

2/12/2020

## Technology Roadmapping Workshop Notes:

- Our current technology:
  - Infrastructure
  - Marketing apps
  - Collaboration apps
  - Project management software
- Then move to Ideal Situation
  - Mock-up of ideal scene - focus on what is achievable
    - Centralizing control over the apps users are using
    - Accounting software doesn't talk to any other application
    - Never shut down current system until the new system is fully functional
    - Adoption challenges with users
    - Talk to the worker bees for their input into the new systems
- Gap Analysis
  - What is/would prevent you from taking you from where you currently are to where you want to be
    - Strategy, people, process-oriented, tech-oriented, time
    - Funding
      - Providing a plan to the financial decision-makers gives you a better leg up; explain why you need the funding
      - Take the ownership for building a business case for the need for your funding
      - Focus on how the technology will help the non-profit continue to drive their mission

## Going down the roadmap

- Initiatives - strategy, people, process, technology; break these down into subsets
  - What needs to get done
  - Where is the money actually
  - Budgeting time and setting realistic goals
  - Mind maps are helpful to see what is affecting what
    - Analyze cause and effect
- Priorities - prioritize the initiatives
- Timing/Dependencies
- Resources
  - Technical vs functional
  - Internal vs external
    - Lean on external resources with the intention to get rid of them
      - Internalize the support to handle
- Then get buy-in and execute
  - Including those who will be impacted

- Stakeholders, executives
- Be willing to adjust the plan; it will change!
- Keep your commitments
- Panelist Questions
  - How do you convince management to give you the time to create a roadmap?
    - Tim
      - Articulate the higher value of this planning
      - Balance priorities
      - Get management and normal users on board
  - Biggest successes from writing out a roadmap
    - Shawn - opening up communication with executives
    - Tom - time savings
      - Articulating the plan and break it down to be actionable
    - Tim - understanding of skills gap of stakeholders would have helped
      - Understanding of company culture
      - When hiring, look at the candidates' ability to use the technology we are currently using/plan to use
  - Further resources for next steps
    - Shawn - check out Tim's roadmap
      - Culture is important to consider and look into
      - Technology change management
      - Edward Jemming - systems staking
    - Tom - medium.com
    - Tim - Build with community IT webinar Feb 25th 1-2pm
      - Will send link for referene
      - Techimpact.org - non-profit providing services to non-profits
        - Idealist.org - white papers on CRM systems, studies
- Tim's Roadmap
  - Objectives
  - Tech Projects
    - Objectives, anticipated completion date, cost
    - Break down each project, and give management the "why" behind that change
    - KnowBe4 - proactive phishing email program