STRATEGY

BEYOND SCALE:
How to make your digital development program sustainable

Module 1 of 7
STRATEGY

MODULE SUMMARY

If you've been running a digital program for several years and it has shown potential for large-scale impact, you may be reaching a turning point where you need to step back, look at the big picture and determine your strategy for the next phase of the journey. Scaling your program to new users through replication or diversification of the products and services that it offers can necessitate major strategic shifts. A transition of the program’s ownership, the end of its initial funding, or changes in the regulatory environment, market demand or the competitive landscape can also require fresh approaches. A renewed strategy is essential for aligning internal and external stakeholders with your digital program’s new vision and for mapping changes in areas such as financial and business management, solution design and human capacity.

Before exploring the steps in the next six modules, some foundational questions need to be holistically considered. What are the internal or external changes that will shape your digital program in its next phase and what do these changes mean for your ability to expand? How will the structure of your program and the roles and responsibilities of key stakeholders need to change to reach your strategic goals? What impact will these changes have on your program, organization and partners? What are the constraints and risks you may face as you move ahead, and what are the strategies for mitigating them? Good strategic plans are flexible, living documents that teams work to continually update to reflect changes in the environment.
The focus of this module is on reviewing and refreshing the vision, goals and strategic plans of your entire digital program to address ecosystem change. It draws on interviews conducted with digital development leaders in organizations such as BBC Media Action, Esoko, the Bangladesh Directorate General of Health Services, Digital Green, mHealth Kenya, TaroWorks and Akros about their experiences creating a new strategy for growth or transition. Program directors and leaders who are driving the strategic planning process and overseeing all aspects of a digital program’s operations will find this module most useful. It may also be helpful for leaders of different functional areas, such as technology or finance, who will be driving strategic planning in those areas.

This module lays out a series of steps that you can take to develop a strategy for the next three to five years of your digital program’s growth and development. It provides organizing frameworks and tools that directors and leaders may find useful when revising their existing strategies and planning for the next phase.

After reading this module, you will have more tools to:

1. Assess the health of your digital program
2. Answer strategic questions about your digital program
3. Identify risks and prepare for change
4. Revise the strategic plans for each aspect for your digital program
Key steps

1. **ASSESS THE HEALTH OF YOUR DIGITAL PROGRAM**
   - Articulate the forces driving change in your program
   - Assess the current state of your program operations and external environment
   - Discuss strategic opportunities with stakeholders

2. **ANSWER STRATEGIC QUESTIONS ABOUT YOUR DIGITAL PROGRAM**
   - Replicate or diversify: define your expansion pathway
   - Public or private sector: assess whether your business model might impact your legal status
   - Redefine your program’s vision, goals and indicators

3. **IDENTIFY RISKS AND PREPARE FOR CHANGE**
   - Define internal and external expansion risks
   - Prepare for the impact of change on your organization
   - Identify and empower change champions

4. **REVISE THE STRATEGIC PLANS FOR EACH ASPECT OF YOUR DIGITAL PROGRAM**
   - Identify which aspects of your program will be impacted
   - Develop strategic plans for each area of work
   - Roll up functional plans into a program strategy
Articulate the forces driving change in your program

While nearly all successful organizations engage in regular strategic planning, a major change such as the end of donor funding or the transition of a program’s ownership requires a thorough strategic revision. Running out of funding, changes in the technical landscape and regulatory environment, and key personnel changes are some of the most common forces that impact digital programs at the four-to-five year mark. If your program is donor funded, you may have additional metrics that need to be met to obtain additional funding.

At this stage, it is important to update your financial projections and articulate new external and internal forces driving change for your digital program. Work with your leadership team to perform a root-cause analysis of these changes, and engage staff to share their thoughts on how they might affect your organization’s aspirations for growing its digital program. This will put you in a better position to understand team concerns regarding those changes, develop a program-wide strategy to tackle them, or have informed conversations with donors to influence success metrics moving forward.

