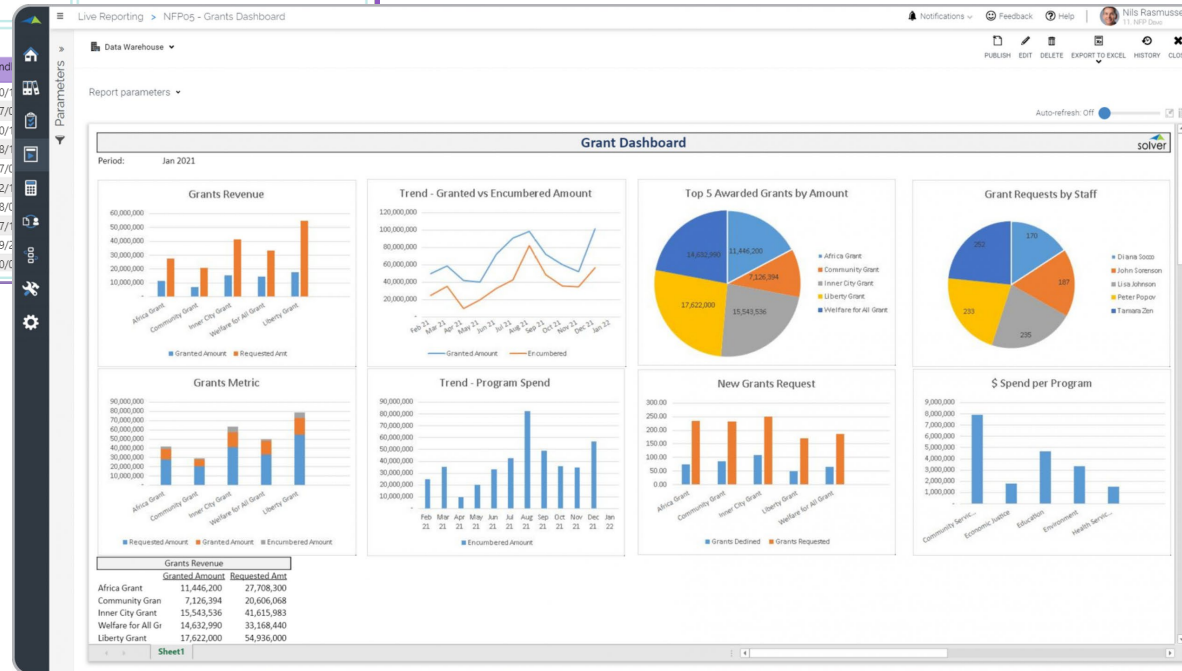
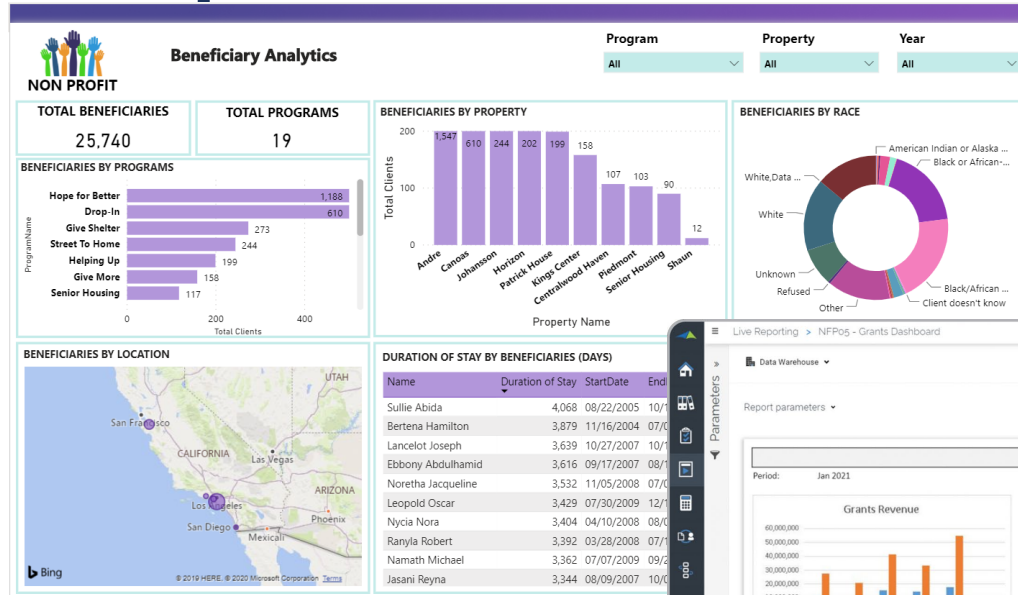




