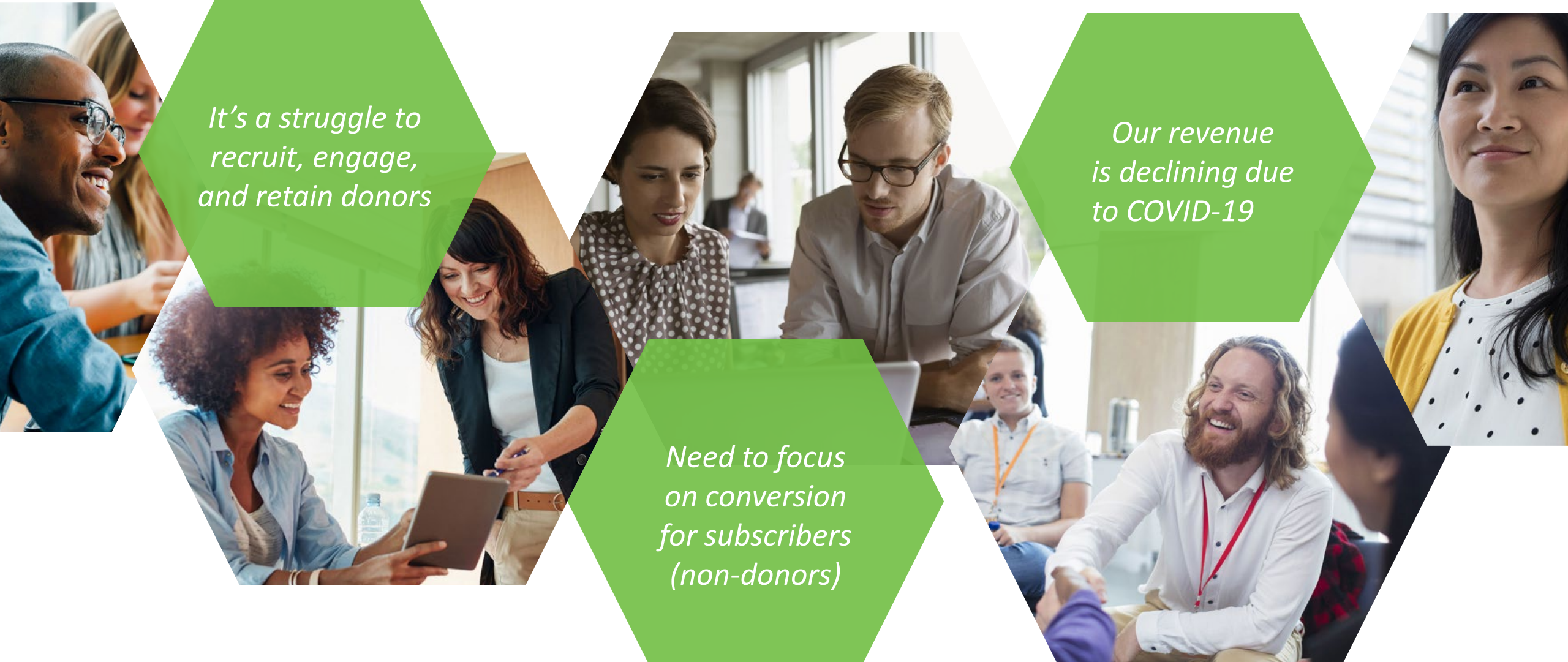Optional slides are included and addition to core slides with alternative images.

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Setting the Stage: Glossary of Terms

JARGON	PLAIN ENGLISH MEANING
CLOUD SYSTEM OR SOFTWARE AS A SERVICE	Data is stored securely on a server located in the United States and can be accessed using a web browser or phone app. Examples include Office 365, Dropbox, and Salesforce.
CONSTITUENT RELATIONSHIP MANAGEMENT SYSTEM OR DATABASE	A place to store information about your supporters. The "database of record". May be a unified system used by everyone in the organization.
MARKETING AUTOMATION	Software used to automate marketing actions such as sending email messages, publishing social media posts, and other digital actions.
ONLINE FUNDRAISING SYSTEM	Assorted secure platforms where donors are able to make gifts online. Typically includes event management and membership functionality too.
RESPONSIVE DESIGN	When a form or email message is displayed on a mobile device, it automatically adjusts sizing, layout, and proportions to display in a legible, easy-to-use manner.
SOCIAL MEDIA	Posting content on Facebook, Instagram, LinkedIn, Pinterest, Snapchat, and Twitter. Content can include fundraising appeals and donor recognition.
SUSTAINER	Donor who chooses to make a recurring gift and approves the nonprofit to charge their payment method every month.