Assess the current state of your program operations and external environment

With the forces of change in mind, make time to update the strengths, weaknesses, opportunities and threats (SWOT) analysis for your digital program. Start by assessing the current state of your program and strategy with your staff. Map these against the changing external environment to determine how your program needs to change to ensure growth or sustainability. A comprehensive assessment should look both inward and outward. As part of this process, develop a set of specific questions around the strategic opportunities that you’ve identified to discuss with key stakeholders.
In practice | Esoko

The direction we were growing in wasn’t going to lead to scale. We were getting large numbers of users but our financial performance was flat. We wanted farmers to eventually start paying for our market pricing information service themselves, after they had used it for free under NGO- and government-funded programs. However, this did not happen and we earned less revenue in 2015 than in 2014. We moved to Kenya to achieve greater scale because we realized that we were not going to grow the way we wanted to in Ghana alone. When we entered Kenya, we thought we could cut and paste what we had done in Ghana, but it didn’t work. We made many mistakes because Kenya is a more competitive market. But it wasn’t this move to Kenya that gave us the “Aha!” moment. It was when we ran the numbers and realized that we were actually losing money. It took going to the board, showing them the numbers, and convincing them that we needed to change direction to financial services — i.e. to something for which farmers were willing to pay, as opposed to information services, for which there was no desire to pay.

Other examples

- When Digital Green decided to reassess its digital platform strategy, it held internal leadership and external partner discussions. A key topic was whether to base its staff in partner offices. There was concern that this approach was making partners dependent on Digital Green for executing all aspects of video creation. As a result, Digital Green decided to provide remote support during its next phase of growth. This led to a positive shift, where partners took greater ownership of video creation, and were more invested in the process.

- The Bangladesh Directorate General of Health Services aligned its digital ambition with the governing party’s political agenda to secure funding for a health management information system (HMIS). The newly elected national government was eager to implement its Digital Bangladesh mission. This meant that there was tremendous political support for an HMIS, and funding was easily secured. Alignment with national strategy was thus key to the success of the initiative.

How to

- Learn about assessing your organization’s financial health and performance here and about the differences between strategic and business planning here
- Read about effective SWOT analysis here
- Learn more about evaluating your organization’s current strategy here
- See questions to consider when gathering stakeholder inputs here
Internal areas to review include your digital program’s people, processes and financial health. Consider these factors as they stand alone and as they interconnect: your organizational leadership and culture, business process strengths and areas needing improvement, budget expenditures versus income, the performance of different revenue streams, cash flow and reserves, financial forecasts, and the overall health of the sector.

For example, changes in leadership can create new opportunities, but have a profound impact on a company’s culture and how it sees itself. A lack of income and high operating costs may indicate areas where change is needed. Strong financial performance, including sustained interest from existing donors or interest from new investors, may allow for greater expansion.

Your assessment will also look outward to changes in the solution environment, which could include new technologies, increased connectivity, and competitive initiatives; the stakeholder environment, which includes funders, governments, partners and end users; and in the regulatory environment, which includes the implications of regulatory changes beyond your control.

For example, if you want the government to pay for your digital solution or services, changes in the country’s elected leadership could either support or damage your digital program, depending on your history with the elected officials and your alignment with their priorities. Similarly, new technology innovations may enable you to offer new products and services, deliver through new channels, or improve internal efficiencies and reduce operating costs. Alternatively, these innovations could take users away from your digital offering or contribute to its obsolescence.

FOR MORE INFORMATION SEE:

- Assessing your digital program: internal and external factors

Discuss strategic opportunities with stakeholders

Your board of directors, partners and advisers have a history and vested interest in your digital program’s future direction and success. Discuss your strategic questions with them, and ask for their input in developing your strategy for the next phase. You can engage these individuals via board meetings, dedicated strategic planning sessions or one-on-one interviews. Keep in mind that you need direct, candid advice for these discussions to be productive. In addition to the stakeholders mentioned above, consider interviewing three to five individuals who know your program, its context and its landscape well, and can provide candid advice because they lack a vested interest in its future.

As you embark on this process, share your program’s successes and challenges with stakeholders. Discuss the big internal and external trends impacting your program. Brainstorm or validate some of the strategic options you are considering for growth. Ask stakeholders to challenge your assumptions. Discuss the risks and how these trends may impact the shared
vision you have with your partners. Ask them to identify three to five things they would change about the program. These stakeholders have a wealth of experience and an outsider’s perspective, and they can be particularly useful in raising ideas for new directions, structures, partnerships and solutions for your program to consider.

