Adopting New Technology

MARK LARIMER, FOUNDANT TECHNOLOGIES

Learning new technology and incorporating it into your work is an adventure. And, like any adventure, your preparation and planning will determine whether the experience is one to remember or one to forget.

Have you decided to try new technology to make it easier to administer your grant programs or communicate with your board members? Or are you still using outdated systems?

New technology can be exciting, but it also means change and, as everyone knows, change can be hard; change can be risky; and change opens you up to the possibility of failure. These factors make change scary, especially when many different personalities may need to change with you, and it's no surprise that many small-staff grantmaking organizations continue to use older technology.

Although there are no ways to guarantee success in every technology transition, some key steps will make success more likely and the transition easier to manage.

Know Your Stakeholders' Needs

Do you know what your stakeholders believe to be your organization's most pressing issues? If not, the time to find out is before you decide to buy new technology.

As an organization, it also is important to define the desired results of the new technology. For example, is everyone expected to use the new technology? Do your board members expect to be expert users? Who is responsible for training and support?

When it comes to an organization's technology, conflicting desires are everywhere. Unless you are buying technology exclusively for personal use, you need to understand the needs and fears of the other users if you want them to help you implement and use the new technology. In our experience, people are happy to meet the challenges that occur while learning new technology if they were part of the decision to buy it, and if their needs were considered during the selection process.

Potential hazard: not defining success. If you do not define success before you start, how will you know if your implementation succeeded? Failing to define success is a common mistake for organizations of all sizes, and the results can be costly in time, money, and effort. It can be incredibly frustrating, for example, to spend additional resources on training or support because you did not meet goals or requirements that you never knew existed. giving strategy and additional board members with community or issue expertise.

Often the greatest source of frustration when implementing technology is not receiving the support or training you need to use the technology to its fullest potential.

Identify the Problems to Solve

If you want to fail quickly, buy technology that does not solve a significant problem for your organization.

Buying technology that is cool but not essential only wastes time and money. If you cannot clearly state the problem(s) you are trying to solve and how solving them improves your organization, do not buy anything.

Potential hazard: focusing on features instead of solutions. Features are lucrative things, promising easier ways to do almost anything. Be careful of vendors trying to sell you their key features, when they do not, in fact,

address your most important needs. Also be wary of "feature creep" as your stakeholders try to solve or bolster their pet projects with features that may not serve the organization as a whole.

When stakeholders have unrealistic or conflicting expectations of what a new technology should do, it makes the process of selecting solutions particularly challenging. You will find it far easier to assess solutions if, as an organization, you prioritize your most pressing problems and then focus your selection on meeting those needs without being influenced by "nice to have" features.

Set Your Budget

Often the hardest step is to be honest with yourselves about how much you are willing to spend to solve your problem(s).

It is not uncommon for organizations to start with no budget then set expectations that require an investment beyond what they are willing to pay. This often results in not doing anything and falling back to the status quo. On the other side are those who do not consider the costs of maintaining the status quo. They look at any new investment as a completely incremental cost to running their organization.

Keep in mind: Research is free. To help you set a budget, numerous resources are available online or by asking questions of potential providers or other grantmakers. Asking for information or even advice from a potential provider should never cost you a penny.

Potential hazard: not sharing your budget with vendors. If your budget is based on what you are willing to pay to solve a problem, do not be afraid to share it with potential vendors. If vendors understand your constraints, they should refrain from showing you features you cannot afford. If you are upfront with your vendor regarding budget and do not add new requirements, it becomes your vendor's responsibility to meet your budget, not your responsibility to increase it.

Choose Your Vendor and Establish Their Role

Do you need or want a guide for your technology adventure? During the evaluation process, you will learn a lot about potential vendors based on how they engage with you. Are they pushy? Responsive? Do they care more about solving your problem or more about selling you their technology? Do they seem like a good fit for your organization's style? Are they willing to tell you they can't fit a need perfectly?

These are all interesting insights, and their importance depends on the level of involvement you need or expect from a vendor after the sale. If you are rolling out a technology that is lower cost, easily adopted, or not going to be used widely within your organization, you may not have significant needs of your vendor after the purchase. If this is the case, choose the most comfortable option based on price and features.

Unfortunately, often the greatest source of frustration when implementing technology is not receiving the support or training you need to use the technology to its fullest potential. This problem is multiplied when success depends on many people with multiple roles learning the new technology.

If a vendor's support is a necessary element, the best way to be sure you are choosing the right vendor is to ask for references. You should feel comfortable asking to speak with as many people as it takes to give you confidence. If you can find references through back channel sources that are not provided by the vendor, these are often the most insightful.

Above all, do not underestimate the importance of the relationship between you and your vendor. A strong relationship will overcome most problems you experience. A weak relationship will undermine trust and confidence regardless of the issue's size or scope.

Potential hazard: not asking the hard questions. The time you spend researching, planning, and setting expectations will save you time and money during the implementation process, save you frustrations, and keep your team on track.

If you feel uncomfortable asking certain questions of your team or potential vendors along the way, these are usually the most important ones to ask prior to making a decision.

What is on your mind that you might be keeping to yourself?

Good luck on your adventure!