

Masterclass

Transformacja Cyfrowa

9 December 2022

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**Bertie
Bosredon**
(RE)CONNECTING NGOs

Introductions



Kid in Kakuma Refugee Camp (Kenya)

FAOO Fundacja Akademia
Organizacji Obywatelskich

**POLSKO-AMERYKAŃSKA
FUNDACJA WOLNOŚCI**

- Your name
- Your job title
- Your organisation
- Your biggest challenge / objective for 2023



Kilka rzeczy o mnie

Bertie Bosrédon* - International NGO digital consultant



*/bow-ray-don/

- 20+ years of experience in digital
11 years in house + 10 years as a consultant
- 130 different NGOs: digital transformation, governance & processes, online fundraising, technology signposting, reporting...
- 1.5 year in Madrid after 22 years in the UK
- French accent
- Freelance photographer & amateur handpan player
- Only speak Polish with Google Translate



Plan for today:

- Presenting key steps for a successful digital transformation
- Discussions and group work
- Templates to start planning / improving your digital activity



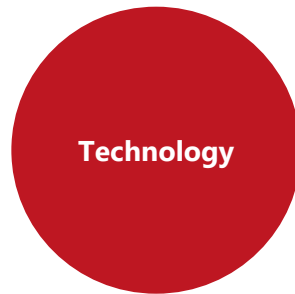
Digital Transformation... The VISION



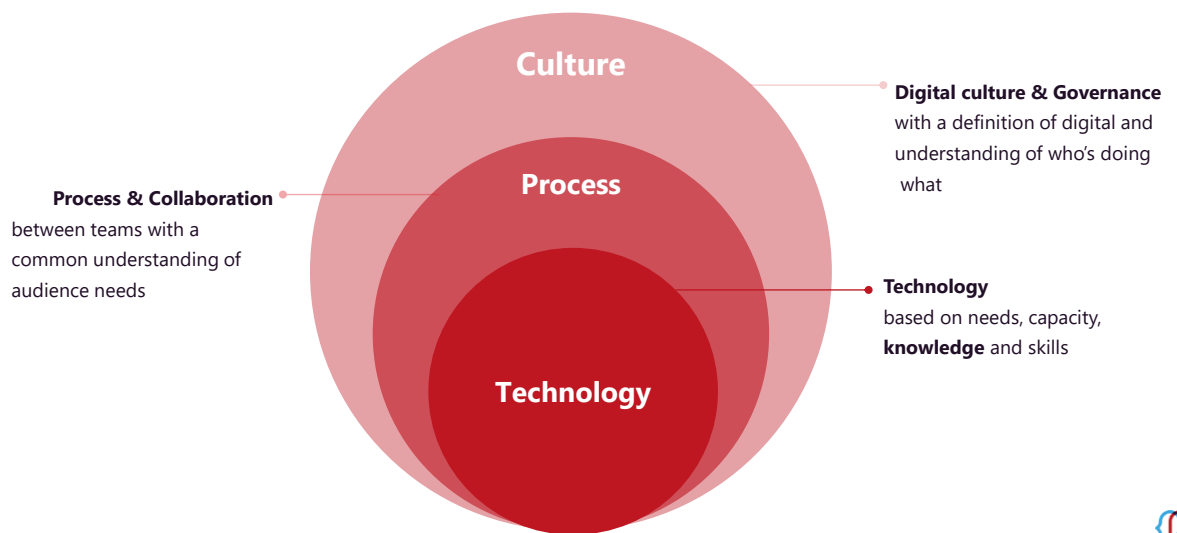
Digital Transformation... The REALITY



The wrong problem...



The approach

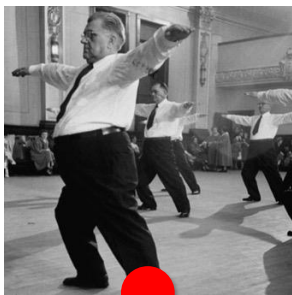


Digital transformation: where are you?

Quick questions	No	Starting to	Yes
Your organisation's leaders understand and champion the importance of digital and technology			
As an organisation, we understand and continually review the digital knowledge and skills of our staff, volunteers and trustees			
We do user research with people that use our services / fundraising products / campaigns and design according to their needs and behaviours			
We continually assess and improve our technology to make sure it meets our needs as an organisation			

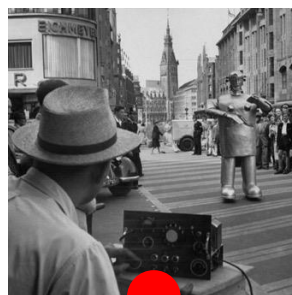
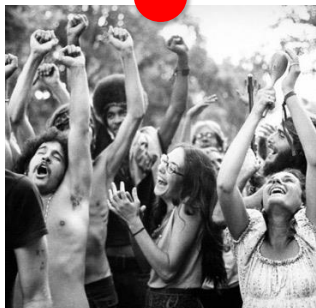


Transformacja Cyfrowa : the steps



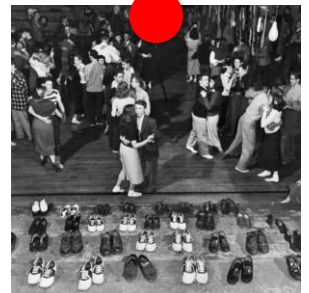
Governance & Processes

Audiences & Journeys



Tools & Technology

Data & Insights



Governance & Processes



Digital Maturity Assessment

- Stakeholder interviews



How to assess your digital maturity: Interviews

30-45mn Internal stakeholder interviews (practitioners, area owners, decision makers)

- Get a sense of the digital culture to Increase understanding of digital opportunities
- Understand structure and production process to optimise or prepare new workflows
- Examine collaboration between teams to identify best practice
- Analyse skills available and skills needed to fill skills gaps and recommend training areas
- Compile challenges (technical and strategic) to identify issues to resolve and suggest appropriate tools



Areas covered

The questions and areas covered were discussed and agreed prior to conducting the interviews.

5 core areas were covered.



Digital Culture & Opportunities

What digital means at [redacted] and the appetite to embed it across the organisation



Governance & Processes

How projects are defined, planned, managed, delivered and reviewed



Knowledge & Skills

What is the current level of digital knowledge and how to equip the workforce with essential skills



Technology & Data

Tools enabling [redacted] to deliver information, grow engagement and income



Challenges (technical & strategic)

Feedback from staff on the various technical and strategic challenges they're facing



Digital review
Culture, Process, Technology

Digital Culture

- The definition of digital at [redacted] is split between staff with a more operational mindset: defining digital by listing channel and stools. And a smaller number seeing digital as a mean or an aptitude to engage with your audience

There's a lack of understanding of what [redacted]

- Digital culture varies widely amongst teams with a feeling digital is not defined, often limited to social media, and not used to its full potential.

- Staff feel a lot of progress was made in the past two years but it's still v

- Digital is used and understood by a minority of staff involved directly in planning or delivery of their own digital projects but outside the core t is mostly unknown (this is reflected in the survey)

- The main causes of the lack of digital culture are:
 - Lack of knowledge
 - Lack of collaboration due to the absence of collaborative digi
 - Lack of strategic direction



- No one is seen as accountable for [redacted] digital presence. This results in confusion about how projects are prioritised.
- The Digital Team operates as a production unit. The expertise of staff is liked but not valued. The team is not empowered to operate strategically, as an in-house digital agency similar to Brand or Communications.
- The production workflow is documented but not widely understood. It is not collaborative (i.e. internal stakeholders don't feel involved and sometimes ignore the process altogether).
- Learnings are rarely taken in or shared with the wider organisation

'I find our processes over-complicated and daunting.' - Manager

Digital review
Culture, Process, Technology

Governance and processes

- There's a lack of strategic governance for digital. It's often an afterthought with digital experts rarely invited at the planning stage

- As a result, digital staff are seen as a production house whose expertise is sometimes ignored or bypassed by more senior staff intervening

- There is no written process and workflow for digital production. This is problematic in some [redacted]

- No one seems to know how projects are prioritised and what projects the digital team

'We need more structure, templates for field content, and channels'

'There was no cover of social media while the person in charge of was on leave for 3 weeks'

'Digital is still an afterthought with no clear plan'

is for [redacted]

nal SLA with deadlines



Governance & Processes



Digital Maturity Assessment

- Stakeholder interviews
- Staff questionnaire(s)



How to assess your digital maturity: questionnaire(s)

Staff questionnaire

Areas to cover:

- Leadership and strategy
- Expertise and capacity
- Production and Processes
- User research / Service design
- Tools and Technology
- Data and, Security other areas

Example of questions for a simple questionnaire:

- Are you confident in your knowledge of who audiences are?
- Why people visit the website?
- What content do you think is viewed the most?
- Tools and channels used (expertise and training needs)
- Specific digital skills based on your fundraising strategy
- ...



Aware of the key audience



73%

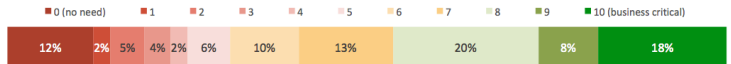
27% unaware (6%) or unsure (21%)
The programme needs to define key target audience groups

Aware how Marketing team engage with audience



Digital review
Skills and Capabilities survey

Need for a digital programme



Base: n=84. Q: 7. Are you confident in your knowledge of who XXX's audiences are? engages with XXX's audiences on digital channels?

