



# Digital Maturity self-assessment

Level 3

# What's in this document

This document provides a short description of your organisation's present level of digital maturity and steps your organisation can prioritise in order to start using Digital to its full potential (in helping achieve your organisation's vision and mission).

While all organisations are different and descriptions and levels will not exactly correspond to your situation, the results will give you an indication of the areas that can be improved, a suggestion of where to start this process and where to invest your resources.

There are three sections:

- **Introduction** – description of 12 competencies assessed to measure digital maturity
- **Your digital maturity level & recommendations for moving up a level** – suggested next steps your organisation can take to progress to the next level of digital maturity
- **Descriptions of other levels**

The level of digital maturity and advice are based on the experience of Digital Leadership Ltd gained over the years of leading Digital at leading UK charities and working with charity clients as a consultant.

I hope you find this useful and if you have any further questions or would like to discuss support for moving up, please get in touch.

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P.S. Big thanks to Tim Kitchin @ Copper Digital for his help and support in developing this model.

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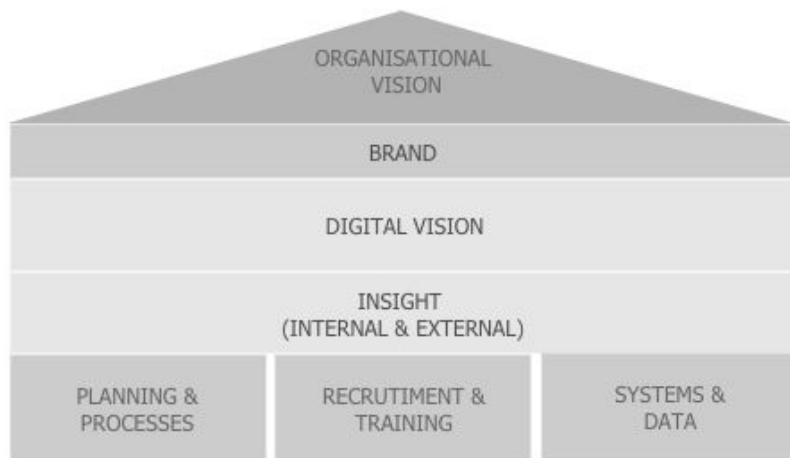
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# Introduction

When thinking about digital transformation we looked at eleven organisational competencies that are essential for embedding Digital in an organisational strategy and operations.

These competencies fit under the building blocks of a digital strategy framework (summarised in the digital strategy house on the right):

- Digital Vision & Leadership
- Insight
- Processes (Planning, Innovation and Reporting)
- Staffing (Digital Capability, Recruitment and Training)
- Systems (Technology platforms, Budget and Data Management)



Underlying the competencies is organisational culture and attitude to Digital and to organisational change.

**How each of the competencies impact on the success of a digital transformation programme is described below.**

## Culture & Attitude

With the development and mainstreaming of Digital across organisations and the increased investment in this area, many Digital Leads (the person in your organisation who is responsible for digital delivery or digital strategy), find themselves spearheading a wider and necessary organisational change process, triggered by these changes.

However, Senior Management often do not realise the extent of these changes and the support that might be required by Digital Leads to guide the organisation through them.

The change triggered by digital transformation is indeed transformative - it changes how things used to be done, it requires new behaviours, new skills, new systems and new technology. That is why an organisation can only embark on the process of digital transformation with strong vision on how Digital can most significantly help it reach its objectives, strong support from the top levels of the organisation and an investment in Digital Leads, digital technology and digital training.

## Planning

In order to get best value out of Digital, organisations need to integrate planning under the same brand (in order to keep consistency across different channels) and become audience centric in how they make planning decisions (in order to successfully engage audiences where they are). ☐

When this isn't the case, disparate communications have varying levels of impact, some are successful, some bomb. ☐☐ Overall, this means that the effort put into communications/marketing initiatives are sometimes not strategic. Organisations are not learning from previous experience, understanding what works best for their audience and are not optimising future communications accordingly.

☐ When organisations plan in an integrated and supporter-centric way, communications reach and impact grows over time thanks to gradual improvements based on evidence.

## Reporting

Many charities say that their work is evidence-based but not all apply this criteria when it comes to their communications/marketing planning. ☐☐ Sometimes challenges are related to a lack of ability to generate performance reports due to data being held in disparate databases that don't 'talk' to each other.