Your assessment and stakeholder conversations will be most productive if they are guided by several fundamental strategic questions, explored in the subsequent steps in this module:

- Are the conditions right for an expansion of your digital program?
- Who is going to pay for any expansion?
- How will changes to your business model affect your program structure?
- What impact will these choices have on your organization, and how will you manage these changes?
Assessing your digital program: internal and external factors

The graphic below shows **internal** factors to consider when assessing the current state of your digital program. These include the strengths and weaknesses of your most important asset, your people, as well as your project management and roll out processes. They touch on how organizational culture might influence important strategic or philosophical decisions, such as whether to become financially self-sufficient or remain dependent on philanthropy; to plan for scale or deeper impact per user; to aim for competition or collaboration, and to build with open source or proprietary software. Other internal factors include your financial inflows and expenditures, including your business model and how it might evolve over time.

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**Internal factors**

- **People**
  - Leadership skills and mix
  - Management and technical resources
  - Organizational culture

- **Processes**
  - Strengths in current processes
  - Areas of improvement
  - Major process gaps and inefficiencies

- **Finances**
  - Business model including income and expenditure
  - Funding and economic environment
  - Future funding or investment opportunities

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**FOR MORE INFORMATION SEE:**

- **People**
  - Human Capacity: STEP 1. REASSESS YOUR HUMAN RESOURCE STRATEGY
- **Processes**
  - Roll Out: STEP 1. BUILD PROJECT MANAGEMENT FOUNDATIONS FOR SCALE
- **Finances**
  - Business Model: STEP 1. UNDERSTAND WHAT THE CHANGING LANDSCAPE MEANS FOR YOUR DIGITAL SOLUTION
The graphic below shows external factors to consider when assessing the current state of your digital program, including the competitiveness or relevance of your solution to your users and other external stakeholders, such as donors or government. For instance, in the fast-evolving digital services space, it’s common for partners to turn into competitors. As part of your assessment, consider the evolving needs of partners, influencers and end users. Assessing these factors isn’t just about collecting hard data. It also means asking tough questions about what’s working — and what isn’t — and looking ahead at trends that may be beyond your control in the external environment.
ANSWER STRATEGIC QUESTIONS ABOUT YOUR DIGITAL PROGRAM

Replicate or diversify: define your expansion pathway

At this juncture, based on the assessment you conducted in Step 1, a fundamental question needs to be answered: do you plan to expand your digital program in the next phase? If the answer is yes, replication and diversification are the two major pathways to consider. Replication entails the roll out of your existing digital program in new vertical markets and geographies, while diversification involves developing new products and services in addition to your current ones.

Each pathway has implications for your program’s strategy in the next phase. For example, replication in a new geography may involve relatively few changes to your digital solution (in terms of user experience) but big shifts in your business model, partnerships, technical solution design, and legal and human capacity requirements. Diversification in your current market, by contrast, might involve complementing your existing service with new services. This could entail fairly small changes to your sales and marketing channels but major changes in areas like solution design, business model and human capacity requirements. Many organizations will try multiple approaches, either in parallel or sequentially, to meet their strategic goals. See the graphic in the following section for more information.

Public or private sector: assess whether your business model might impact your legal status

Regardless of which expansion pathway you choose, you’ll need to assess whether your business model can generate enough income to cover your operating costs, a process explored in depth in the Business Model module of this guide. Doing so involves answering another fundamental question: Who is going to pay for your program’s expansion? While there are many potential sources of income for digital development programs, most fall into two broad categories: private sector or public sector. Be aware that donor funding is important for many programs in their initial phase, but it is rarely sufficient for digital programs aiming for long-term sustainability. Each of these routes has implications for your digital program’s legal status and structure.
In practice | BBC Media Action

What we’ve learned from travelling outside our comfort zone

As a British charity, our digital programs in countries such as Bangladesh and India have frequently taken us outside our comfort zone. Launching educational mobile services at scale has relied on complex partnerships with the public and private sector, including six MNOs.

Negotiating partnerships with MNOs has been challenging. We have had to learn an entirely new language, becoming fluent in the ABCs of the commercial mobile industry. We have learned to accept that MNOs see the beneficiaries of our digital programs as ‘customers’, and that they will not partner with us unless we present compelling commercial business cases.

In hindsight, reaching scale was much less challenging than achieving financial sustainability. We have tried both private and public-sector routes.

We tried to make our services sustainable by charging the end users of our digital services (though at reduced rates), and sharing revenue with our MNO partners and aggregator, as is standard commercial practice. Our objective was to cover MNO network costs, and service operating costs, thus making the services sustainable beyond donor funding.