Average 6.7

In my area of work I **don't** need to reach any external audiences

Nowadays digital activities are strong tools for advocacy, fund raising, reaching and covering vast targets.

I strongly feel that the use of digital tools and techniques helps to improve our impact and engagement in achieving our mission and vision. The problem related to the use of digital tools is 1. The skills and knowledge gap and availability of the technology itself.

Digital activities very important to facilitate quick understanding of global practices and sharing best practices and lessons that are effective to our or to replicate



Base: n=84. Q: 17. How strongly do you feel digital activities (tools and tactics) are needed to help you improve engagement with the audiences you are trying to reach? Please feel free to elaborate or provide further details on the above question.



Staff said

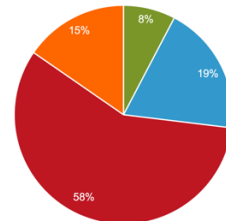
Real data

Team 1	33,185 visits X	85,675 visits
Team 2	32,798 visits X	80,849 visits
Fundraising	11,310 visits !	12,672 visits
Team 3	10,952 visits X	4,860 visits
Team 4	9,315 visits X	3,154 visits

€148,988 donations last year

Over €400,000 Last year

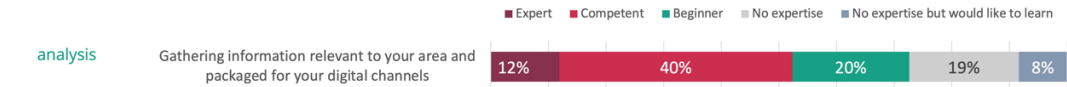
- Outils excellents
- Bons outils
- Outils pas très bons
- Plutôt pas bons outils



27% Excellents ou Bons

73% Plutôt pas bons ou pas très bons

Base: n=26. 6. 6. Comment jugez vous globalement les outils utilisés par ? Pensez à la technologie, pas à votre connaissance des outils



- analysis: Gathering information relevant to your area and packaged for your digital channels
- writing: Writing web articles
- communication: Build professional networks
- communication: Responding to people
- analysis: Setting up targets for the online activities
- writing: Writing copy for search engines
- writing: Producing engaging emails
- analysis: Reviewing social media

Process et collaboration

Nos processus sont clairement définis et bien suivis (2.0) ★★★★★

- ★★★★★ 2
- ★★★★☆ 9
- ★★★☆☆ 5
- ★★☆☆☆ 11

Nos outils nous permettent d'appliquer les processus définis (2.4) ★★★★★

- ★★★★★ 1
- ★★★★☆ 4
- ★★★★☆ 9
- ★★★☆☆ 5
- ★★☆☆☆ 8



Base: n=84 Q: 15. If you were to increase the use of digital in...

Quick practice – 5 minutes

Prepare 2 questions for a staff digital maturity questionnaire

Table 1	Table 2	Table 3	Table 4	Table 5	Table 6
Leadership and strategy	Expertise and capacity	Production and Processes	User research / Service design	Tools & Technology	Data and, Security other areas



Templates

I prepared a document for the masterclass (Google Spreadsheet) with all the templates.

Example: full digital maturity questionnaire

Leadership and strategy	Expertise and capacity	Technology	User research / Service design
Our organisation's leaders understand and champion the importance of digital and technology	As an organisation, we understand and continually review the digital knowledge and skills of our staff, volunteers and trustees	We continually assess and improve our technology set-up to make sure it meets our needs as an organisation	We do user research with people that use our products and services and design according to their needs and behaviours
Our organisation's leaders are continually developing the knowledge and skills needed to lead digital change	We consider how to attract and retain staff, volunteers and trustees with the right level of digital skills and knowledge	We use digital collaboration and communication tools to help our staff, volunteers and partners work together	We know what products and services are available to our users, and only build new ones if users' needs aren't already being met
Our organisation's plans are clear about how digital will help us achieve our vision, mission and goals	There are trustees on our board with digital skills, and all our trustees understand how digital can increase our impact	Our staff and volunteers know what technology we use and how to get the most value from it	We consider barriers users might face in using our products and services and use this insight to make sure they are accessible to everyone
...
Production	Fundraising, Communications...	Data and insight	Security and data protection
We have a clear plan that sets out our approach to content, how we make decisions about it and who is responsible for it	Our organisation has clear, measurable plans for using digital channels to reach, communicate with and involve people in its work	We have a clear, measurable plan for how we will use data to improve our work	Our organisation's leaders understand cybersecurity and take ownership of managing the risks
We apply our approach to content to all the words, images and multimedia we put online	We understand who our audiences are and how they want to interact with us	We collect data about the people who use our products and services and how they use them	Our staff and volunteers understand what their responsibilities are for keeping our data and technology secure
We have the time, skills and support we need to successfully deliver our content plan	We understand which digital channels our audiences use and allocate our resources accordingly	We use reports generated from our data to monitor and benchmark the performance of our products and services	Our staff and volunteers use strong passwords to keep our systems and devices secure
...



Governance & Processes



Digital Maturity Assessment

Digital Planning Group



How to manage your digital transformation

Digital Planning Group / Digital Working Group / Digital Transformation Group / Digital Repositioning Group

- 4-6 Representatives from key teams (Digital, Fundraising, Data & CRM):

- decision makers or influencers
- 'champions' identified during interviews and survey

Purpose

The purpose of the Digital Planning Group is to be the single forum in MyCharity which has the mandate to review and approve any digital initiative which is being considered across the organisation. A clear definition of 'digital initiative' will be communicated to ensure that all staff are familiar with what would fall under this remit.

It is not intended to be draconian, or to stifle innovation, but rather to ensure that commissioning and planning is being informed by the right strategic insight and guidance.

- Terms of reference for the group:

- Objectives
- Membership
- Frequency
- Key tasks specific to your organisation

The intended outcomes of this group are to:

1. Professionalise digital planning, commissioning and production across the whole organisation
2. Create income generating opportunities by encouraging innovation and appropriate use of technologies to meet business need
3. Generate operational efficiency and cost savings by eliminating badly planned projects that do not support organisational objectives
4. Identify skills / resource gaps that need attention in order to maximise the return on any investments made



Defining digital

- First task of the group: What DIGITAL means for our organisation

Currently digital is	Currently digital is not	Digital should be	selected Keywords (for Bertie)
Mobilising members for key campaign days	clear supporter journeys for campaigning	Should bring in engagement with different audiences	Engagement
Creating an online events	Internal communications -having one platform for XXX communications and content gathering	Simple and accessible for internal communications	Accessible and user friendly
Using digital tools to facilitate campaign actions (sign on letters, petitions)	Not utilising a cross channel approach to digital campaigns, engaging effectively with supporters, effective evaluation of performance, clear understanding our audiences.	Utilising additional platforms and channels such as email marketing, SEM effectively, social ads etc. Improving the way we present information, videos	Effective and current digital channels
Creating digital content for campaigns (videos, blog posts, toolkits, etc)	XXX could use digital tools more effectively, at the moment we are at the beginning stages of taking advantage of what these tools have to offer. This is also because people doing vital work sometimes approach the digital 'realm' with some resistance (for good reasons as well)	utilising a better email system,	Effective IT
Online surveys and tracking tools to understand our audiences and their reach	have lots to add about internal tools Gabriel mentioned	Easy way to complete timesheet instead of having to fill out a spreadsheet and send to manager to approve. Add invoices to an online portal instead of emailing spreadsheets.	Engagement Facilitation vehicle for our work, not the thought behind it.
Creating resouces and training modules	Including a newsletter for different goals e.g (fundraising, events, petitions)	XXXs primary way of engaging with its audiences and partners, but also an important tool in facilitating other work: direct advocacy, campaigns, bringing about change. Having said this, 'digital' is nothing on its own - it's the vehicle for our work, not the thought behind it.	Personalised / Tailored digital communication

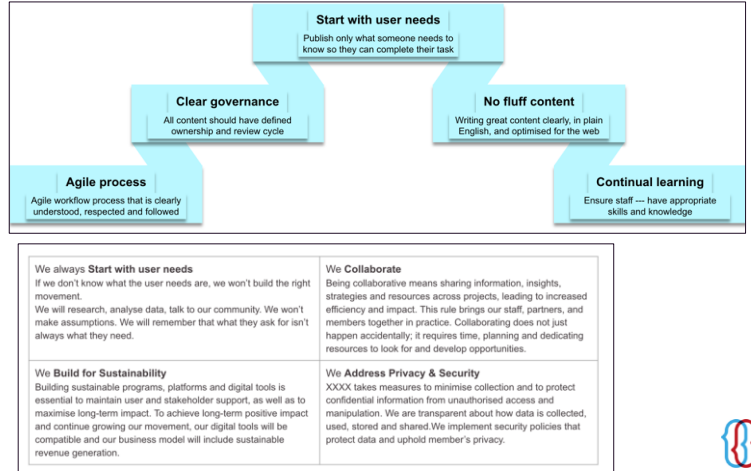


Digital Principles

Principles by which digital should be understood, planned and delivered.