Sometimes this is due to culture – where lessons from previous communications projects are simply not considered when planning new ones.

When planning is based on lessons from previous experiences, organisations can learn and improve every time they push communications out to their audience. Results can also provide an unbiased view of what audiences are responding to/are interested in, which helps future communications planning.

## Insight

Using audience insight in making decisions is based on a belief that this is the only way to successfully engage supporters and deliver for beneficiaries. Once an organisation is focused on its priority audiences, it starts to integrate communications planning better.

This also means the organisation will invest in creating and collecting independent evidence of market trends to develop communications and products. <sup>2</sup>

For example, once organisational objectives of a communications/fundraising/marketing campaign are clear, an organisation would look to understand where the target audiences are when it comes to that issue. What will be needed to engage target audiences and get them to act in the desired way can then be identified.

## Innovation

Innovation is driven by competitive appetite, by perfectionism and by a healthy level of dissidence. A willingness to speak out against the status quo.

Ultimately what enables innovation is a sense of ambition on behalf of beneficiaries and donors.

As such, innovation requires a willingness to take a leap of faith, invest, learn and keep improving on what's being done (be it ways of working or a product), and to not necessarily drop products if they don't work as planned the first time round. Prototype, launch, learn, amend and try again.

# Technology platforms

In order to form a single view of a supporter, deliver personalised communications and services, new technology is needed, developed with digital communications in mind. These technologies are about improving the performance, speed, user experience (both of staff and beneficiaries) and about generating better reporting leading to better understanding of how well current systems are working. More often than not, to achieve this, pre-digital technology and business processes need to be updated or changed.

The ability to upgrade and integrate technology platforms requires a daunting mix of commercial pragmatism, long-term thinking, a willingness to invest and a commitment by all to use new technologies once they are acquired.

However systems change doesn't have to mean throwing everything old out and starting a new as this can be very disruptive for an organisation. Start by adding new technology systems, creating new business processes and providing support and training to users in utilising them. Then you can think about replacing some old systems.

## Budget

Budget for Digital is not always seen as a priority. There are often requests for it to be reduced although there is a clear increase in digital activity overall.

Sometimes digital budget is only spent on technical maintenance while the rest of it is included in other team budgets. This is limiting the ability of the digital experts to test and create new products. In some cases it also means that teams have already gone some way in planning a digital product without seeking advice from Digital Leads.

Without an oversight of the digital spend by a Digital Lead, digital products can often be output-led (such as “we need an app” or “we need a website”) rather than, preferably, objective-led (“we need to engage audience X to do Y”).

# Data management

Data management is your 'way in' to understand audience behaviour and to make both commercial and social impact decisions.

Understanding how audiences interact with an organisation, through which channels and how often (single supporter view) will help segmentation of communications. At first this can be done with email, later with social media and websites.

Data on how different digital products are performing is essential learning to feed into future planning. It shows what audiences are reacting to and where improvements can be made. Some common obstacles to getting the insight from data:

- Systems holding data are disparate and there is no easy way of bringing that data together to form a single supporter view
- Legacy technology and internal processes are primarily based around financial reporting and forecasting and are not fit for real-time digital marketing communications. ☒

# Digital capability

Digital skills need to attain two separate objectives – to become pervasive across the organisation and for the process to be strategically managed.

This requires a breadth of vision and depth of expertise among digital practitioners.

There also needs to be a clear direction from top levels in an organisation that digital skills are essential in every job, whether this is acquired through recruitment or through staff development and training.

Where Digital should 'sit' within an organisation (central team, de-centralised team, 'hub and spoke') depends on how that organisation operates.

But, it's essential to not de-centralise too soon.

In order for 'hub and spoke' structure to work, the organisation needs to have a good set of processes (for planning, recruitment, evaluation), systems (for data, content, marketing) and a clear digital strategy. Decentralising without this being in place will lead to lack of consistency and effectiveness in Digital output.

While, in the longer term, Digital is seen as a given in every job and everything an organisation does, it will inevitably need strategic leadership by experienced specialists (as is currently the case with Communications, IT or Fundraising). Until people with long-term digital strategy background come into leadership positions.

## Recruitment

Digital skillset needs to be part of every job description. And if the skillset can not be recruited, training and support should be provided.