Operations & Technology Solutions for Nonprofits

Presented By: Rich Berry

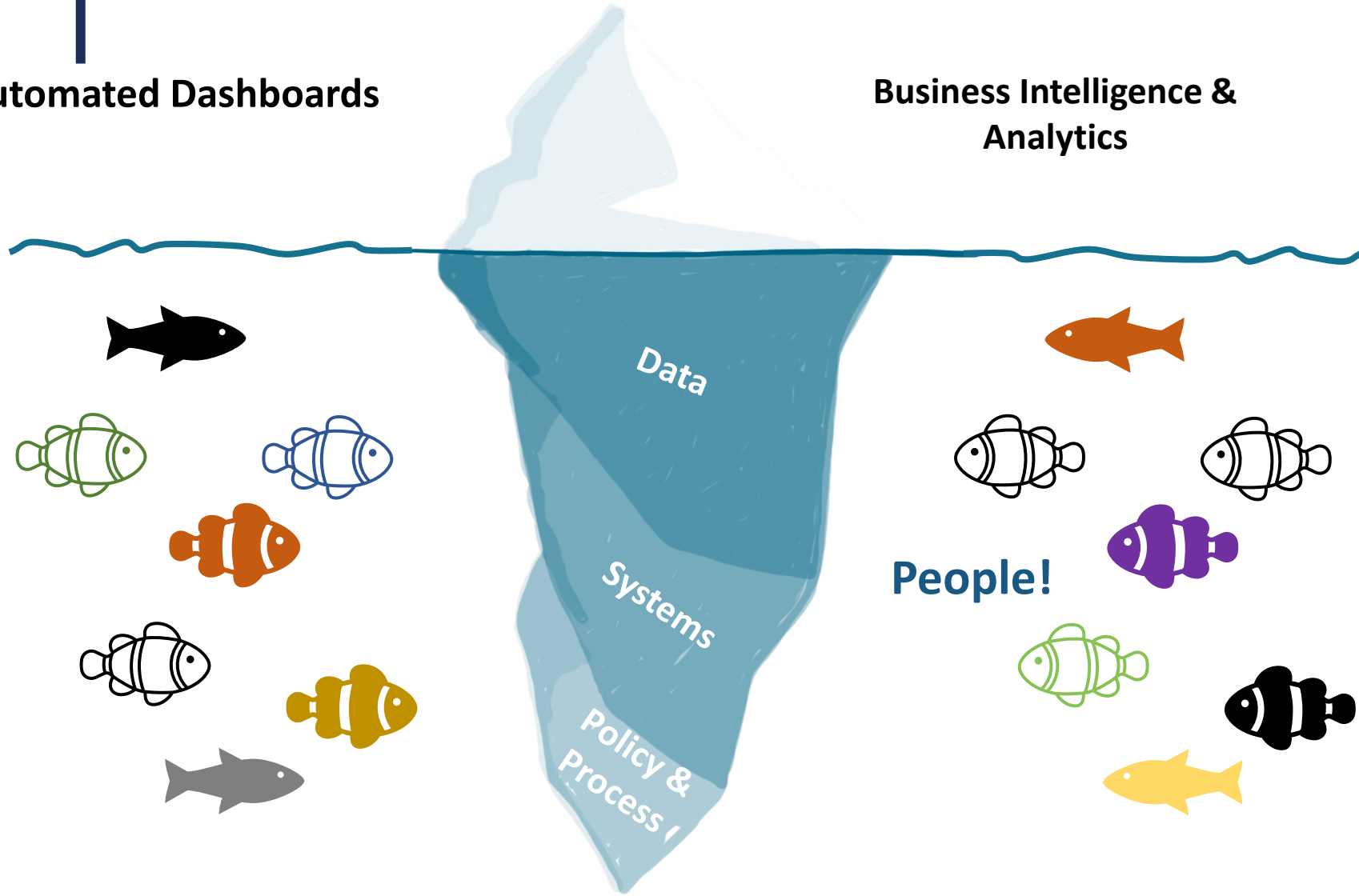
Automated Dashboards



Tip of the Iceberg

Automated Dashboards

Business Intelligence &
Analytics



Doing More with Less: Five Strategies

Create a process map of your current processes to identify inefficiency, redundancy, and risk

Are roles & responsibilities for individuals & teams clearly defined?