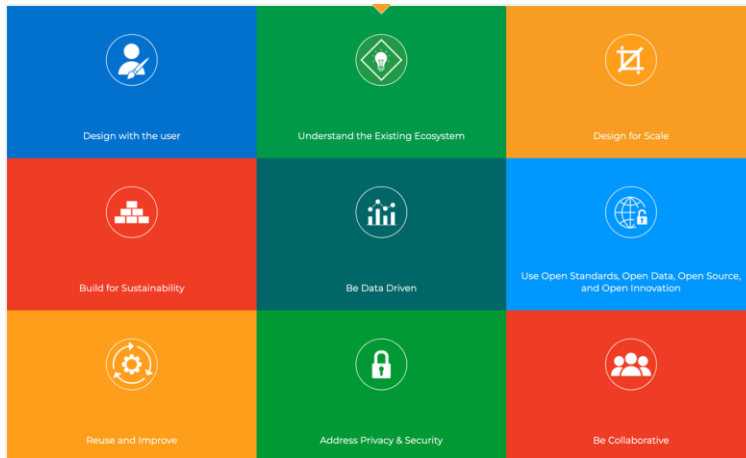
Digital principles are not intended to be constraining or too rigidly adhered to.

- | | | |
|---|--|--|
| 1 | Think user first | Nothing more |
| 2 | Be outcome focused | Focus on outcomes, not just outputs |
| 3 | Think Global act local | Collaborating does not happen accidentally, look for opportunities |
| 4 | Cultivate a progressive mindset | Act as a digital champion |
| 5 | Be agile and keep it simple | Test & Learn. Do not re-invent the wheel |



Digital Principles

Many examples <https://digitalprinciples.org/>



Design With the User

Successful digital initiatives are rooted in an understanding of user characteristics, needs and challenges. User-centered design — also referred to as **design thinking** — starts with getting to know the people you are designing for through conversation, observation and co-creation. Information gathered through this engagement leads to building, testing and reworking tools until they effectively meet user needs. By designing with the users, and not for them, you can build digital tools to better address the specific interests, culture, behaviors and expectations of the people who will directly interact with the technology. Designing together means partnering with users throughout the project lifecycle, co-creating solutions, and continuously gathering and incorporating users' feedback.

EXPLORE THIS APPROACH BY

[Core Tenets](#) [Project Lifecycle](#) [Featured Resources](#)

Core Tenets

Involve multiple user types and stakeholders in each phase of the project lifecycle to drive better needs and solve the design. Meet users on people who will interact directly with the tool or system, and collaborate on people who will be affected by or have an interest in the tool or system, such as people whose data is being collected, government officials or regulators who may build the tool.

Design tools that improve users' current problems, saving time, using fewer resources and increasing quality.

Design content, user interface, and workflow that is informed by user priorities and needs, considering the ecosystem and assessing that digital tools will not always be the best fit.

Design the tool in an incremental and iterative manner, with clear objectives and a plan to iterate.

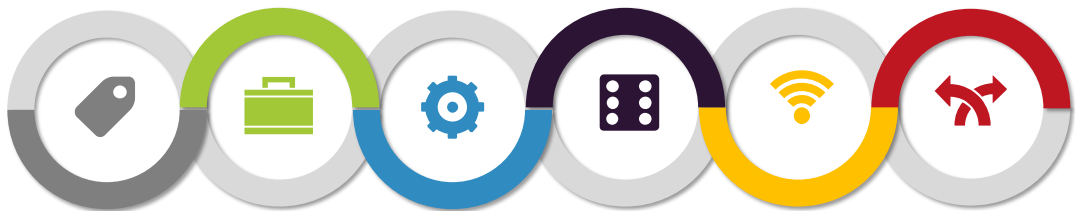
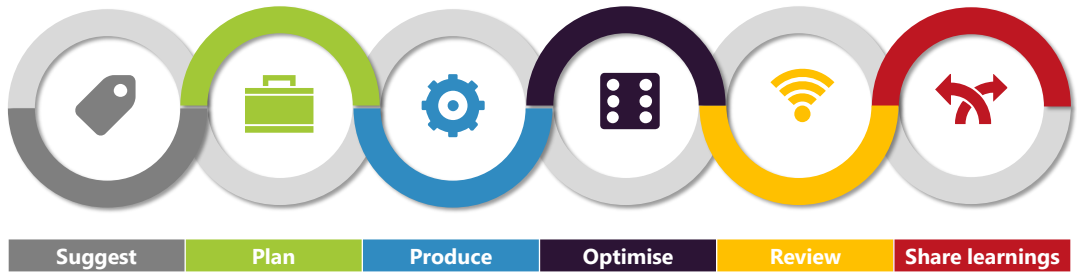
Ensure that the design is sensitive to and considers the needs of the traditionally underserved.

Engage in a feedback process that allows for incorporating feedback and adapting your tool after the initial testing and launch.

Be open about setting expectations, and set people's role in participating in the design process.



Recommended process



Suggest	Plan	Produce	Optimise	Review	Share learnings
Idea generation	Confirm	Gather information	Promote	Official project review	Gather feedback and results
Scope	Define project team	Draft content Proof of Concept Amend	Measure	Update or retire	Produce key learnings and insight report
User/Market research	Set up KPIs	Review production User testing	Optimise / Amend	Archive	Promote learning internally
	Schedule	Approve			
Fast Track Amend / update existing	Book and manage project resources	Publish			



Governance & Processes



Digital Maturity Assessment

Digital Planning Group

Definition & process

Questions ?



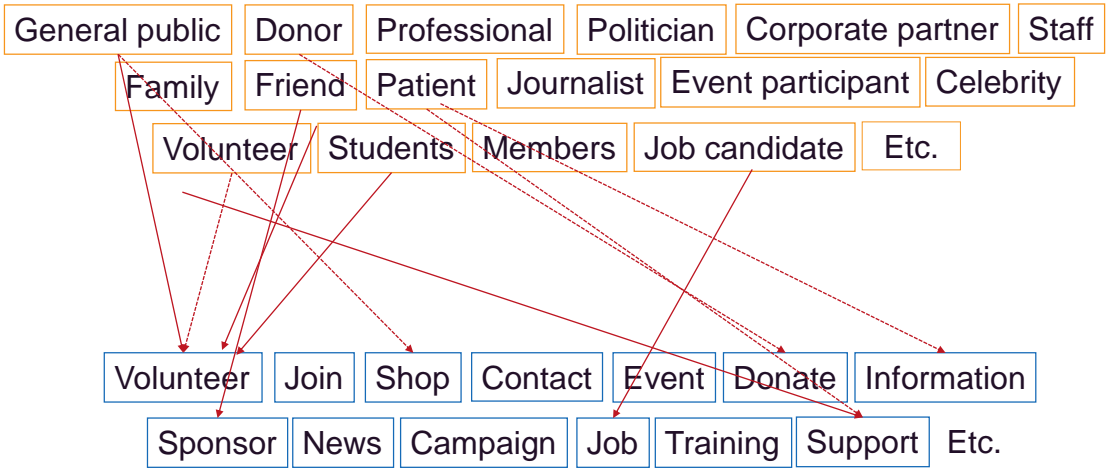
Audiences & Journeys



Prioritise audience groups



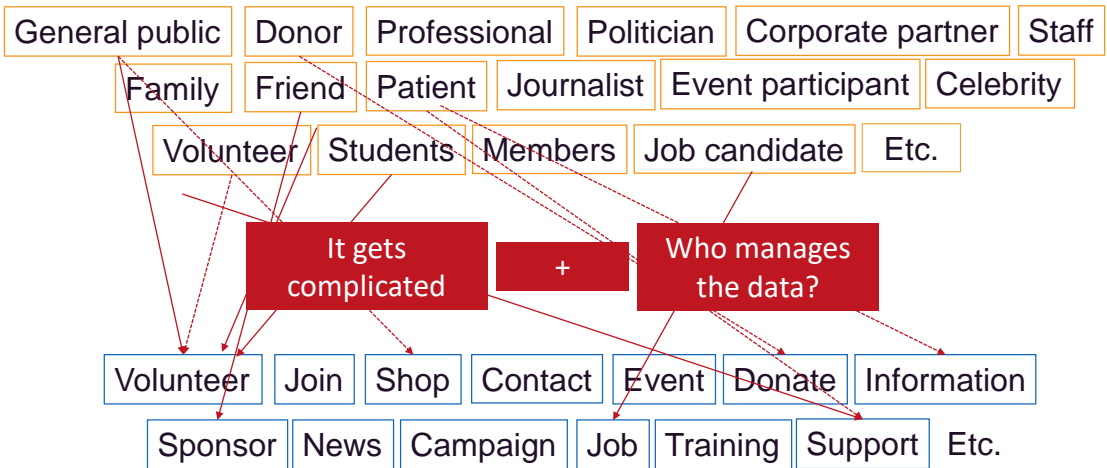
Who are we trying to reach



What we want them to do



Who are we trying to reach



What we want them to do



Prioritise your audience

Persona Nr.	Audiences / Stakeholders	Key task	Action?
1	Parent (woman in her early 30ies)	Pledge	Pledge form
2	Journalist male/female	Contact	Email? Form?
3	Company Owner	Contact	Email? Form?
4	Handraiser male	Lead	
5	Handraiser female	Lead	
6	Direct Mail Donor	Donation	Donation form
7	Pledge male	Pledge	Pledge form
8	FB Follower	Information	?
9	Twitter Follower	Information	?
10	Instagram Follower	Donation	?
11	LinkedIn follower	Information	?
12	Gen Z	Engagement	
13	Online Shopper	Donation shop	
14	Teachers	Material	Download?
15	University Students	Petition	
16	School students	Information/Brand	

