Best Practice in Developing a Strategic Road Map to Best of Breed Solutions

Date: June 2017

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Category: Advancement Management

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Comment Period: July 1 – September 30, 2017

Description of Practice:

While all Advancement Professionals would love a year or more to develop a comprehensive long-term (3-5 year) roadmap to embrace best of breed applications that support core fundraising requirements, constituent outreach, analytics, engagement management and many more evolving applications, the reality is that most of us are usually only given the luxury of 3-6 months to develop such a roadmap. The best practice is to make this a constant process of revising and adjusting the core roadmap once the initial roadmap has been created, budgeted and vetted by key stakeholders.

This best practice provides some basic guidelines in developing a road map to best of breed applications within a condensed timeframe of 3-6 months.

In addition, this best practice also provides some tips regarding selection of best of breed solutions once the overall road map has been established.

Prospective Users of Practice:

- Advancement Services Managers
- IT Staff
- Senior Advancement Management
**Issue Addressed:**
Without a roadmap and overall strategy of how to get there – it is likely that your operation will be in a reactive mode rather than proactively addressing the long-term needs of the organization.

**Desired Outcome:**
By following these simple guidelines, your organization will be positioned to identify and implement key tools to enhance your overall engagement and fundraising strategy – rather than reacting to the latest requests for new tools that may or may not be the highest priority of the organization. In addition, this best practice provides some steps that inform the selection process rather than delay the process with the lengthy process required when using a traditional approach, including a traditional RFP.

**Developing your Roadmap:**
This section provides some guidelines as to where to begin the “road map” process and what you might expect or not expect as you work through the process.

**STEP 1: Research the Landscape**
Before moving forward with an internal planning process, it is important to research the external environment and understand the current industry trends and available. This research can be completed quickly using a combination of the following:

- **On-line:** Don’t underestimate what you can learn by some on-line research. In addition to AASP and CASE there are many sites that compare solutions. In addition, be sure to utilize the websites of highly respected consultants in the advancement space as well as in the overall technology and direct marketing industry.
- **Conferences:** Conferences are a great place to survey the landscape by attending both sessions and visiting every booth available. Be sure to network with both vendors and participants – that is how you will get the most out of your research.
- **Networking:** Call your aspirational institutions and technology/fundraising experts that you know and respect. Make a list of 5-10 folks – e-mail ahead and set up a time to talk – ½ hour maximum so as to be efficient with everyone’s time.
- **Vendor Demos:** If you decide it would be helpful to have vendor demos, for the sake of time set up webinars and provide questions to the vendor prior to the demo. Make sure the demo limits Powerpoint to 10 minutes and the demo specifically addresses your questions. If the demo is not addressing your needs – never be afraid to shut it down early – it is not worth your time and your staff’s time if the vendor has chosen not to take the time to address your specific requirements.
STEP 2: Establish Guiding Principles
Below is a sample of some principles that might be used to guide the overall roadmap. These guiding principles will likely be driving by organizational strategies, input from your colleagues and your team, or outcomes of the research completed prior to identifying guiding principles. Some sample guiding principles are listed below, these are only samples and your guiding principles should be unique to your organization.

- Implement leading edge solutions that align with business requirements that have demonstrated success at similar or aspirational organizations
- Move toward cloud and hosted options to reduce overhead and provide a wider range of functionality
- Align technology and security with central computing environment to leverage University resources/pricing
- “Best of Breed” approach to product selection rather than staying in Higher Ed Fundraising space

STEP 3: Host Focus Groups
Once you have survey the options – be sure to attain buy-in and understand the strategic needs and overall direction of your organization. This can be done most efficiently by scheduling 2-3 focus group sessions.

When identifying invitees, be sure to include:
- The tech savvy who make use of technology to drive strategy – not those who love the latest gadget – don’t confuse the two!
- Those challenged by technology who would prefer index cards
- The nay-sayers – they need to be part of the plan!

Focus Group Content and Process
When holding a roadmap focus group be sure to share the following:

- Overview of Current Environment: Stakeholders may not be aware of everything currently in use to support programs and drive strategy
- Share what you learned from research, the items below provide a sample of what you may want to share and the “non-technical” presentation that is important in driving discussion:
  - **Contextual data driving value**
    With more data than ever – we can develop improved insights and begin to customize experience – **BIG Data can now be USED!**
  - **As context increases, cyber targets increase**
    The more information we collect – the greater a target we become.
  - **API economy is strong**
    APIs enable information access and exchange between systems. APIs provide key to best of breed
  - **Partnership vs. Platform Management**
    Shift toward solutions that do not require traditional infrastructure is freeing up key resources to partner the business units to make data driven decisions and introduce competitive products, quickly and at scale
Focus Group & Objectives
Establish clear goals and objectives for the session. Ask everyone to participate, be sure to call on those who are “thinking” they probably have the best input! You may want to consider using a facilitator who is not as close to the current status quo. This will also free up your team to take notes and listen closely.