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Our Organization's Top Three Challenges:

It's a struggle to recruit, engage, and retain donors

Our revenue is declining due to COVID-19

Need to focus on conversion for subscribers (non-donors)

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Does Our Technology Stack Help Us
Respond To Opportunities?

ISSUE	NOTES
A BOARD MEMBER WANTS US TO OFFER CORPORATE TEAM-BASED FUNDRAISING	Our current peer-to-peer tool only allows individuals to fundraise. No team functionality
SUSTAINING DONATIONS ARE GROWING FAST THANKS TO OUR NEW MONTHLY GIVING MARKETING CAMPAIGN	We need to manually process monthly gifts and we're having a hard time keeping up as the program grows
WE'VE GOT THE OPPORTUNITY TO APPLY FOR A GRANT TO FUND AN EXPANSION OF OUR EDUCATION PROGRAMS	The funder requires grantees to use a third-party interface for reporting and we can't get the data from our database to into their system

How Does Our Technology Stack
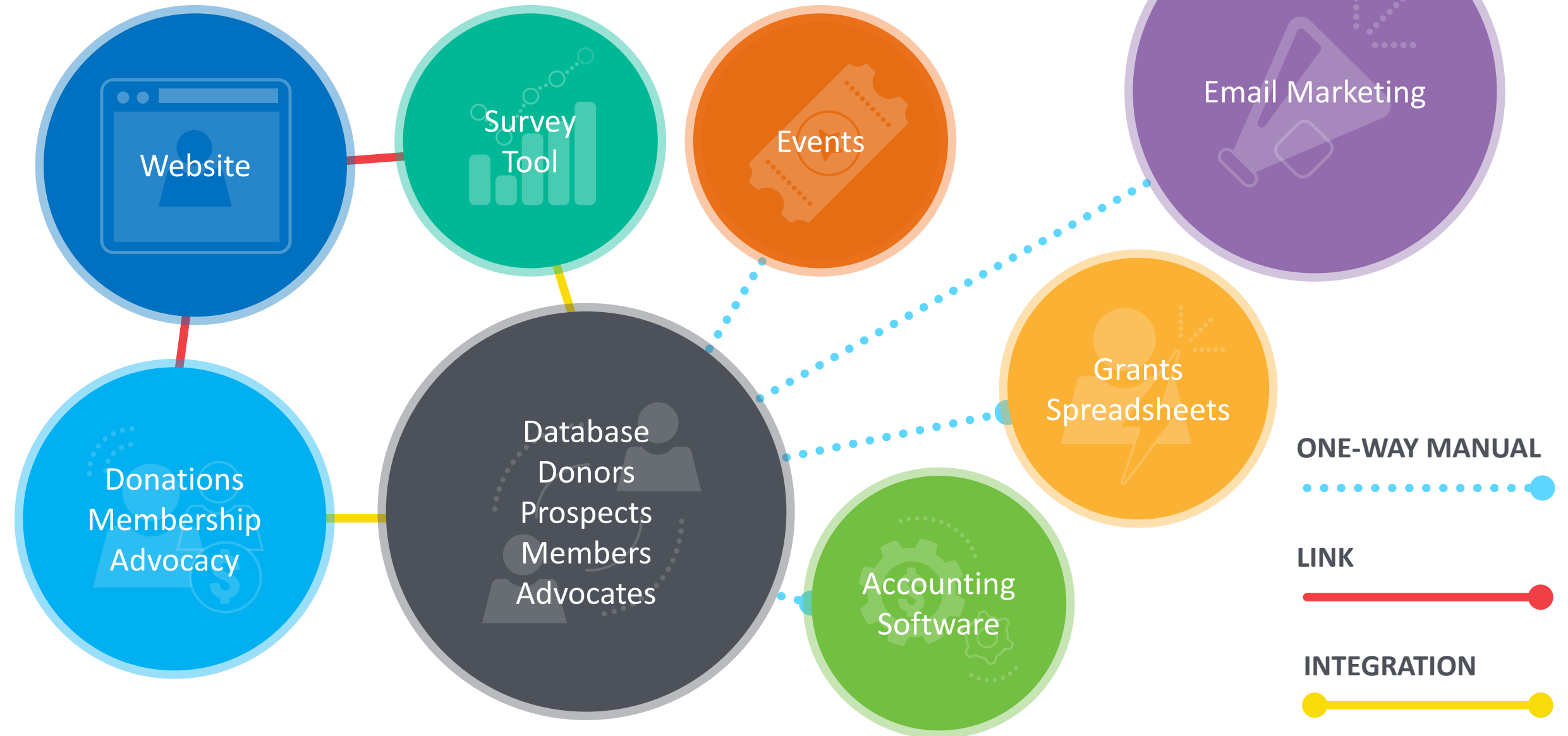## Contribute To Our Issues?