The revenue that the MNOs earned from the ‘sale’ of our digital content and services to their subscribers was small, and was directly invested back into our digital program to fulfill our development objectives. But unfortunately, it did not cover the costs of managing, supporting, maintaining and marketing our digital services.

We then followed an alternative, public sector pathway to sustainability – i.e. making our digital services toll free to users to enable universal access to mobile phone users, and transitioning responsibility for costs to government. The road has been long and bumpy, but we’ve managed to achieve a significant degree of sustainability, including transitioning most on-going costs to government for three mobile health education services. This has involved significant organizational change, including hiring people with experience of working with government.

As a result, our internal equilibrium has shifted, from an organization focused primarily on strategic, creative social and behavior change communication, to one experienced in navigating government systems and supporting government processes. These two skill sets are complementary, but culturally very different, and sometimes this change has been challenging to manage. We’ve lost people, who felt ground down by the relentless tenacity that public sector engagement can require, but we’ve also retained and gained people thanks to our shared, personal commitment to the longevity and continued impact our work.
Generating private sector income typically involves charging either end users or commercial partners for the services your program provides. For NGOs who wish to pursue private sector income, it may be necessary to legally change the status and structure of their digital program. This can mean setting up a trading company, spinning off the digital program into a for-profit social enterprise or entering into a legal partnership with a commercial partner. Any of these steps will require significant time and extensive consultation with legal advisers.

Pursuing a public sector route, by contrast, involves government funding of your digital program and often means transitioning ownership to a government ministry or agency. This process involves significant knowledge transfer to government counterparts who will take over management of the program. It also requires government buy-in at a senior level and the ability of the ministry or agency to manage the program without your support after the transition is complete.

FOR MORE INFORMATION SEE:

- Replication vs. Diversification
- Business Model: STEP 3. IDENTIFY WHO IS GOING TO PAY FOR THE NEXT PHASE

Redefine your program’s vision, goals and indicators

Many organizations revisit their vision and mission statements during a strategic transition to reflect on how the expansion or transition of their digital program might impact their identity. This is an essential step at any major turning point and should involve not only your organization’s management but your board of directors.

To fulfill your digital program’s vision, you’ll also need to define what success looks like in the next phase, which is typically guided by the outcomes the program is trying to achieve. For example, instead of just providing farmers with agricultural information to improve their livelihoods, your new goal may be to deepen your impact by empowering them with cost-effective financial services as well. Your target might be to trial mobile sales of a new insurance product in one geography in the next six months. And your key performance indicators might include the number of farmers contacted, the number of farmers who acquired the service or the amount of revenue generated each month.

If you’re transitioning your program to government, your goals may shift from achieving outcomes directly through your digital program to effectively empowering government to achieve these goals. And you may have entirely different targets, such as transitioning a certain number of contracts to the government by a specific date. The SMART approach (using goals that are specific, measurable, achievable, results-focused and timebound) can help clarify goals with staff. Agree how you will track progress toward your goals and set realistic targets and indicators based on your roll out plans.
Other examples

The Grameen Foundation wanted to make the **TaroWorks** platform sustainable by establishing a corporate structure that would allow it to charge users for its software. Reaching that goal meant transitioning TaroWorks from a project operated by the Grameen Foundation to a separate legal entity. While Grameen still owns TaroWorks, its ownership stake will decrease over time as new investors are brought in. This transition fits with Grameen’s larger strategy of funding early-stage innovation rather than becoming a provider of venture capital or a long-term owner of technical platforms.

**Digital Green** has defined a series of **metrics** to monitor the impact of its digital interventions on farmer productivity. Monitoring data indicates that its video interventions raise farmers’ productivity by 21 percent. In its next five year strategy, Digital Green has increased its target to increase productivity by 40 to 50 percent.

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**How to**

- Review criteria for well-developed **vision** and **mission statements** [here](#).
- See techniques for evaluating different strategic scenarios [here](#).
- Learn more about setting targets and evaluating your program [here](#).
Replication vs. Diversification

Expansion pathway implications

**Expansion pathways**

- **Geographic replication:** expand the program to new geographies (within the current country or to another country).
- **Vertical expansion:** adapt the digital solution for another vertical (for example, from health to agriculture or financial services).
- **End user expansion:** extend the program to new users from the same audience segment or to new audience segments.
- **Service or product addition:** add new products or services to reach new user segments, or enhance existing relationships.