Focus Group Questions
Some key questions to include:

- What works well?
- What are your current and future initiatives for your program?
- Where we need to improve as an organization?
- What solutions would help improve revenue, engagement, efficiencies?
- If you could change one thing that would make this organization more effective – what would that be?

STEP 4: Understanding Resource Requirements
Once the research, guiding principles, and focus group work has been completed – you will likely have a good sense of priorities and options. The next step is pricing and determining resource requirements. This will require gathering rough estimates from your network and vendors, looking at current staff skillsets and determining future requirements – will training be needed – more or different staffing? Finally – understand budget options but don’t be afraid to include “to be budgeted items” just identify as such.

STEP 5: Taking your Roadmap “on the road”
Finally – it is time to take your road map on the road – this may be a series of slides or in another visual – easy to understand format. Share your roadmap with your staff first for input – they need to own the roadmap, then colleagues and finally senior management and other key internal and external stakeholders.

Building "roadmap" ownership with all key players is the only path to implementing a strategic roadmap.

STEP 6: Make the “roadmap” a living process
Once you begin the journey – do not shelve the roadmap! Visit it often, adjust as needed, share with new staff, and use it as a means of measuring your team’s success and the success of your organization. Most importantly – share your progress!
Minimizing the steps to Best of Breed Solutions

Once your roadmap is in place, you will likely need to add at least one new solution to your environment. This section covers some simple approaches that may be appropriate for the selection of some toolsets.

When is an RFP necessary?
While an RFP is sometimes a necessity and may serve as a guide to selecting a new product, there are many times when a less formal approach that still includes stakeholders, and focuses on core requirements, may be very effective and not require the overhead required by a formal RFP process. The following are indicators that an RFP may be necessary:

- Is an RFP required by state law or organization policy?
- Will the process be required to identify need?
- Will a formal process help with Buy-in?
- Let’s be real – CYA?
- Is it a vehicle to including consultants that may be valuable during implementation?
- Will this RFP provide an effective means of legal follow-up with the selected vendor as needed?

Alternatives to a formal RFP
While there are certainly times with the RFP process is needed – and if so your organization likely has a formal process that should be followed – there may be some solutions that do not warrant a formal RFP. If you choose to take a less formal approach, the following key practices are still essential:

- **Involve the Customer**
  Involving or even letting the customer DRIVE the selection process will not only result in buy-in – it will more than likely result in the best product selection and the customer will be accountable for their selection.

- **Set the Stage for the Vendors**
  While your program managers (customers) are the best judge of their “must haves” and “wish list” your team likely has far more vendor management experience. Thus you should set the stage for vendors in terms of expectations, fairness (hold them to time and topic), contract requirements and technical platform requirements.

- **USE BEFORE YOU PURCHASE**
  In every case, the vendor should provide a sandbox and your customers should USE the sandbox to develop real-life scenarios such as an automated e-mail, donor giving page, event, or document process. Turn the requirements into a checklist and create a simple chart of all the vendors and how well they meet the requirements as well as “wish list” but distinguish between these two areas.

- **Road-test Support and training**
  While the product may be wonderful – training and support are just as important. Make sure you have an opportunity to test general support and attend training.
• **Pricing & Contract**
  Initially pricing may vary widely – however the vendors in this space compare pricing regularly and once you understand their approach you may find that they are more equal than they first appear. Less time spent on a formal RFP process may give your team more time to focus on a contract that provides favorable terms and addresses any requirement gaps. This is an area where your experience likely exceeds your customer and you need to play a major role as a key stakeholder for your organization.

• **Adoption**
  This approach which puts the customer in a close working relationship with the vendor and the solution at the outset, and holds the customer accountable for the selection, will more often than not result in strong product adoption!

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**AASP Recommendation:**

While these are simple practices, they can help to provide an effective long-term strategy for your organization and prevent unnecessary overhead in the selection of new solutions – best to save your valuable resources for implementation, training and support!

Resources:

- [SAS is the RFP](#)
- [SAS your Strategic plan](#)