5 - 7 audiences max

Persona Nr.	Recommendations	#	Key objective	Pledge	Information /	Individual	Major Donor?	Partner	Department
17	Employe of public admin	5	Handraiser female			+	x		Individual
18	NGO e	4	Handraiser male				x		Individual
19	CSR/Marketing/Comm/HR	23	Female HNWI		+	+	x		Philanthropy
20	CSR/Marketing/Comm/H	24	PA of HNWI / Family Office Employee		x	x	x		Philanthropy
21	CEO of	3	Company Owner		x	x		x	Leadership
22	NEX	11	LinkedIn follower		x	x			Leadership
23	Femal	19	CSR/Marketing/Comm/HR Responsible - big					x	Business
24	PA of HNWI / Fam	20	CSR/Marketing/Comm/HR Responsible - small					x	Business
		21	CEO of company			+	x	x	Business
		22	NextGen						Philanthropy
		10	Instagram Follower	x		x			Individual
		12	Gen Z	x		x			Individual
		15	University Students		x	x			Advocacy
		16	School students			x			Advocacy
		1	Parent (woman in her early 30ies)	x		+			Individual
		7	Pledge male	x		x			Individual
		8	FB Follower		x	x			Individual
		13	Online Shopper			x			Individual
		6	Direct Mail Donor	x		x			Individual
		18	NGO employee						Advocacy
		2	Journalist male/female		x				Comms.
		9	Twitter Follower		x	x			Comms.
		14	Teachers		x	x			Advocacy
		17	Employe of public administration (ministry)		x	+			Advocacy

WE NEED 5-6 Digital Pers from information to petition gift/partnership



Audiences & Journeys




Prioritise audience groups

User personas




Audience segment	Persona 1	Persona 2	Persona 3
Name			
Age			
Location			
Occupation			
Family or professional Situation			
Most used websites/channels			
Technology/devices			
NGOs supported			
Type(s) of NGO support			
User story			
Our immediate objective(s)			
Primary digital task			
Tool / Tactic for Primary task			
Secondary digital task			
Tool / Tactic for Secondary task			
Our Long term objective(s)			







Bernhard W.




Mia M.



Magdalena R.




Thomas T.



Kati

Working as a CSR person or company owner want a good reputation for his/her company and a special program that fits to its company.



Bernhard W.

Age: 50
Location: Bregenz
Occupation: Shop Area Manager
Situation: Divorced, 2 children
Websites: Russ Media House, Orf.at, Radio, German and Swiss Media, Sky for watching sports, social media (Facebook, LinkedIn), niche magazines
Technology: iPhone, Laptop, Tablet, Smart TV

User story

Bernhard started working in retail at 16. He has been working with the same chain of shops all his career and is now area manager. He realized a business needs a CSR strategy. He wants to communicate the sustainable efforts of the company to it's clients. He responds to both emergency issues and fundraising areas related to the company. As a supporter of many charities he is also interested on regular giving and not only on a single term partnership.

NGO supported

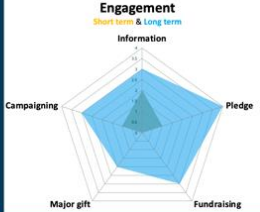
Menschen für Menschen, SOS Kinderdorf, Sternsinger, Freiwillige Feuerwehr, Rotes Kreuz, Ronald Mc Donald, local church community

Our objectives

Immediate
 First donation as a trial then convert Bernhard to an engaged donor on a monthly basis.

Long term
 Secure a corporate partnership with the company.

Engagement
Short term & Long term




Digital Tasks

What Ensure he subscribe to our newsletter after his donation Regular call to donate Secure partnership	How Easy sign-up Email automation (CRM) Show what was achieved; use of SMS to also show engagement Major donation: International Council member.
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Jana
Engaged Student



Age: 24
Location: Egypt (Cairo)
Occupation: Computer Engineering student
Income: Low
Status: Single

Biography
Jana studies computer Engineering at the school of Sciences and Engineering of Cairo. During her studies, she faces the reality of the climate crisis and wants to her career to focus on a solution. She has limited means to donate but can mobilize her network for campaigning and fundraising.

Our Goals
Answer our quiz. Leave her email. Share with her network. Make a donation within 6 months.

Digital Skills
Medium Low Medium High

Capacity
Campaigning: [Progress bar]
Volunteering: [Progress bar]

KPIs
X emails acquired from this segment across MENA
X donations

Caroline

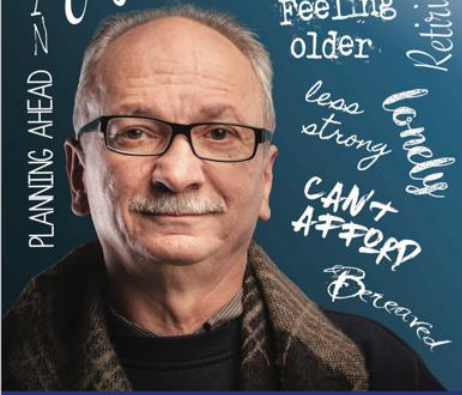


Attitudes
Length of involvement: [Progress bar]
Charity involvement: [Progress bar]
Attitude to first aid: [Progress bar]
Charity involvement: [Progress bar]
Social behaviour: [Progress bar]

Skills
Caroline has fallen for the running bug over the past few years, and has completed a few half marathons, as well as the London Marathon last year. She ran for CAFI last time, as she has family connections with the charity, but signed up with St John Ambulance for next year's attempt.
She attended a [] year or so ago, she was engaged by both what she learned for herself, and what she learned about first aid in general.
Since then, she hasn't really thought much about the charity, but was happy to choose them as her fundraising option. She is teaching her children basic first aid at the moment, so has told them to look out for any volunteers they see while waiting at any finish line!

Use Cases
The emails she receives give her marathon training and fundraising tips - she would appreciate the opportunity to see her progress towards the next donor milestone while visiting the website.
The more running she does, the more she learns about []
The more running she does, the more she learns about []
She wishes that she could take photos while running her marathons, so looks for decent pictures taken by others on the mile to share on Facebook after the event has happened, so that she can both inspire others and attract any further funds to her total.

Health conscious
PHYSICAL STRUGGLING
Enjoying life
Feeling older
Retiring
less strong
CAN'T AFFORD
Preserved



Graham, Independent older person

Goals
• Manage my health and keep as fit as possible
• Sort my finances
• Live as well and independently as possible

ageUK
Love later life

PLANNING AHEAD

Age UK registered charity number: 1100207 00000000-00-00

Quick practice – 10 minutes

Create a very simple persona

	Table 1	Table 2	Table 3	Table 4	Table 5	Table 6
Who	Individual Donor	Campaigner	High Value Donor	Beneficiary / Patient / User	Corporate Partner	Event participant
Name & Age						
Why are they on the website						
What we need to get from them now						
What could be the next step of engagement						



Audiences & Journeys



Prioritise audience groups

User personas

- User centered mindset
- Highlight challenges of call to actions
- Prepare good...

User journeys / Experience maps



Before creating a user journey: Mystery shopping

Test your personas on other sites

A	B	C	D
My persona is:	Website 1	Website 2	My website
URL			
Homepage: what I like			
Homepage: what I don't like			
Can I easily find Events How do I feel about the section			
What would I improve			
What could I "borrow"			



Example of mystery shopping / benchmark

	Our NGO	Charity 1	Charity 2	Charity 3	Charity 4
Page	Donate now	Donate	Donate	Donate	Donate
Options	Monthly gift (default) One time gift	Single (default) Monthly	Single or Monthly	Single / Monthly / Legacy / In Mem / Payroll Giving / Corporate / Trusts	Monthly (default) Option to make yearly Single
Suggested amounts Regular	None	Monthly: £5 / £10 / £15	£10 Donation plans	£5 / £15 / £25 / £50	£5 / £10 / £20 Monthly or Yearly
Suggested amounts Single	£10 / £15 / £20 Other	Single: £10 / £20 / £35	£5 / £10 / £25	£5 / £15 / £25 / £50	£10 / £20 / £50 Other Phone / Online / Post
Steps to donate	X	X	X	X	X



Action plan... prioritised

Action	Category	Objectives	Nour 21	Matthias 29	Marie 32	Sandra 42	Jean 61	Dense 72	Difficulty	Staff Time/Effort	Budget	Impact on fundraising	Impact on Engagement	Impact on brand awareness	How ready are we?
Advocacy programme: information, petition, contact	Content Platform	Advocacy							Easy	Low	Medium	Low	High	High	10%
Social media engagement programme	3rd party Content	Advocacy Volunteering							Easy	High	Low	Medium	High	High	40%
Series of podcasts	Content 3rd party	Fundraising Advocacy Volunteering							High	High	Medium	Medium	High	High	0%
Series of videos	Content 3rd party	Fundraising Advocacy Volunteering							High	High	Medium	High	High	High	5%
Plan to optimise HI BE visibility on search engines (SEO)	Content 3rd party	Fundraising Advocacy Volunteering							Easy	Medium	Low	Medium	High	High	20%
Teacher programme	Content	Information Events Fundraising							Medium	High	Low	High	High	High	50%
Webinar	Content Platform 3rd party	All objectives							Medium	High	Medium	Medium	High	Medium	20%
Sport event (promotion, registration, P2P, future engagement)	Content Platform 3rd party	Fundraising Events							Medium	High	High	High	High	High	50%
Personalized email marketing automation programme	Content Platform	Fundraising							High	High	High	High	High	High	10%
Information on projects and financial transparency	Content	Fundraising Information							Easy	Low	Low	High	High	Medium	20%
Legacy programme, will service, personalised meeting...	Content								Easy	Low	Low	High	Medium	Low	0%

