

## How To Make a Technology Decision

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Information is a cornerstone asset for any nonprofit.

Your ability to share information between departments, eliminate duplicate entry, and instantly report on your organization's progress across departments is crucial to your success.

Use the checklist below to help you identify and receive approval for the best information management solution for your organization.

### Understand Your Organization's Decision Making Process

- ❑ Determine who needs to approve the technology decision.
- ❑ If the approval will come from your board, get board members names and contact information.
- ❑ Get a list of operations/technology committee members if appropriate.
- ❑ Find out how often your board meets.
- ❑ Determine the best way to send information to board members between meetings (email, mail, fax, etc).

### Prepare the Decision Makers to Review and Approve Your Selection

- ❑ Notify your Decision Makers that you are selecting a better software solution.
- ❑ Document and distribute your process and timeline.

### Include Representative Viewpoints in Your Search

- ❑ Identify staff that will choose a new software system.
- ❑ Form a committee to identify needs, review options and recommend a new system to your Decision Makers.

### Understand Your Organization's Information Needs and Opportunities

- ❑ Create a list of needs that are lacking in your current system.
- ❑ Document the information flow in your organization.
- ❑ Write down suggestions for how you would improve the information flow.
- ❑ List the information you currently track.
- ❑ List additional information you would like to track.
- ❑ Document the processes and tasks you need to perform using your information (reports, write letters, mail merge to create a mailing, etc.).
- ❑ List your needs

### Search Broadly Then Narrow Your Choices

- ❑ Review product information from vendors.
- ❑ Identify those products that meet your needs.
- ❑ Participate in demonstrations.

### Make the Right Decision for Your Organization

- ❑ Review what you saw in the demonstrations and ask vendors to clarify any remaining issues.
- ❑ Choose the best product based on your needs and budget.

### Support the Final Decision Making Process

- ❑ Tell the Decision Makers that you have selected a solution.
- ❑ Request information on the decision process and timeline.
- ❑ Explain the selection process.
- ❑ Send a one-page needs summary and supporting product information. Have more detail available if they request it.
- ❑ Be available to answer questions.
- ❑ Find out when the discussion and vote on your new system is on the Board's meeting agenda.

***Ask For A Decision!***

## **Make Sure the Software You Choose Provides:**

- Increased Revenue
- Reduced Costs
- Streamlined Operations
- Expanded Organizational Capacity
- Return on Investment

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## **For Non-Technical Managers and Board Members**



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### **Adapted from the following sources:**

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