Salary grades can be an obstacle for recruiting digital talent, especially for organisations with limited budgets. While the right candidate will be the one motivated by an organisation's mission rather than by the salary, it can not be expected that they will accept a position that's paid considerably lower than the rest of the market.

## Training

Training is an essential condition for an organisation to become truly digital. The investment in digital skills of all staff, managers and members of the Board is essential in order to enable longer-term transition to a digitally transformed organisation.

Often Digital Leads in organisations are either not skilled, given enough time, or positioned in the organisational hierarchy to help lead the kind of change all-round digital implementation triggers.

It is therefore essential to invest in the development of digital experts into Digital Leaders and ensure the successful implementation of Digital Vision by guiding the organisation through this process.☐



# Leadership

In order to be strategic about Digital one needs to draw on confidence gained through practice.

Digital leadership is demonstrated by a Digital Leader who understands the digital ecosystem, can identify how Digital will contribute to an organisation's strategy and builds trust and motivation amongst colleagues so together they make the digital vision a reality.

The role of a Digital Leader is a complex one as that individual needs to be able to work with, influence and integrate all functions in an organisation:

Brand

Communications & Marketing (content, creative and innovation)

Supporter management and development

Financial processing

IT

Supporter care

Data

Reporting

Programmes

Service delivery

Operations

Retail

... and any other function that an organisation might have.

The assumption that someone who doesn't 'get' digital technology and data-centric thinking should be a Digital Leader, by virtue of traditional authority, or seniority, or because they manage the legacy function of 'impact' of 'communications' – is a mistake.

The solution is a mix of upskilling Digital Leads in management capability, recruiting them into senior positions and familiarising traditional functional leaders and Boards with digital challenges.

All are necessary.

# Staff experience

How staff do their jobs as an organisation impacts on the effectiveness of the organisation and its operations.

Digital provides many solutions to improve collaboration, especially where staff is working in many different locations, knowledge-sharing and administration. Over the years, new systems have been introduced in organisations by different teams. The result: staff having to deal with many different systems, some of which are used often, some of which are used only occasionally which means that knowledge of how to use them fades quickly. All together, this doesn't make for a good staff experience and a more effective organisation.

Changing how you do things needs to go hand-in-hand with staff engagement, training and clear vision and direction from the top.

# Service delivery

Delivery of services in increasingly moving online in the developed countries and this is a trend that organisations need to embark on. Even in the developing countries, the penetration of smartphones and social media is increasing at a dizzying rate and organisations are moving towards using Digital to communicate/provide services to beneficiaries.

Often, the tendency is to look at technology and then try to find a problem that it could solve. For example, a few years ago this has led to the development of many apps which were a trend of that moment, many of which have failed to deliver any real benefit to the organisation.

It is important to start by identifying the biggest issues in service delivery first. Only then is it worth looking if they can be addressed by creating digital solutions which will make process easier and more efficient from the user point of view. Then follow the best practice cycle of innovation - prototype, launch, learn, amend and try again.

# Your result

## Level 3 – Digital as a channel

You have a Head of Digital type-of-role, digital team and digital roles in other teams who can together deliver projects with in-house resources or agency help. You possibly have a digital strategy but it's not yet permeating all levels in the organisation; some managers do not see how it fits with the wider organisational strategy.

Digital is represented by an SMT member at the decision-making levels of the organisation. Senior managers are supportive of Digital on the implementation and delivery level. There is no digital representation on the Board.

Digital team/Head of Digital are invited to input into planning and implementation of big projects and into cross-organisational planning when this is seen as useful by planning leads.

The Content Management System (CMS) is working but needs replacing soon. You might not have a mobile-responsive website but you have some mobile friendly journeys (e.g. for donation, or campaign action). Your supporter database contains some data on online activity (such as transactions, campaigning actions, event registrations) and is updated frequently but not in real time.

Digital performance data is reasonably detailed, frequently shared and used in planning a range of activities. However it is complicated and time-consuming to generate due to disparate data sources which aren't integrated.

Budget for Digital is focused on technology. Budget for digital creative is small so needs to be contributed alongside other teams.

Digital Lead is involved in the recruitment and the design of digital training which exists as a part of your organisation's learning and development priorities. There's a good range of skills and digital roles in the organisation.