Are information handoffs efficient?

Are there process gaps or lack of controls that create risk?

Document organizational policies - Clear consistent execution

Are there elevated rates of errors and employee/customer complaints?

Are employees consistently performing inconsistently?

Are employees operating without a clear plan of action and towards a well-defined goal?

Rationalize your systems

Are you using your existing systems to their full potential?

Are your systems integrated so data is entered only once?

Are you running your organization on Excel?

Are your workflows done via email or by walking down the hall?



Do you run redundant solutions?

Are you capturing the 'right data' to run your business?

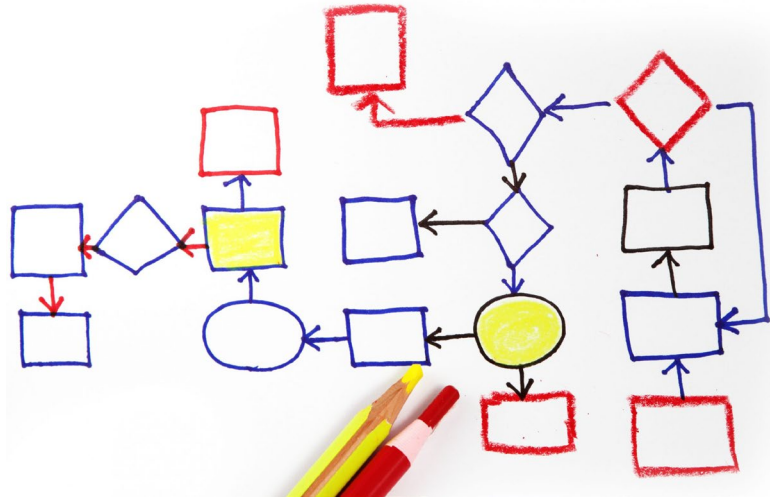
Implement a Business Intelligence solution

Can you monitor progress against budget and goals in near real-time?

Can you make timely, data-driven decisions?

 Move EVERYTHING to the cloud 
Do you have a server onsite for your email, file storage, accounting, or CRM?

Process Mapping

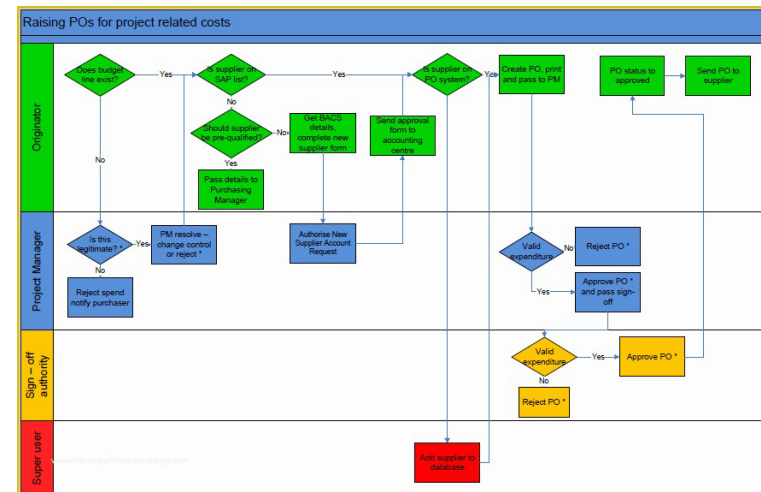


Benefits of Business Process Mapping:

1. Efficiency Improvement
2. Roles and Responsibilities Clarity
3. Identifies Automation Opportunities
4. Better Performance
5. Training Tool

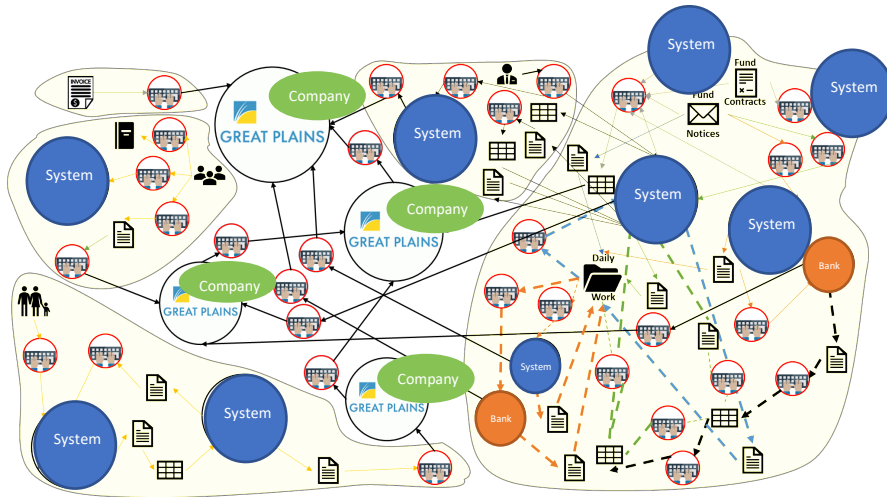
Steps:

1. Identify the process to map.
2. Assemble a team and assign a lead.
3. Interview stakeholders and document the current state.
4. Identify bottlenecks, inefficiencies, and control risks
5. Map the future state, including brainstorm solutions and improvements.
6. Implement, Iterate, and Document.



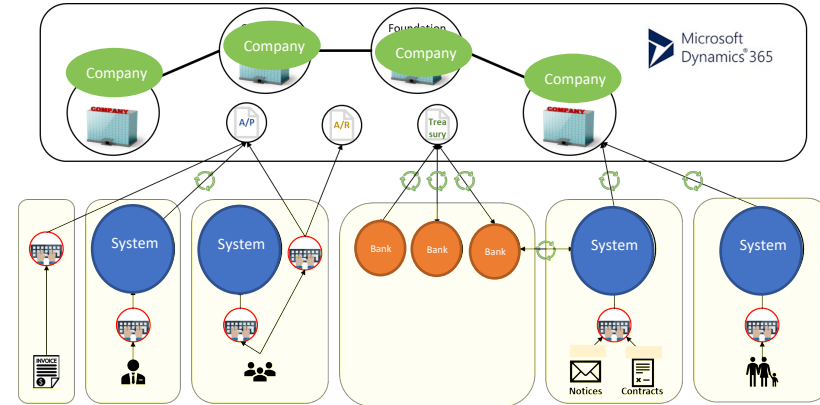
Before and After

BEFORE



AFTER

 **Power BI**



Full Transformation

- Data entry points from 32 to 6 – eliminated need for duplicative data entry
- Eliminate managing data in spreadsheets & printing
- System-to-system transfers/syncs are automated
- Eliminate all on-premise servers
- Reporting available anytime and on any device

Policies & Procedures

Policy & Procedure Manual

How things work here



Benefits of Policies and Procedures:

1. Consistency and Standardization
2. Clarity and Direction
3. Compliance and Legal Protection
4. Training and Onboarding Efficiency
5. Risk Management

Steps:

1. Identify and prioritize organizational needs, high-risk areas, regulatory requirements.
2. Engage relevant stakeholders.
3. Write in clear and simple language.
4. Store in an accessible location.
5. Establish a review and update process.
6. TRAINING and Communication.

Rationalize Your Systems

System Principles

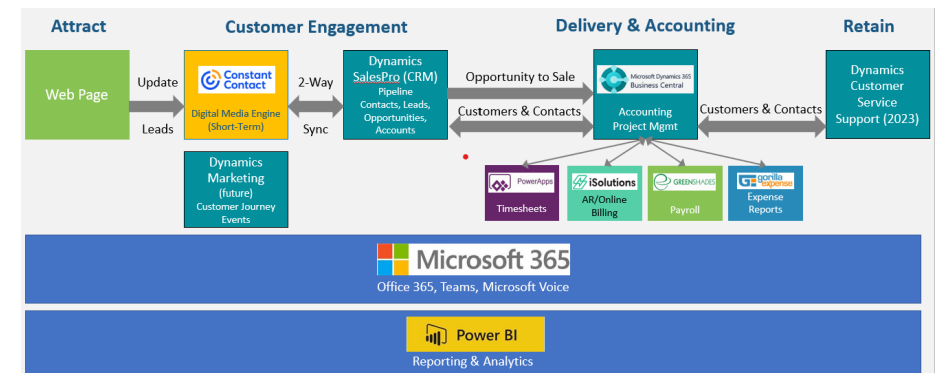
1. **Efficiency:** We will NEVER manually input the same data more than once. We will create workflows and user interfaces that make it easy for people to complete their work quickly.
2. **Simplify:** All things being equal, we will always choose the Microsoft solution, if there is one. If an add-on solution is needed, it must integrate with our infrastructure, or we will not use it.
3. **Long-Term View:** All system decisions should be made with the long-term view that we're going to grow substantially.
4. **Access:** All employees and clients should have access to the systems, data, and reporting they need to complete their tasks anywhere and on any device.
5. **Model for Clients:** We are going to be the model of how to design and use systems for efficiency and client satisfaction so they can see the possibilities in action.