ISSUE	NOTES
OUR EMAIL MARKETING TOOL DOESN'T CONNECT TO OUR DATABASE	We can't send an automated new donor welcome series – Mary has to manually send these out
WE CAN'T ADD PAYPAL OR APPLE PAY TO OUR DONATION FORMS	We don't have the right tools to offer this to our supporters
REPORTS ARE CLUNKY TO RUN AND CAN'T BE CUSTOMIZED EASILY.	Our bookkeeper has to manipulate the donation report to get the gifts into quick books

Does Our Current Technology Stack Support Our Strategic Goals?

STRATEGIC GOAL	CURRETN TECH IMPACT ON GOALS	NOTES
GROW MONTHLY SUSTAINER PROGRAM BY 25%	NEUTRAL	Our current fundraising system can handle this
ADD PEER-TO-PEER FUNDRAISING	RESTRICTING	We don't have the right tools to offer this to our supporters
GROW MONTHLY SUSTAINER PROGRAM BY 25%	NEUTRAL	Our current fundraising system can handle this

Financial Management

Payments

Fundraising

Event Management

Digital Marketing

Fundraising CRM

Data Health + Analytics

Crowfunding

Peer-to-Peer Giving

Website

Heading goes here

Copy goes here and it can span over multiple lines as needed to explain concepts further.

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What would it look like
if we could focus
on our mission, and
not these challenges?

*What if our technology
drove innovation
without adding complexity?*

Increase your impact by driving resources, engagement, and efficiency

Grow Support & Resources

Advance your mission with the support you need—from funding, to awareness, to advocacy.

Optimize Programs & Measure Outcomes

Use data for visibility and transparency to accelerate outcomes.

Operate More Efficiently

Bring your stakeholders together with a streamlined, transparent process.

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It's Time To Level Up With A New Solution!

We propose to bring in XYZ company and their product(s) to replace (some or all of) our legacy systems.

Top 5 reasons We're Recommending XYZ

1 Reason here.

2 Reason here.

3 Reason here.

4 Reason here.

5 Reason here.

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Our Strategic Technology Goals: Years One to Three

YEAR ONE	YEAR TWO	YEAR THREE
• SYSTEM AND DATA MIGRATON • SCHEDULE AND AUTOMATICALLY SEND NEW QUARTERLY PERFORMANCE REPORTS TO LEADERSHIP • BEGIN USING GEOTARGETING TO SEND ACTION ALERTS TO NEW ADVOCATES	• ADD NEW PEER-TO-PEER FUNDRAISING PROGRAM • BEGIN ROUTINE WEALTH SCREENING AND MOVES MANAGEMENT FOR THE TOP OF OUR FILE • SEND SURVEYS TO NEW MONTHLY DONORS AND BEGIN TO SEND NEW SUSTAINER ENEWSLETTER E/O MONTH	• CONNECT FACEBOOK TO OUR PEER-TO-PEER FUNDRAISING CAMPAIGNS • ADD DATA CONNECTOR TO INTEGRATE FUNDRAISING AND ACCOUNTING SYSTEMS • SEND VIDEO THANK YOU MESSAGES TO NEW DONORS

Software Vendor Overview

Company address and URL

Vendor Logo

Overview

Nonprofit Clients

Current Costs Vs New Costs

ITEM	CURRENT COST	NEW COST YEAR ONE	NEW COST YEARS TWO & THREE
CRM			
EMAIL MARKETING TOOL			
EVENT MANAGEMENT TOOL			
ACCOUNTING SYSTEM			
MIGRATION AND TRAINING			
PROCESSING FEES			

Our Selection Process and Due Diligence

The Selection Team	
Evaluation Process	
Decision-Making Process	
Vendor References	

Draft Timeline

MONTH ONE	MONTH TWO	MONTH THREE	MONTH FOUR	MONTH FIVE	MONTH SIX

Questions?

