

Achieving Strategic Goals through Operations Planning
(A Discussion of Best Practices for Technology Planning)

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Ineffective Technology Planning

- Apple iBooks as Furniture
 - Apple iBook laptops given to junior high school
 - School was PC based, so new software had to be purchased
 - Teachers lacked training on Apples
 - Electrical capacity needed to be upgraded
 - Internet and Laptop usage not integrated into curriculum
 - Laptops utilized by some students as footstools

Ineffective Technology Planning

- Product support issues
 - Word Processor and Email software don't work together
 - Custom solution supported by staff member who just left the organization
 - Fundraising database cannot support required number of users
 - Product installation takes longer than expected
 - Vendor goes out of business
 - Vendor no longer supports product version

Ineffective Technology Planning

- Reliability issues
 - Software bugs
 - Opening Browser crashes system
 - Antispam software blocks legitimate email messages
 - Can't make any sense of software documentation
 - Hardware failures
 - File server crashes repeatedly
 - Service Provider failure
 - Web Host provider fails to provide access to organization's web page

Ineffective Technology Planning

- Measuring effectiveness issues
 - Staff is hesitant to use new spreadsheet software
 - Wireless network is unused
 - New fundraising software does not meet organizational needs
 - Cannot determine whether new software and hardware purchases have increased productivity
 - Vendor's quoted price obscures true costs
 - Unanticipated product installation and support costs make calculating Total Cost of Ownership (TCO) and Return on Investment (ROI) difficult

The Role of Technology

- **Strategic Planning**
 - Defines organization mission and goals
- **Operations Planning**
 - Supports daily activities in support of mission
- **Technology**
 - Tool consisting of hardware, software and services
 - Adds value to the organization

Technology Planning

- **Objective is to add value**
 - Increase staff productivity
 - Manage client communications
 - Enhance service delivery
- **Examine daily operations**
- **Identify value added by technology**
- **Develop roadmap for incorporating solutions while maintaining existing operations**

- **New Services**
 - Installing a Wireless Network
 - Purchasing Fundraising tracking software
- **Upgraded Services**
 - Moving from Windows 2K to Windows XP
 - Upgrading to a new software version
- **Changing Service Providers**
 - Moving from Windows to Linux
 - Outsourcing web hosting to a service provider

Technology Solutions - Motivations

- **Maintain operations**
 - Existing technology is no longer supported
 - Microsoft no longer supports Windows 2000
 - Improve quality
 - Change Internet Service Provider
 - Decrease costs
 - Outsource web hosting, office applications
 - Support standards
 - Transition from using proprietary solutions associated with one vendor

Technology Solutions - Motivations

- **Enhance operations**
 - Introduce new functionality
 - Support staff mobility
 - Increase security for regulatory compliance
 - Backups of organization's critical data
 - Support organizational growth
 - Increase number of users accessing organization's website
 - Increase amount of disk space required for file server
 - Enable technology interactions
 - Upgrade software applications so that they can interact
 - Upgrade operating system so that it can communicate with the new file server

Technology Solutions - Categories

- Technology solutions can be classified in these categories:
 - Functional
 - What value does the technology add?
 - Reliability
 - Is the technology available when needed?
 - Lifecycle Model
 - How is the product supported from installation through implementation and upgrades?
 - Criteria forms the basis for more detailed technical discussions regarding product selection, evaluation, upgrade decisions, etc...

Reliability

- **Availability**
 - Technology has the minimum amount of downtime
- **Quality**
 - Technology provides the expected results
 - Antispam software blocks all junk emails
- **Scalability**
 - Technology supports the number of intended users
 - Fundraising database can support all organizational donors
- **Security**
 - Organizational resources are protected
 - Access to file server is restricted

- **Installation**
 - Technology can be installed with minimal disruption of daily operations
- **Integration**
 - Technology is compatible with existing base
 - Word processor and spreadsheet can work together
 - Introduction of solution does not break existing technology

Lifecycle

- **Maintenance**
 - Support resources are identified
 - Staff can ask questions
 - Technical Issues are addressed
 - Upgrades and patches are supported
- **Measurement**
 - Technology usage is tracked
 - Service provider provides usage statistics
 - Technology keeps logs of staff operations

Summary

- Technology consists of hardware, software and service provider tools utilized for achieving organizational goals
- Technology planning provides a roadmap for introducing solutions while maintaining existing operations
- Technology failures often arise because solution characteristics are not considered
- When considering technology solutions, planners should have an idea of the added value to their organization, their required reliability, and how technology usage will be supported

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