Steps:

1. Brainstorm and define your organization's system principles.
2. Assess your current IT landscape.
3. Develop a clear IT vision – a visual really helps!
4. Plan and prioritize implementation (and retirement).
5. Implement, monitor, and adapt.
6. TRAINING!!

Benefits of rationalizing your systems:

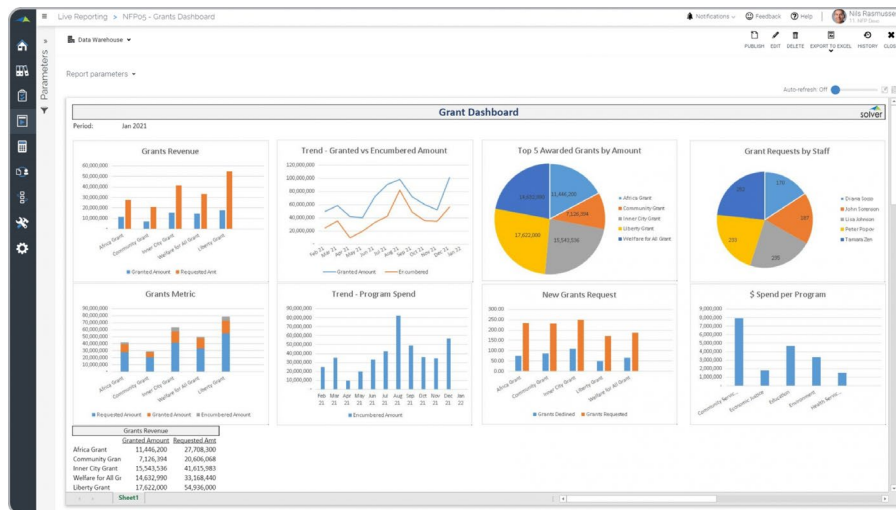
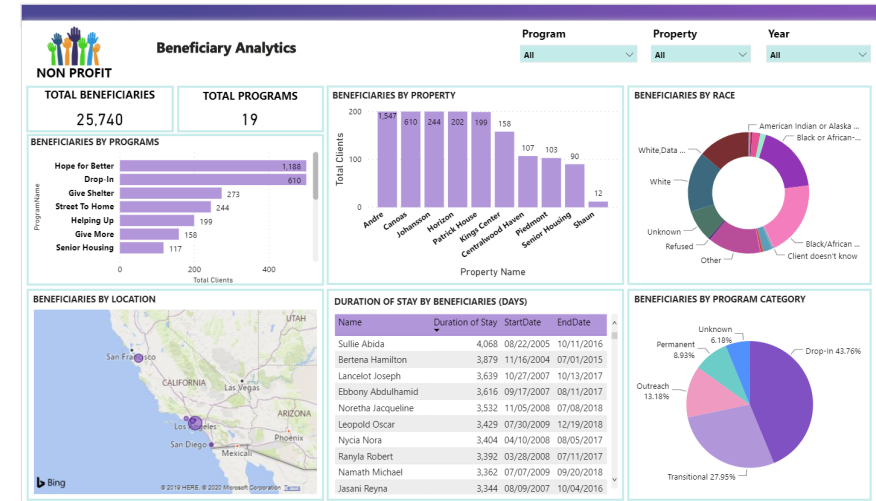
1. Alignment with organizational goals.
2. Improved efficiency and productivity.
3. Better risk management and security.
4. Enhanced scalability and flexibility.
5. Cost-effectiveness and better ROI.



Business Intelligence

Benefits of Business Intelligence:

1. Informed decision-making
2. Improved operational efficiency.
3. Employee empowerment.
4. Enhanced customer understanding.
5. Monitoring and agility.



Steps:

1. Define objectives.
2. Select the right BI tool/technology consistent with your systems vision.
3. Data integration and preparation.
4. Develop and deploy.
5. Continuous monitoring and improvement.
6. TRAINING!!



Boyer & Ritter Technology Solutions

People. Processes. Systems.

Consulting

Process and system assessments
Documentation and process mapping
Assistance with policy creation
Data Analysis

Technology

Financial Systems (ERP)
Customer Resource Management (CRM)
Systems integration
Workflow automation
Reporting & analytics