### **Moving up**

To move up a level these are the steps you can take in order of priority:

1. Define a process which will help everyone in the organisation understand how your digital strategy fits into the wider ambition of the organisation. While this can seem like a luxury when time and resources are tight, it is essential to do as it will direct all future digital activity – from website development to recruitment.
  2. This could mean that you need to re-do the existing digital strategy to ensure that main stakeholders have the opportunity to engage from the beginning in the shaping of the final digital strategy/framework.
  3. Invest in the personal development of your Digital Lead's leadership skills so they can guide the organisation through this process and digital strategy implementation.
  4. Fix the basics. Those things that didn't get done because you had to deliver for a new priority initiative now have to get fixed. Otherwise they'll become a stumbling block. So, fixing that website or improving the performance of the web servers, or improving the donation journey – should become the priority.
  5. With main stakeholders take a serious look at what you need to be able to segment based on behavioural data. What are the steps you need to take to establish a single supporter view, or at least a full view of supporters' online engagement? Do you need new processes for reporting or new technology to link all the different data sources and create reports quickly?
  6. Mainstream the integrated communications planning process across the organisation. Start with one flagship project by including Digital as a stakeholder from the briefing stage and all the way to implementation. Then roll out that integrated planning process to every single project.
  7. Start a digital mentoring programme for the SMT and the Board.
  8. Co-opt or recruit a Digital expert to the Board.
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# Other levels

## Level 4 – Digital integration

Digital strategy is led by a Head of Digital or Director of Digital type-of-role. Delivery of different digital functions is led by a Digital Team, possibly working with satellite digital roles in other teams (e.g. digital storytelling could be in the content team). IT function in the organisation has likely taken on the responsibility for the maintenance of digital technology and security.

The main website is being or has recently been re-launched with an up-to-date CMS which is mobile-responsive, and can be data driven, allowing for personalisation. A CRM system is in place which uses data (almost) in real-time from a number of data sources from your key channels.

Digital training is a priority for all staff and it is either managed by the internal team or external suppliers. Senior managers and Board members are also encouraged to attend it.

Digital strategies for specific engagement channels are in existence, e.g. digital campaigning strategy, digital fundraising strategy, digital content strategy, social media strategy etc. Senior managers provide support to the Head of Digital, but they still represent those strategies themselves in senior management meetings and decision-making. There is a digital expert on the Board.

Data segmentation can be done relatively quickly (days rather than weeks) but a lot of the data processing is manual (rather than automated). Cross-channel journeys can be personalised.

Performance data is readily available with a quick turn-around based on well-connected data sources. Operational teams can interrogate and query the data in a timely way to improve planning and performance.

Audience engagement insights reflect a supporters' online behaviour and campaign responses and these are integrated into the communications planning and targeting.

Innovation is planned and focused on things that transform supporters' or beneficiaries' experience.

## Level 5 - Transformed and changing

People in your organisation feel that Digital is the principal way to engage current and future supporters and central to both operational and supporter/client engagement work.

Digital has a strategic voice, represented by a Digital Director who takes part in strategy-level decision-making. The organisation seeks advice from its Digital Director on coping with market change caused by developments in Digital. The CEO champions digital transformation. There is at least one digital expert on the Board.

Director of Digital leads a team whose expertise is distributed across the organisation and deeply embedded in other teams and job descriptions. Digital is a part of a wide range of functions– from strategic leadership and communications planning, brand experience, user experience, supporter services, programme/service delivery to technology development and maintenance and innovation.

Every project is grounded in rich supporter insight which guides the project design from the outset. This is delivered thanks to a 21st-century CRM which enables real-time reporting and triggered communications at the touch of a button such as real-time dashboard updates, and automated email programmes. Real-time (or close to real-time) dashboards are available to everyone in an organisation, responding to the needs of teams and driving clear improvements to operations.

A large scale digital training programme is running, managed by HR in collaboration with Director of Digital. Digital training or mentoring is essential for Senior Management and the Board.

It's likely that there is a programme which is ran independently from the day-to-day organisational hustle and bustle. The programme team can spend time on working with experts in the organisation and understanding the external market in order to create products that respond to the same challenge your organisation is trying to solve.

Your organisation has gone as far as possible with digital transformation within the existing organisational structure and hierarchy. The most likely next stage will be more fundamental change to the core of the organisation – how it's run and how decisions are made.

**If you have any questions about this report or would like a tailored feedback on how your organisation could be moving up the ladder of digital maturity, get in touch:**

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