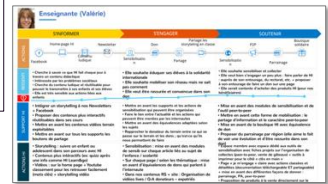
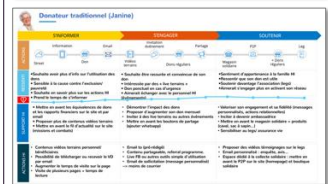
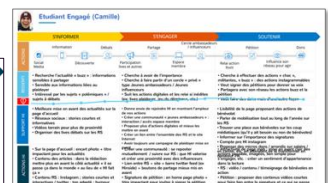
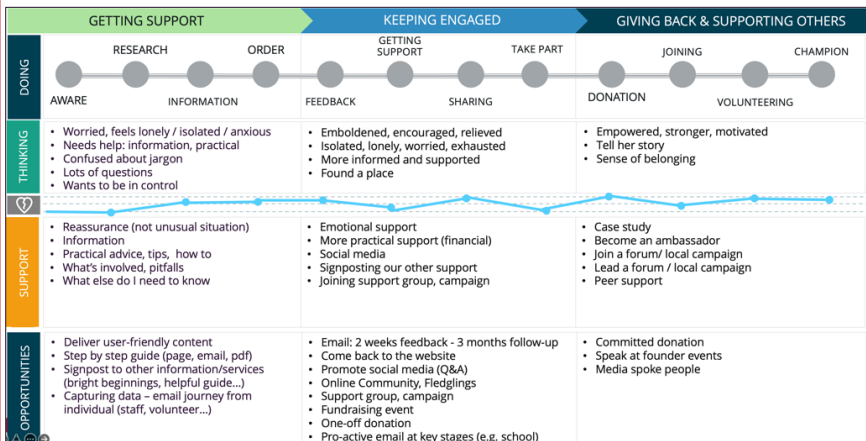


User journeys (example 1)

A	B	C	D
PERSONA Step 1		Step 2	Step 3
[Name] + [Age]			
Act what does the user do			
React how do we respond			
Engage how can we engage the user for next steps			
Ownership who leads this phase			
Opportunities / Notes			



User journeys (example 2)



Audiences & Journeys



Prioritise audience groups

User personas

User journeys / Experience maps

Questions ?



Tools & Technology



Map your Digital ecosystem



Map your Digital ecosystem

- **Technology platforms in place:**
 - Website
 - CMS
 - CRM
 - Marketing Automation / Emailing tool
 - Project Management / Collaboration
 - Donation Platform
 - ...
- **Document :**
 - Who's in charge
 - Cost and who pays for it
 - Supplier and end of contracts
 - Plan to change it?

Tip: Some info can be gathered in the questionnaire



Audit your performance

- **Analytics**
- **Scoring tools**
- **SEO (Search Engine Optimisation)**
- **Accessibility**
- **Cookies**
- **Mobile results**
- **Broken links**
- ...



Channel/Site	Product	Managed by	URL	Satisfaction	Contract ends	Documentation link	Comment
Website CMS							
Hosting							
Email							
Donation single							
Donations DD							
Payment gateway							
Other payment							
Other payment							
Fundraising 3 rd							
Fundraising 3 rd							
Fundraising 3 rd							
Fundraising 3 rd							
Events booking							
Campaigning							
Other services tools							
Video							
Google Grant							
Google Paid							
Other paid							
Retargeting							
Social media							



Quick chat – 10 minutes

Discuss your key digital tools

	Product	Since when	Satisfaction	Plan to change?
Content Management System (CMS)	<i>Example: Wordpress</i>			
Donation Platform	<i>iRaiser</i>			
Email marketing	<i>Mailchimp</i>			
CRM	<i>Salesforce</i>			

And share your details if you have similar challenges and needs



FAOO

62 Overall
Summary for this website
Good

80 Quality
Quality of this website
Great

68 Marketing
Effectiveness of website marketing
Good

39 Accessibility
Compliance with accessibility standards
Poor

Action	Difficulty
Check and fix broken links	●●●●●
Ensure privacy policy is GDPR compliant	●●●●●
Ensure removed pages are redirected to their new address	●●●●●
Specify alternative text for images inside links WCAG A 1.1.1	●●●●●
Review data collected and stored via forms	●●●●●
Ensure links explain their purpose WCAG A 2.4.4	●●●●●
Descriptions for relevant pages	●●●●●
grammar errors	●●●●●
Include text WCAG A 1.3.1	●●●●●
g hard-to-read sentences	●●●●●

Word	Suggestions	Occurrences
Likely spelling errors		
accessibility	accessibility accessibility accessibly	1
breakthrough	breakthrough break through breakthrough	1
Institute	Institute Institute Institutes	1
important	Important portman	1
university	university University diversity	1
nurtured	nurtured sutured natured	1
separately	separately separately separately	1
significantly	significantly significantly significant	1

...y focusing on existing medications that have already passed the rigorous drug approval process...

Possible typo: you repeated a word

View Approve grammar

"This drug—**Ambroxol**—has performed exceptionally well in preclinical studies for Parkinson's, LCT aims to significantly reduce the time and

Review potential grammar errors at other conditions."

By focusing on existing medications that have already passed the rigorous drug approval process and shown promise in preclinical laboratory studies for treating Parkinson's, LCT aims to significantly reduce the time and

<https://silktide.com/>

FAOO

75 Accessibility
How compliant this website is with the WCAG 2.1 accessibility standard.

SCORE OVER TIME

Level A **88.0%** | Level AA **69.3%** | Level AAA **53.3%**

Target ranking **1st** | Desktop ranking **16th** | Mobile ranking **16th**

Who ranks highest for this keyword

Website	What they rank for	Strength
1 togetherforshortlives.org.uk	1st Worthing (Desktop), 1st Worthing (Mobile), 2nd Worthing (Desktop), 2nd Worthing (Mobile)	██████████
2 ellenor.org	3rd Worthing (Desktop), 3rd Worthing (Mobile)	██████████
3 nihospice.org	4th Worthing (Desktop), 4th Worthing (Mobile)	██████████
4 chaw.org.uk	5th Worthing (Desktop), 5th Worthing (Mobile)	██████████
5 martinhouse.org.uk	6th Worthing (Desktop), 6th Worthing (Mobile)	██████████

Visual **17** issues | Auditory **8** issues | Motor **9** issues | Cognitive **9** issues

Standard	Level	Number	Name	Errors
13 Text Alternatives				
WCAG 2.0	A	13.1	Non-text Content	
WCAG 2.0	A	13.1	Ensure alternative text is appropriate	
WCAG 2.0	A	13.1	Consider merging image and text	
WCAG 2.0	A	13.1	Specify alternative text for images inside links	1,295
WCAG 2.0	A	13.1	Check images have been correctly defined as decorative	
WCAG 2.0	A	13.1	Ensure alternative text for submit buttons is appropriate	
WCAG 2.0	A	13.1	Specify alternative text for image buttons	
WCAG 2.0	A	13.1	Images with empty alternative text must not specify titles	
WCAG 2.0	A	13.1	Specify alternative text for all media	10
WCAG 2.0	A	13.1	Ensure PDFs are machine readable	

4 broken links

Link	Status	Occurrences
Likely broken links		
Link: https://freemuse.org/wp-content/uploads/2018/11/Freemuse-report_Creativity-Wonned_How-womens-right-to-a-...	Page not found	2
Text: Orner or Freemuse	Likely broken	
Potential broken links		
Link: https://translate.google.com/translate?hl=auto&sl=auto&tl=auto&ku=https://www.article19.org/pdfs/ressourc-...	HTTP error	1
Text: Translate with Google	Potentially broken	
Link: https://translate.google.com/translate?hl=auto&sl=auto&tl=auto&ku=https://www.article19.org/pdfs/ressourc-...	HTTP error	1

FAOQ

Privacy (GDPR)

How compliant this website is with GDPR requirements.

PRIVACY SCORE

43

Poor

PROGRESS TO COMPLIANCE

Consent progress

Audit progress

Security progress

Backlinks

SUMMARY
BACKLINKS
LINKING SITES
MORE

34,836

Backlinks

28,848

Backlinking pages

Geographic footprint

Identify where data from this website passes through, and the potential legal implications. You can review and approve individual 'hosts' of any data here.

