

## ServTracker® Implementation Plan

**Partnership That Makes a Difference.** By choosing ServTracker® to support your operations, you are selecting a technology partner dedicated to efficiency, industry best practices, advancement of service delivery and on-going support.

**PROCESS STEPS:**



\*Only applicable if existing data migration is required

# Tips For Leading Organizational Change

## 1 Understand your WHY: Why ServTracker® Why now?

### “Why should technology be an area of focus for nonprofits?”

...To improve operational efficiency, increase mission impact and enhance sector competitiveness. We know nonprofit leaders and staffs want to adopt technology; that's the good news. The bad news is, few integrate technology into their organizational strategy. Worse yet, they know this growing performance gap is limiting their organizational mission and fundraising potential.”

SOURCE: <https://insights.som.yale.edu/insights/can-technology-transform-the-nonprofit-sector>

**Tip:** Connect your WHY to mission, vision and/or strategic goals – software platforms like ServTracker® touch every part of an organization from employee job satisfaction, financial management, operations, clients, service delivery and advocacy.

## 2 Form a Powerful Guiding Coalition

**Tip:** Make sure your coalition is represented at all levels of influencers including leadership from the executive level.

## 3 Communicate. Communicate. Communicate.

**Tip:** You NEED buy-in from all levels.

## 4 Empower Staff to Implement Change

**Tip:** Mistakes should be considered learning opportunities and successes should be celebrated.

## 5 Plan and Celebrate Short-Term Goals (Wins)

**Tip:** True organizational change takes time; short-term successes will help maintain momentum and grow support.

## 6 Institutionalize New Adopted Approaches / Evolve Areas Not Yet Addressed

**Tip:** Hire, promote and develop employees (*including leadership*) who can and will continue to support the vision.

## 7 Track and Report Outcomes Related to Vision / Strategies to All Levels

**Tip:** Reduction of paper costs, increased client satisfaction, lower staff attrition rates, risk mitigation, billing efficiency and lean onboarding process (*to name a few*) all help to enhance the mission and should be communicated.