**Key implications may include**

- **Replication:** Modification of business model and partner relationships, Compliance with new legal and regulatory environments, Addition of local human capacity, Adaptation of solution design to increase efficiency and cost effectiveness or localize content.
- **Vertical expansion:** Modification of business model and partner requirements, Changes to solution content and potentially, functionality, Development of partner relationships and human capacity in expansion vertical, Compliance with vertical legal and regulatory requirements.
- **End user expansion:** Modification of business model and roll out strategy, including training, monitoring and supervision or marketing, distribution and sales, Adapt solution design for new user personas, journeys and content.
- **Service or product addition:** Adaptation of solution design for new products and services, Modification of business model and execution of new user research, Development of partner relationships and human capacity to develop and deliver new products or services, Compliance with legal and regulatory requirements that may apply to new products or services.

**Expansion pathway implications**

**Replication:** Scaling your solution in the same or different geographies often involves adapting your business model to different regulatory environments, establishing new partnerships, modifying or signing new contracts, changing your technical solution design, localizing your digital solution (particularly content), documenting and systematizing your program’s processes, increasing your support capacity, and building your team to deliver your expanded digital program. This guide highlights the experience of BBC Media Action, which has adapted most aspects of its digital program as it scaled its mHealth education services across India.

**Diversification:** Offering new digital products and services can be a better way of meeting the needs of your end users, increasing your reach and impact, and creating additional revenue streams. This guide highlights the experience of Esoko, which diversified its business model and portfolio by introducing financial services for farmers in addition to its original service of providing agricultural information.
### Business model implications

The business model you develop to fund your expansion is likely to have a major impact on your digital program’s legal status. A private sector business model — where NGOs collect commercial revenue on a large scale — may require setting up a new legal entity, while a public sector model may mean transitioning ownership of the program to a government partner. This guide features the experiences of BBC Media Action, Akros, Dimagi, SolarNow, Digital Green and TaroWorks in transitioning the ownership of their programs either to government or commercial entities.

#### Legal and financial responsibility

<table>
<thead>
<tr>
<th>PRIVATE-SECTOR BUSINESS MODEL</th>
<th>Key implications may include</th>
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<tr>
<td><strong>Open a trading company:</strong> create a legal entity owned by your organization that is allowed to process commercial revenue generated by your digital solution.</td>
<td>Extensive legal consultation to create trading company, compliance with taxation regulations and reporting requirements in relevant geographies and new human capacity to manage the trading company.</td>
</tr>
<tr>
<td><strong>Spin off your digital program:</strong> create a forprofit social enterprise to run your digital program, in which your NGO may or may not have a stake.</td>
<td>Extensive legal consultation to create spin off for profit company, significant shifts in human capacity, changes in organizational culture and an entirely new business model.</td>
</tr>
<tr>
<td><strong>Create a commercial partnership:</strong> partner with a private-sector company that can pay operating costs in return for branding benefits and access to end users.</td>
<td>Lengthy legal and commercial negotiations, potentially transitioning responsibility for tech partnerships and financial management, including tracking and reporting.</td>
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<tr>
<th>PUBLIC-SECTOR BUSINESS MODEL</th>
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<tbody>
<tr>
<td><strong>Transition to government ownership:</strong> transition responsibility for costs and management of digital solutions to government.</td>
<td>Significant investment in building government partner relationships and human capacity, knowledge transfer and legal transfer of ownership of assets, including hardware and software licenses.</td>
</tr>
</tbody>
</table>
IDENTIFY RISKS AND PREPARE FOR CHANGE

Define internal and external expansion risks

Change always entails risk. It’s important to think about the internal and external risks — or threats — of expanding or transitioning your digital program. This includes both risks that are under your organization’s control as well as those that are inherent in the external environment. Internal risks can include management and technical capacity gaps, persistent financial operating deficits and staff resistance to change.

For example, a technical capacity risk may be that one of your technical vendors or key staff decides to leave because of the transition and you are not able to replace them fast enough. A financial risk may be that expenses related to new geographical expansion — such as software licensing, registering as a new legal entity, network connectivity, hardware costs and training — increase operating costs unsustainably.