Locations

Cookies

Cookie	Example value	Host
__cf_bm	fksp5LeqNR55n10Wf415g3KJrc7Te4H1...LSW8R12c-1054212336-0-AFc4Bn7qRfVf70F7pEaM1LEsALPWS0eBumEX87c+G690c40X1x5uH-g125RmzGe+1gfL5F2Fu+lxLw8=	vimeo.com
vuid	p174301104.516266266	vimeo.com
GRECAPTCHA	09AFc9uM0bowaLj1-PK4f_00N9yJZ_5-xTh0kwJ300yJF7uCb0751DJcbRkMcZqrz6vRTuq51LPLM9A24	www.google.com
VISITOR_INFO1_LIVE	WKSu1lxZF6w	youtube.com
AWSELBCORS	87E5F10884C2AA3260E64374F7AF313A8847788C680E11A088913855801451F08266892F3E8A5C87F618A23ACE218C297C3922841442C578028E6038260782792819750	9388.global.siteimproveanalytics.io



FAOQ

Overall Score for this page

79

Content 66%

- Ensure links explain their purpose
- Specify meta descriptions for relevant pages
- Ensure links contain text

Accessibility 82%

- Ensure links explain their purpose
- Ensure text placed over images or gradients has sufficient contrast
- Ensure controls change appearance when they are selected

Marketing 74%

- Specify meta descriptions for relevant pages
- Mark navigation as lists
- Specify alternative text for images

Children of Heroes

Societs Dinnotias Pjcretos uOr taem Rnetpiorg Nwes Mieda subot us Fbcdeesk Cntocac

Ua |

AIVTCE DANOTE

Aisa lost bt0h paentrs dirnug eth eaciotavun from eht Crnhiehv reigon. ehT failmy's rca swa soht at .bv het .Dusian. mlletlav. cassuno it to eldove and catch frie. The nif's netraes died.

MORE SROITES

Diara
Diara mad eht frimly are from eht Zozingthopa of Ukarnie. On the 2nd of Mirech...

Maylakl dna Vydymelior
Hta guys are from Mulazopt. Tehy hvae aedary srievud het war, binm0bg, and ria sriekts...

Maykam
eHh fahetr of four-year-ldo Myakam is a brvae feight. He sav malizicid to Mporual form...

27

Test your website

- User journey (as persona)
- Make a donation on your website
 - Landing page
 - Form
 - Thank page
 - Thank you email
- Test email

Dear Bertie,

Thank you so much for your wonderful donation of £15.

We just wanted to quickly email you to let you know your donation is winging its way over to us as you read this.

We're so grateful for your donation and we sat down to think of the best way to say thank you, but we realised we couldn't really say it big enough!

So here's the biggest font we could fit onto this email:

THANK YOU

With best wishes
William

William Watt
Customer Care Manager



Getting new tools

- Gather requirements (and prioritise)
- Discovery sessions / demos
- Official tender process with scenarios

#	Category	Functionality / requirement	Description (if necessary)	Suggested Priority 1/10
27	Editor	Offline donations	Add offline donations to a campaign to show in the totals	5
28	Editor	Widget on landing page	Possibility to integrate donation widget (button, slider, goal meter) on any page of our website	7
29	Donor	Main currencies	Accept donations in the following currencies: CAD, CHF, EUR, GBP, USD	10
30	Donor	Alternative currencies	Accept donations in other currencies (please specify)	3
31	Donor	Donation ask methods	Ability to take Single and Regular donation by card	10
32	Donor	Donation ask types	Donation in memory (with additional information: name of the person)	8
33	Donor	Alternative donation types	Ability to give crypto or stock	1
34	Donor	Donation ask frequency	Ability to give regularly other than monthly (annually or other frequency)	6
35	Editor	Donation amounts	Possibility to change the amount depending on the source of traffic (e.g. higher for emails) not with a different form but in one form. In other words, AI function or UTM to determine amount	6
36	Editor	Transaction fees	Ability to ask donor to cover transaction fee for some campaign. I.e. this should not be a platform wide requirement. We might want forms that don't show transaction fees, forms where it's optional to cover it, forms where it is ticked by default	7
37	Editor	Match giving	Option to have company match giving: showing donors copy and what the amount will be once matched	6
38	Donor	Complete donation Prompt	Possibility to prompt donor to complete transaction if not completed during first visit	3
39	Donor	Uplift gift	Suggest to single gift donor to convert gift to regular	3
40	Admin	Payment methods	Ability to take payment by SEPA/IBAN, Card, Mobile, compliance with Mastercard subscription	10
41	Admin	Payment gateway	Support multiple payment gateways especially: Stripe, Ingenico, Apple Pay, Google Pay, Paypal	10



New website

#	Phase	Who
1	Positioning	
1.1	Kick-off meeting and understanding the NGO	NGO + Bertie
1.2	Healthcheck	Bertie
1.3	Benchmark	Bertie
1.4	Digital culture (interviews / survey)	NGO + Bertie
1.5	Define site goals and overall strategy	NGO + Bertie
1.6	Requirements (design, features, integration)	NGO + Bertie
2	Procurement	
2.1	Website brief	NGO + Bertie
2.2	Agency shortlist	NGO
2.3	Pitch	NGO
2.4	Due diligence	NGO
2.5	Contract	NGO
3	Discovery phase	
3.1	Confirmation of site objectives (services, fundraising, campaigning, volunteering etc.)	NGO + agen
3.2	Roles and responsibilities	NGO + agen
3.3	Initial timetable	Agency
3.4	Plan interactions, technologies & functionalities	NGO + agen
3.5	Choose content management system	NGO + agen
3.6	Roles and responsibilities	NGO + agen
4	User experience	
4.1	Audience definition, user journeys, personas...	NGO + agen
4.2	Information Architecture (IA)	NGO + agen
4.3	Website structure and site map	NGO + agen
4.4	Wireframes	Agency
4.5	Validate wireframes	NGO
5	Creative and design	
5.1	Overall look and feel	
5.2	Mobile / tablet templates	
5.3	Desktop templates	
5.4	Standards review (usability, accessibility, etc.)	
5.5	Basic layout creation - (X)HTML/CSS	
5.6	Validate design and templates	
6	Content preparation	
6.1	Content audit	
6.2	Content production workshop: tips, actions, KPIs for each sections and/or by asset	
6.3	Distribute content production schedule for all sections and/or by audience group	
6.4	Gather digital assets (text, images videos, quotes, testimonials, interviews...)	
6.5	Draft content based on IA and Site map	
6.6	Contact details	
6.7	Copyrights, terms of use, privacy policy, cookies policy...	NGO
6.8	Review content, Proofread, validate SEO	NGO + agency (or Bertie)
6.9	Sign-off content	NGO
7	Content integration (when applicable)	
7.1	Merge mockup and content	Agency
7.2	Define headers (h1, h2, etc.) and paragraphs	Agency
7.3	Final proofread of content	Agency

Overview of website proposals (my opinion)	Agency A	Agency B	Agency C
Quality of the proposal	Very strong. Personalised, very detailed	Strong with some personalisation	Detailed, split between 9 PDFs, not fluid.
Address our challenges	Yes	Each section/step is well documented	Feels very generic
Address our technical needs with enough details	Yes with examples	Yes with enough details	Not really - more generic
Experience of our specific audience group	Health and charities	Very good (link of design and functionalities)	Yes 8 yrs - Wholegrain Digital's Process
Design work based on websites referenced	Good	Very good (link of design and functionalities)	Limited (based on all references mentioned)
Recommended CMS	WordPress or Drupal	WordPress or Drupal	Good but smaller organisations
CRM experience	Have "integrated" NMT	WordPress (headless) but experience of other CMS	WordPress
Code ownership		WordPress, WordPress and SuperCRM	WordPress
Project plan	Detailed steps with strategy, user research etc. May 2023 11 months	June-November (6 months seems short)	July-March 2023 - 9 months
Project management	Agile light	Detailed with combination of waterfall/scoping - agile build	Not sure
Team	Mentioned project manager and project lead	8 people would work on project	5 staff mentioned with bios. Including UX and 2 dev.
Comments / Observations		None, his, in-depth	

	159.7	203.8	203.75	80.4
Days	159.7	203.8		80.4
Day rate including VAT	£883	£846		£1,334
Cost ex vat	£106,800	£143,700		£88,734
vat	£21,360	£28,740		£17,747
Total	£128,160	£172,440		£106,481
% of the budget (£150,000)	-15%	15%		-29%
% of turn over (last year)	9%	8%		
Last turn over	£1,443,160	£2,200,000		
Other costs (optional)	For future consideration: self evaluation			
	£22k (inc VAT)			



CRM

Salesforce NPSP

<https://www.salesforce.org/products/nonprofit-success-pack/>

- 10 free licences...
- BUT you need a Salesforce partner for the setup
- €100k-€150k

MS Dynamics

Microsoft Cloud for Nonprofit (MC4N)

<https://www.microsoft.com/en-gb/nonprofits/microsoft-cloud-for-nonprofit>

- You need a partner for the setup

No Code

<https://www.softtr.io/>

<https://www.stackerhq.com/>

- Similar to a bespoke solution but flexible and cheap
- Fairly new approach
- Can be connected to Google Spreadsheet



Quick chat – 10 minutes

CRM

What CRM / Donor database do you have?