Next Steps

- ✓ **REQUEST CONTRACT FROM VENDOR**
- ✓ **REVIEW AND EXECUTE CONTRACT**
- ✓ **ASSEMBLE OUR INTERNAL PROJECT TEAM**
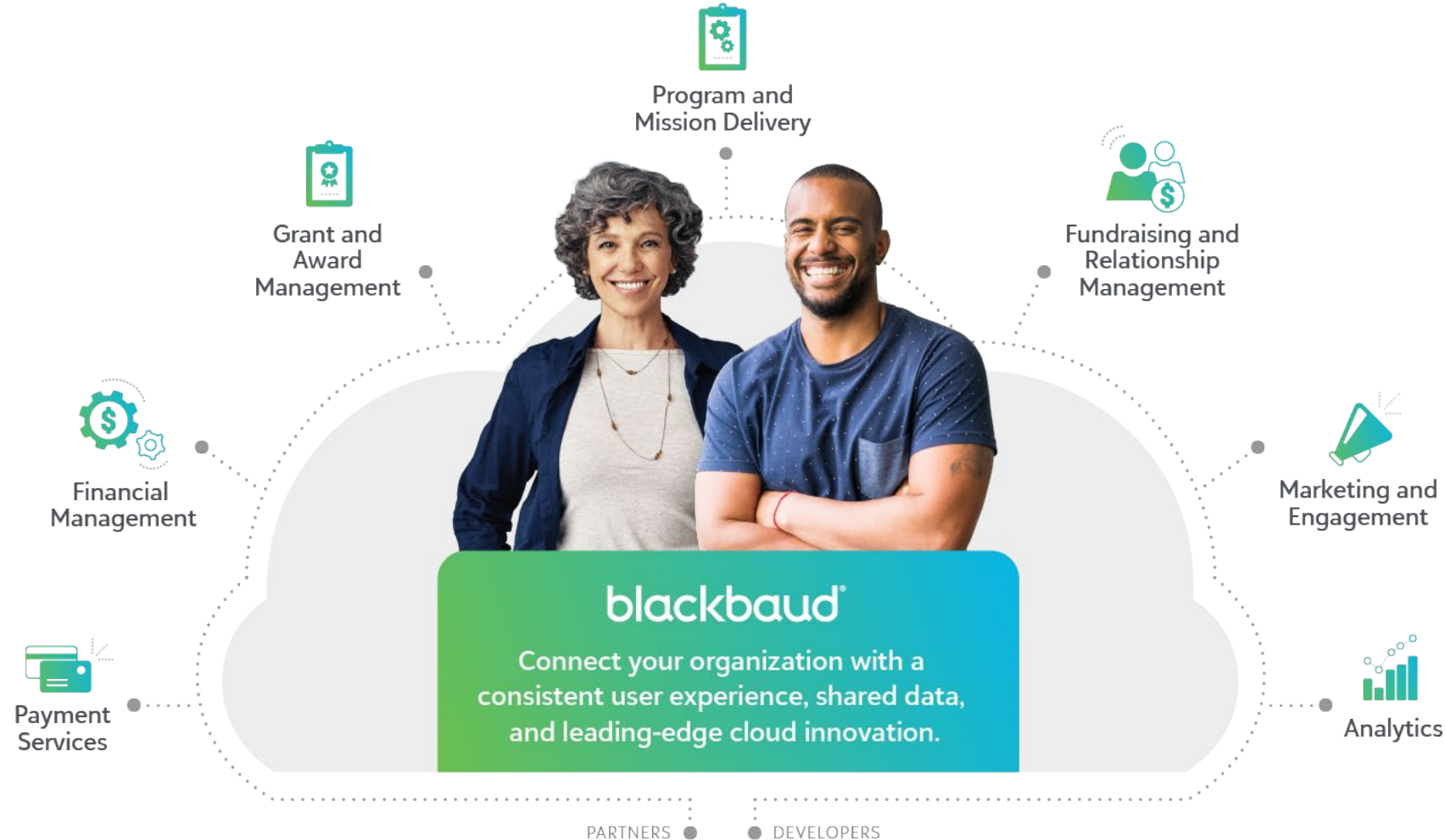- ✓ **ATTEND PROJECT KICK OFF MEETING**

APPENDIX

The Cloud Solution for Nonprofits

Purpose-built to drive digital transformation and impact across your organization. Flexible and scalable to work the way you want.

Program and Mission Delivery

Grant and Award Management

Fundraising and Relationship Management

Financial Management

Marketing and Engagement

Payment Services

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Connect your organization with a consistent user experience, shared data, and leading-edge cloud innovation.

Analytics

PARTNERS   DEVELOPERS

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Grow support and resources

Advance your mission with the support you need—from awareness, to funding, to action.

