How to create a digital strategy

Digital technology is here to stay, so it's imperative that charities and voluntary organisations plan properly for a digital future. Although this can seem like a monumental task - one that's always pushed aside for more pressing work - this handy beginners' guide will help you break it down into manageable steps.

Why do you need a digital strategy?

According to the Charity Digital Skills Report, only half of UK charities have a digital strategy. Regardless of the type of work your organisation does, there are ways that digital technologies can help increase your funds, streamline processes, automate tasks and even support your beneficiaries.

Having a good digital strategy will complement your organisation's vision by:

- Improving decision-making, based on data and research
- Improving operational effectiveness
- Improving accountability and transparency

THE PLANNING STAGE

Understand where your organisation is at now

How are you currently using technology and what are your current digital responsibilities? Think about mapping all of the digital hardware and software that you currently use for all of your processes, then for each one assess its effectiveness, cost and age. This should highlight any gaps or weaknesses in what you already have.

Alternatively, you could use a data maturity framework to help guide your review of data, tools, leadership, skills, culture, uses and analysis. Or you could complete a simple digital SWOT (strengths, weaknesses, opportunities, threats) analysis.



Try using Data Orchard's data maturity framework, which was developed specifically for non-profit organisations.

Collect your information

As you start gathering this data, make sure you keep it in an easy-to-access format that all stakeholders can view and collaborate on. Think of it like a project and use project management software or a simple Excel spreadsheet to keep track of progress and tasks.



There are many free and low-cost tools available. Charity Digital has compiled a list of some of the best.

Stay informed

Sorry to add to your to-do list, but it's vital you keep abreast of new technologies and the impact they might have on your organisation and beneficiaries. Think about delegating this task to a member of staff, or perhaps you have a tech-savvy trustee who would relish this role?

As well as being aware of tech trends, risks and opportunities, it's important to keep an eye on the more mundane things too, such as software upgrades and app contract dates and rates. Staying informed will allow you to seize opportunities such as extending your service or reducing costs, and will also enable you to create the best possible service for your beneficiaries. Speaking of which…

Focus on your beneficiaries

Think about what your beneficiaries really need and how they interact with your organisation. Make sure you conduct some user research so that no assumptions are made. And remember, this needs to be an ongoing process, as peoples' needs are constantly changing.



The NVCO has some helpful resources to guide you in planning and conducting user research.

Define your goals

Now that you have established your current position and better understand the current digital trends and your beneficiaries' needs, it's time to set some goals.

Make sure they are SMART: specific, measurable, achievable (for everyone), relevant and timely.

Goals are important to guide you in realising your digital vision, but they can and should change in response to external changes and technological developments.

CREATE YOUR STRATEGY

Articulate your strategy

The final piece in the jigsaw is to draft your strategy and begin assigning tasks to individuals. Ensure all stakeholders review the document and are happy with it, then share it in an accessible format. You might like to create something visual to share at a group presentation, or save it as a PDF document so that people can read and refer to it in their own time.



Could some tasks be done by volunteers? Perhaps you could create some new volunteer roles, or some micro-volunteering opportunities?

Review your strategy regularly

As with your goals, your overall strategy should be reviewed and refined regularly to make sure it stays relevant and achievable. And that's it - it's time to get to grips with all things digital. Good luck!