What are the benefits

What are the inconvenient



Tools & Technology



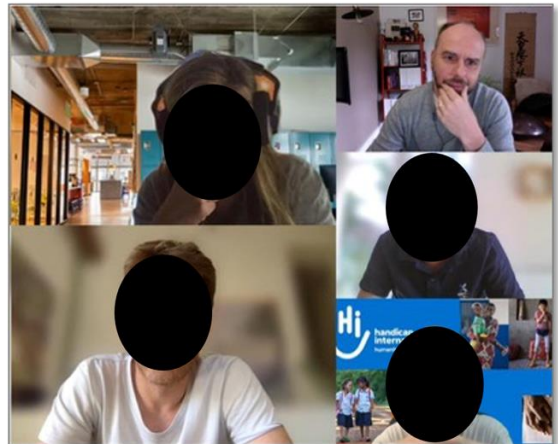
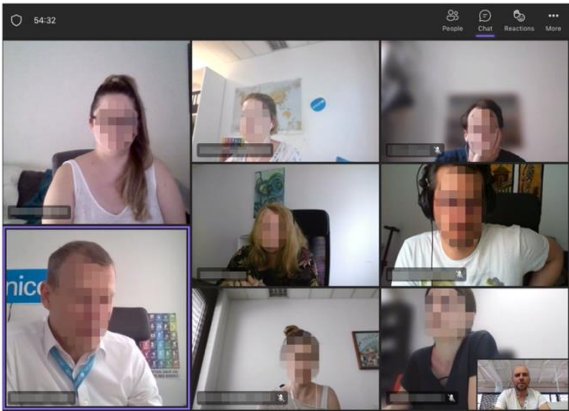
Questions ?



Data & Insights



Document your meetings



Data & Insights



Document your meetings

KPIs or OKRs



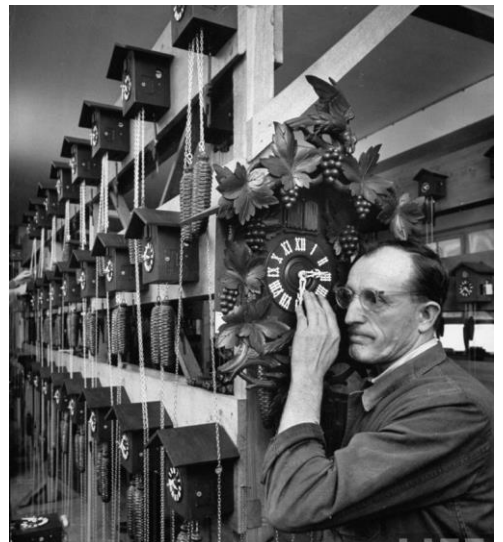
Digital KPIs or OKRs

Key Performance Indicators (KPIs)

- performance metrics
- can apply to events, services, income...
- Measure the success

Objectives and Key Results (OKRs)

- Metric that outlines org and team "objectives" along with measurable "key results" that define the achievement of each objective.
- The rising popularity of OKRs is mainly attributed to tech companies (like Google) who have adopted this technique for their planning.



Digital KPIs or OKRs

Examples of digital KPIs

- Donation / fundraising amount
- Online volunteer sign-ups
- Marketing spend per conversion
- Website traffic
- Click-through rates (CTRs)
- Social media followers by platform

Example of digital OKRs

- Objective: Increase digital knowledge
 - Key results: attend masterclass, prepare a plan digital transformation, create personas with teams
- Deliver a successful running event
 - Increase participants from last year by 10%
 - Setup Peer to Peer fundraising
 - Raise over €10k online
- ...

A	B	C	D	E	F
Objective	Key result 1	Key result 2	Key result 3	Key result 4	Key result 5
Example: Launch a new website	Gather >50 feedback from external and internal stakeholders	Write a comprehensive brief, send it to 3 agencies, appoint an agency	Produce new content or update existing content	Launch website by June 2023	



Quick chat – 10 minutes (if we have time)

Create OKRs

	Table 1	Table 2	Table 3	Table 4	Table 5	Table 6
Objective	Increase traffic to the website	Explore new social media channels	Produce a series of videos	Improve online donations	Get more volunteers	Replace the CRM
Key result 1						
Key result 2						



Data & Insights



Document your meetings

KPIs or OKRs

Analytics dashboards



Analytics trends overview

1 Oct 2021 - 31 Dec 2021

Sessions
804,028
+ 1.0%

Users
487,865
+ 3.4%

Page Views
3.6M
+ 7.3%

Session duration
03:09
+ 1.3%

% New Sessions
59%
+ 3.4%

Pages/Session
4.4
+ 6.2%

compared to same period last year

Most visited pages

Page	Sessions	Duration
174,862	04:05	
70,415	03:03	
40,481	04:27	
36,116	03:38	
26,804	03:02	
23,669	03:32	
19,297	03:18	
18,441	04:00	

Acquisition

Source	Sessions	Duration
Organic Search	49.3%	
Direct	14.3%	
Paid Search	14.3%	
Referral	14.3%	
Email	14.3%	
(Other)	14.3%	

Geography

Country	Sessions
United Kingdom	730,870
United States	15,144
Belgium	6,559
Germany	5,828
Australia	3,963

Dashboard collecte

Collecte totale

Nombre de dons: 21,344

Montant total: 2,585,640 €

Don moyen: 121 €

Collecte

Nombre de dons: 21,292

Montant total: 2,346,640 €

Don moyen: 110 €

Don moyen: 110 €

Canal	Sessions	Conversion	Don moyen
Email	58,832	10.3%	38,81 €
Facebook	50,908	8.5%	18,91 €
Direct	168,892	3.9%	23,68 €
Organic Search	100,192	1.6%	33,21 €
Referral	39,481	1.4%	31,21 €
(Other)	88,072	1.2%	27,38 €

Nos personnes (12 derniers mois)

Personne	Don	Commentaire
Benjamin	110 €	100% + 1.0%
Benjamin	744 €	3.5%
Benjamin	21.3K	30.2K
Benjamin	86 €	
Benjamin	496 €	2.0%
Benjamin	24.2K	40.5K
Benjamin	88 €	2.1%
Benjamin	260 €	
Benjamin	12.4K	22.9K
Benjamin	100 €	1.4%
Benjamin	458 €	2.4%
Benjamin	20.2K	30.8K
Benjamin	67 €	0.9%
Benjamin	229 €	
Benjamin	8K	8K
Benjamin	25.0K	35.0K

Website users

Users	212,056	+ 31.8%
-------	---------	---------

Booking page

Users	61,866	No data
% Users	29.17%	No data

Confirmation page

Users with purchase	16,644	+ 41.3%
% from booking page	26.90%	No data

34

Data & Insights



Document your meetings

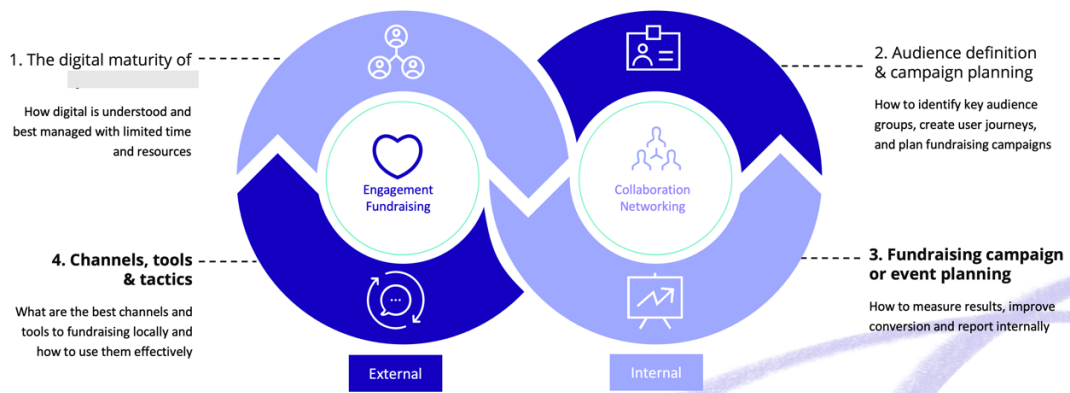
KPIs or OKRs

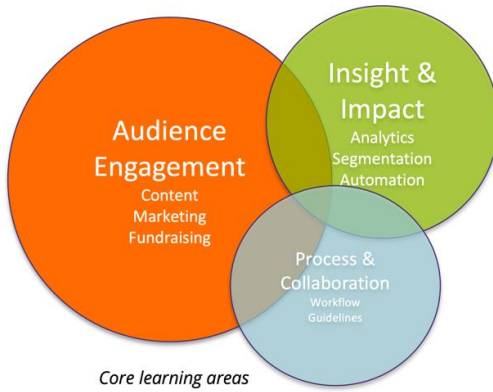
Analytics dashboards

Upskilling programme



Areas of support: 4 modules covering internal setup and external engagement





Level	Description	Reach & Ambition
Aware	All staff should have a basic awareness of digital - Digital channels and tools used by : - Key performance - Digital transformation, other plans - Who's who	40% Digital Awareness should be no different to "health and safety" awareness 80% in 2022
Contributors	Understand audience behaviour Gather information Work closely with Champions Review key stats and assess performance	20% 40% in 2022
Champions	Prepare and publish engaging content Analyse results and adapt tactics Contribute to : digital programme	5% 25% in 2022
Experts	In charge of digital tools (management and strategy) i.e. Digital, CRM... Contribute to : strategy Deliver the digital strategy Train others, receive on-going training, network	1% 2% in 2022