DEEPEN YOUR RELATIONSHIPS

DRIVE PARTICIPATION

SECURE RESOURCES

AMPLIFY YOUR MESSAGE AND IMPACT

Deepen your relationships
by understanding the passions and motivations of your supporters

Drive participation
by growing and mobilizing your audience to advance your cause

Secure resources
by increasing and diversifying your revenue to face challenges with resilience and sustainability

Amplify your message and impact
with the right tools to source and strengthen your advocates' voices

Optimize programs, measure outcomes

Steward your mission through data-driven decision making.

Prioritise and allocate resources

and get to the right place, at the right time

Increase your mission impact

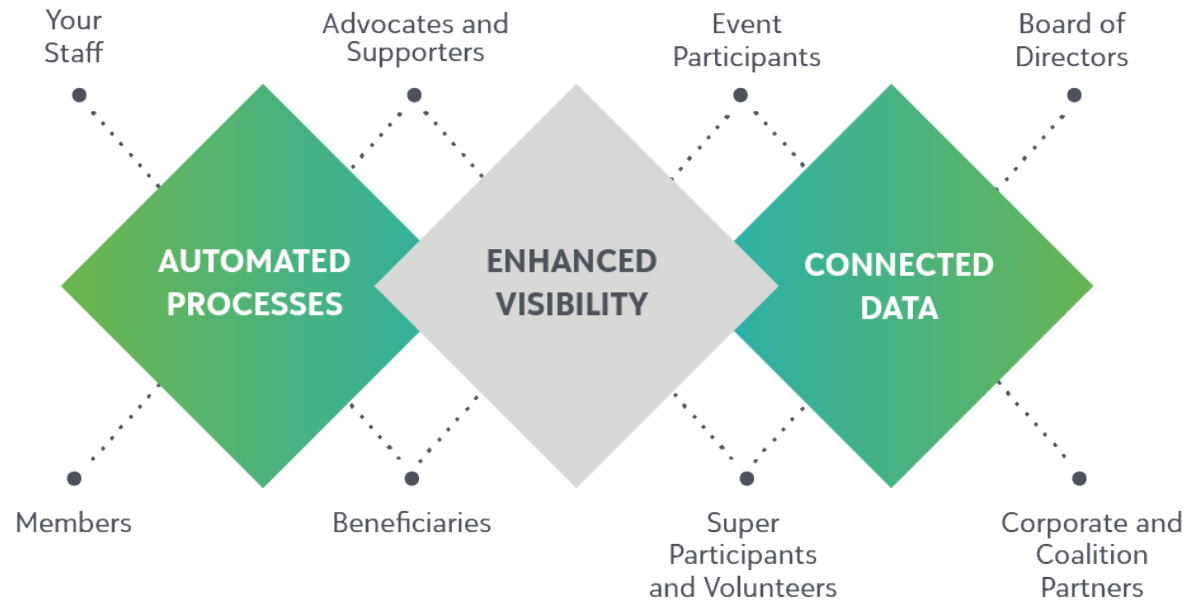through more effective programme delivery and grantmaking

Drive outcomes

by using data for visibility and transparency to accelerate outcomes

Operate more efficiently

Bring your stakeholders together with streamlined, transparent processes.

Your Staff

Advocates and Supporters

Event Participants

Board of Directors

AUTOMATED PROCESSES

ENHANCED VISIBILITY

CONNECTED DATA

Members

Beneficiaries

Super Participants and Volunteers

Corporate and Coalition Partners

Connected Data
Break down silos and drive collaboration.

Automated Processes
Get more done, more quickly, so your team can focus on highest-value tasks.

Enhanced Visibility
Get a 360° view of programme performance, supporters and more.

2x

increase in mobile donations in four years, from 9% to 21% from 2014 to 2017

56%

of organizations made a decision to move to a cloud service in the past year

10%

increase in new donor households between 2016-2017

12.1%

annual growth in online giving in 2017

Only 18%

of North Americans use mobile payments on a regular basis, even though 52% are "extremely aware" of them

23%

of millennials use contactless payments at least once a week

38%

———

of the audience reached by a given Facebook post was not already following the nonprofit

35%

———

growth in mobile gift size in 2017

40%

———

percentage of nonprofit website visitors from mobile traffic

18%

———

of nonprofits reported they were effective at building membership

89%

———

of institutions now compete primarily on the basis of customer experience

53%

———

of millennials are equally comfortable with their own abilities to create change in support of causes

86%

---

of nonprofits reported an increase in demand for their services

57%

---

of nonprofits unable to meet this rising demand

31%

---

of nonprofits said finding volunteers was their #1 concern

16.1%

---

decline in number of donor household's giving for the first time (2010–2016)

7%

---

decrease in number of households making any charitable gift between 2010-2016

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