It’s important to think about the internal and external risks — or threats — of expanding or transitioning your digital program.

External risks can include changing regulatory environments, new competition for your solution or decreased availability of funding. For instance, regulatory changes related to how user consent is obtained could have implications for the design of your solution’s user interface. It could also lengthen enrollment processes, reporting and overall timelines. Completing a risk assessment for the expansion or transition of your digital program can help you identify or prioritize the risks your organization faces based on their probability and impact.
In practice | mHealth Kenya

Watch Dr. Cathy Mwangi, CEO of mHealth Kenya, talk about the challenges she and her staff faced when changing from a donor-funded model to a commercial model, where clients and end users paid for services.

Other examples

When Akros successfully proved its concept in one district in Zambia and began rolling out in nine more districts, it faced a lot of risks, unanswered questions and untested theories. This required senior management to be heavily involved in the roll out process. Over time, project management protocols were validated or revised. Akros documented these findings and revised its protocols until the organization had a robust implementation system in place. When new people joined the organization, Akros made sure they were briefed and monitored on these protocols and knew the objectives of the project. These documented protocols and processes substantially reduced risk as the organization grew.

How to

- See a risk assessment matrix template [here](#)
- Read more about risk assessment [here](#)
- Read more about readying your organization for change [here](#)
- See tools for building organizational effectiveness and change management [here](#) and [here](#)
Prepare for the impact of change on your team

Expanding or transitioning a digital program can impact your staff, organizational culture and the processes, systems and tools that everyone uses to do their jobs. People within your organization need to understand the changes, requiring careful communication at multiple levels. It also requires you to develop a formal case to justify the new direction, and establish clear processes for and ownership of the change.

Change management requires creating formal governance and leadership structures for the program moving forward, engaging and managing stakeholders throughout the change process, communicating the change effectively, providing training and support to internal teams, external partners and end users, and monitoring and reinforcing new routines carefully. Remember that effective change management includes an ongoing and long-lasting process of continuously communicating and reinforcing change, and that it affects everyone on your staff as well as the people you serve.

Identify and empower change champions

Making changes to organizational structure, defining new roles for people and teams, and planning the timing and speed at which things change will all impact people’s jobs and attitudes. To make this process smoother for yourself and your staff, define the roles and involvement that leadership and team members will have in the change process.

For example, executive stakeholders can provide the organizational direction, a steering committee can provide project direction, individuals or teams driving change can provide project leadership, and other managers can ensure project execution. Identifying and empowering internal change champions — at all levels of your organization — who endorse the transition and smooth resistance can be invaluable. Identify these champions early on, talk to them about why you would like them to show leadership, and allow them to define their role in ushering in the change.
Making changes to organizational structure, defining new roles for people and teams, and planning the timing and speed at which things change will all impact people’s jobs and attitudes.
STEP 4

REVISE THE STRATEGIC PLANS FOR EACH ASPECT OF YOUR DIGITAL PROGRAM

Identify which aspects of your program will be impacted

Replicating or diversifying your digital program will impact its core functions. The pathway you choose will determine the degree of change required. The modules in this guide can support you in developing strategic plans for each core function (finance, legal, HR, solution design, roll out etc.) with your teams. Engaging your teams early on can help build their ownership, which will help prevent feelings of surprise or uncertainty.

Develop strategic plans for each area of work

It is important that the teams within your organization align their own strategies with your organization’s new goals. Their strategic plans should set clear strategies, tactics and metrics, all of which should support the digital program goals set in the previous step.

For instance, you may have set a target of increasing your mobile finance program’s user base by 20 percent. A strategy for your sales team to support that goal might be to establish new distribution partnerships with insurance companies. The tactics your sales team sets would then encompass all the activities to bring these new partners on board, measured by indicators such as the number of new insurance partners and agent outlets added each year.

Roll up functional plans into a program strategy

Once the strategies, tactics and measures for each aspect of your digital program are set, roll these up into your overall program strategy and discuss them with your teams. A document that organizes each team’s strategies, tactics and measures against each of your goals can provide a clear view of how everyone is pulling in the same direction. Further breaking down these tactics into deliverables with quarterly targets can be a big step toward operationalizing your plans and making them actionable and transparent across the organization.
How to
Learn more about the role that goals, strategies, tactics and metrics play in informing a strategy here

Engaging your teams early on can help build their ownership, which will prevent feelings of surprise or uncertainty.
RESOURCE ROLLUP

Who do you need?