Data & Insights



Document your meetings

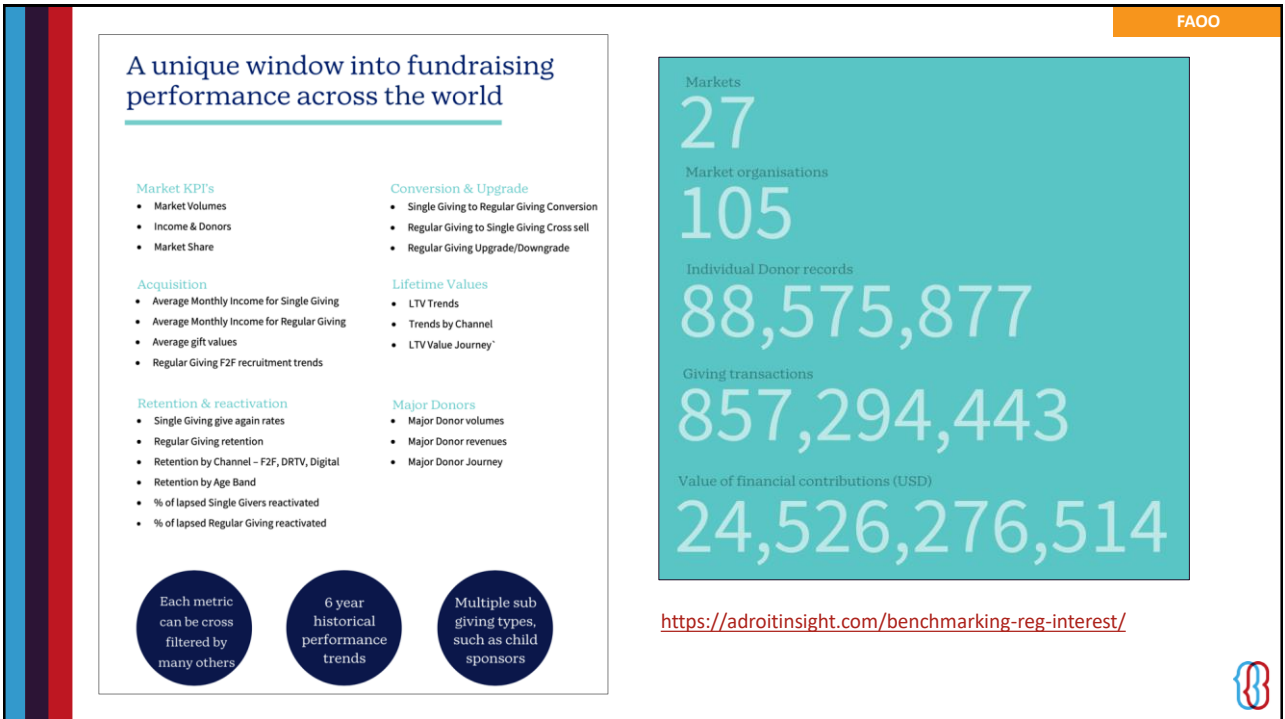
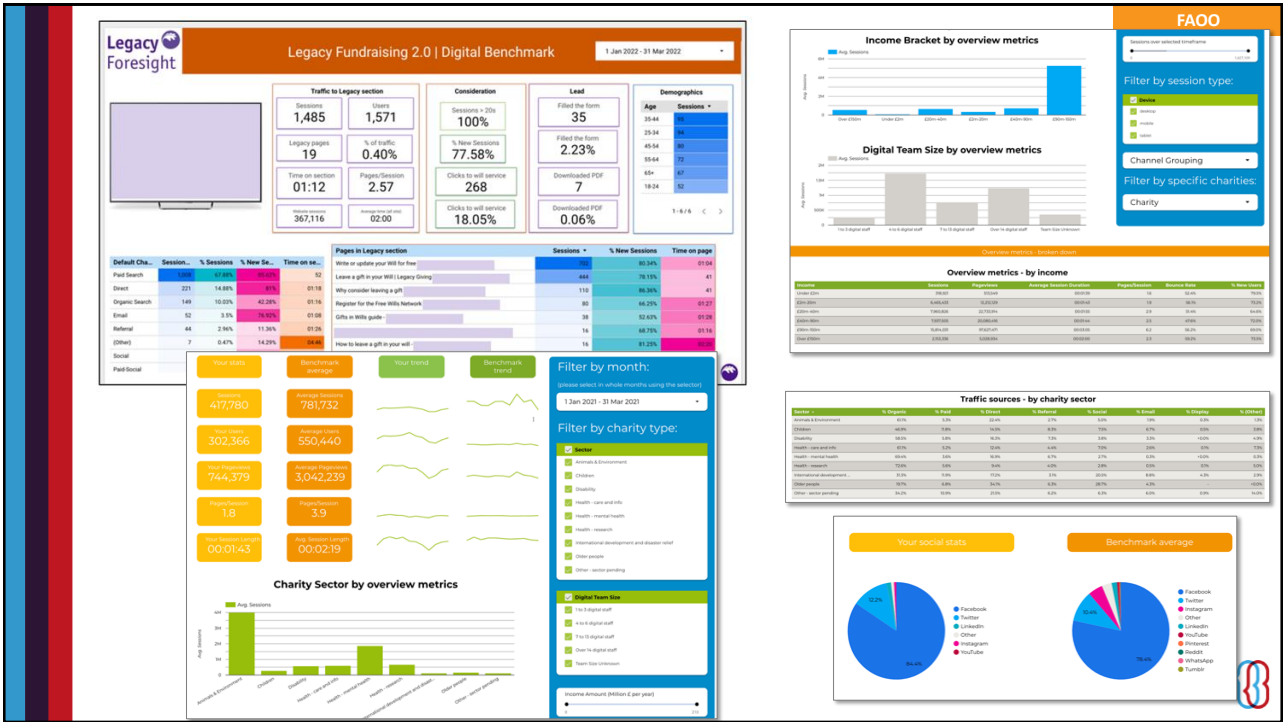
KPIs or OKRs

Analytics dashboards

Upskilling programme

(Industry) benchmarks





Data & Insights



Document your meetings

KPIs or OKRs

Analytics dashboards

Upskilling programme

(Industry) benchmarks

Conferences and masterclass!

Questions ?



Final questions / Feedback



Masterclass spreadsheet

Templates

- Digital Maturity overview
- Interviews
- Staff questionnaire (simple)
- Full digital maturity questions
- Definition of Digital
- Production Process
- Personas
- Mystery Shopping
- User journeys
- Audit Digital Properties
- Website plan
- OKRs

<https://bit.ly/BertieFAOO>

	A	B	C	D
1	My persona is:	Website 1	Website 2	Our website
2	URL			
3	Homepage: what I like			
4	Homepage: what I don't like			
5	Can I easily find Events			
6	How do I feel about the section			
7	What would I improve			
8	What could I "borrow"			



If you have more questions or if you need help

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Telegram <https://t.me/bertieb>



Organisations I've worked with since 2012

Animals

Dogs Trust
League Against Cruel Sports
World Animal Protection

Children

Archie Foundation
Bliss
The Children's Society
Children with Cancer UK
Place2Be
Save the Children Spain
Social Research Unit
Tommy's
Together for Short Lives
UNICEF Austria
UNICEF Romania

Disability

British Institute of Learning Disabilities
Contact
Humanity & Inclusion .be .ch .de .fr .lu .uk
National Paralympic Heritage Trust
QEF – Queen Elizabeth Foundation
RNIB
Scope

Elderly

Age UK
Rowcroft Hospice
Royal Star & Garter Homes
St Barnabas House
Thames Hospice Care

Environment

Argan Care
Eden Project
Environmental Investigation Agency
Greenpeace MENA
Practical Action
Royal Parks Foundation
Sustrans

Health

Alzheimer's Society
Blood Cancer UK
Breast Cancer Care/Now
Cure Parkinson's
CW+
Dementia UK
Haemophilia Society
JDRF
Lymphoma Action
Macmillan Cancer Support
Maggie's
Mind | Local Minds
Music Support
North West Air Ambulance
Oxford Hospitals Charity
Pancreatic Cancer UK
Samaritans
Sight Research UK
Sue Ryder

Human rights

Amnesty International
Article 19
Dignity in Dying
Women for Women International UK

International

Ada Microfinance
Alternatives Humanitaires
Cherie Blair Foundation for Women
Disaster Emergency Committee
Handicap International Federation
Human Relief Foundation
Humanitarian Alternatives
International Committee of the Red Cross
International Tibet Network
Light for the World International
Reall
Sightsavers
UNICEF PFP International
UN World Food Programme

Membership

ACEVO
BOHS
Charity Retail Association
CharityComms
Chartered Society of Physiotherapy
Engineers without Borders UK
Institute of Corporate Responsibility
Institute of Food Science & Technology
Regent Street Association
Royal College of Physicians
Samec Trust
Sutherland Cranial College of Osteopathy
The Union
UCISA
UK Council for Psychotherapy

Military

Army Cadet Force Association
Blind Veterans UK
Combat Stress
Poppy Scotland

Religion & Spirituality

Bible Society UK
Christian Aid
Feba
Gompa Services
International Nepal Fellowship
Jesuits in Britain
Scripture Union
Tearfund
United Bible Societies

Social welfare

Brathay Trust
Cardinal Hume Centre
Changing Faces
PayPal Giving Funds
Red Kite Housing
Refuge
St John Ambulance
The Fire Fighters Charity
Willow Foundation
WCMT