Developing a strategy to grow or transition your program is a highly collaborative effort. Your program’s top management will be integral to leading key processes such as updating the vision and mission of your digital program.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Resource type</th>
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<tbody>
<tr>
<td>Current state assessment</td>
<td>Program leadership, partners, advisers, analysts</td>
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<tr>
<td>Vision, mission and goals</td>
<td>Program leadership, all functional teams</td>
</tr>
<tr>
<td>Functional strategies and roll out</td>
<td>Functional leaders, program leadership</td>
</tr>
<tr>
<td>Risk assessment and change management</td>
<td>Program leadership, analysts</td>
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</table>

Pro tips

Involve all stakeholders. Updating your program strategy will impact your entire program team, your organization and your partners. It’s important to have participation from all stakeholders to gather inputs and get their buy-in to the plans as they are being created.

Set clear and realistic goals. Rationalized plans, with clear goals and measures, are needed to get strategy buy-in and ensure alignment across your organization. Remember that vision drives mission, which drives your program goals, which drives function-specific (team or departmental) strategies. And all of it supports your program strategy.

Focus on change management. A strategy is only as good as its execution. An approach to change management that focuses on managing the impact of change on both people and processes is a critical first step in execution and connects your strategy and roll out plans.
# Referenced resources

## 1. ASSESS WHERE YOU ARE TODAY

- **Guide:** How to Research a Nonprofit’s Financial Strength
- **Guide:** Business Planning for Nonprofits
- **Article:** SWOT Analysis - Do it Properly!
- **Article:** How to Evaluate Corporate Strategy
- **Example:** A Deeper Dive into Methods for Stakeholder Listen: Sample Questions for Stakeholders

## 2. ANSWER STRATEGIC QUESTIONS ABOUT YOUR DIGITAL PROGRAM

- **Article:** Mission and Vision Statements
- **Toolkit:** Exploring Assumptions & Context: Forecasting
- **Toolkit:** The Strategic Planning in Nonprofits (SPiN) Cycle

## 3. IDENTIFY RISKS AND PREPARE FOR CHANGE

- **Toolkit:** Smartsheet: All the Risk Assessment Matrix Templates You Need
- **Paper:** Risk Assessment in Practice
- **Article:** Four Actions Nonprofit Leaders Can Take to Transform Organizational Culture
- **Article:** Key Elements of Effective Organizations: Bridgespan’s Organization Wheel
- **Article:** 10 Principles of Leading Change Management

## 4. REVISE STRATEGIC PLANS FOR EACH ASPECT OF YOUR DIGITAL PROGRAM

- **Tool:** The OGT Method of Goal Setting: Linking Strategy and Performance
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tbody>
<tr>
<td><strong>Aggregator</strong></td>
<td>An organization that acts as a middleman between application and content providers, and mobile carriers. Provides message traffic throughput to multiple wireless operators or other aggregators; provides mobile initiative campaign oversight, and administration, as well as billing services.</td>
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<tr>
<td><strong>Key performance indicators</strong></td>
<td>Measurable values used by managers to assess the effectiveness of processes and functions in meeting organizational goals.</td>
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<tr>
<td><strong>Measures or metrics</strong></td>
<td>Numbers or quantities that record a directly observable value or performance.</td>
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<tr>
<td><strong>Mission statement</strong></td>
<td>A short statement of an organization’s purpose identifying the scope of its operations: what kind of product or service it provides, its primary customers or market and its geographical region of operation. It may include a short statement of such fundamental matters as the organization’s values or philosophies and main competitive advantages.</td>
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<tr>
<td><strong>Tactics</strong></td>
<td>Microstrategies that take advantage of business situations as they develop. They are quick, actionable plans that support an organization’s overall strategy.</td>
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<tr>
<td><strong>Trading company</strong></td>
<td>Businesses working with different kinds of products which are sold for consumer, business or government purposes. Trading companies buy a specialized range of products, maintain a stock or a shop, and deliver products to customers.</td>
</tr>
<tr>
<td><strong>Vision</strong></td>
<td>An organization’s road map, both indicating what the organization wants to become and guiding transformation by setting a defined direction for the organization’s growth.</td>
</tr>
</tbody>
</table>