

Workday for nonprofits—a buyer’s checklist.

Four best practices for nonprofit digital transformation.

A digital transformation to ERP is a big step forward for any organization. For nonprofits, it can be game-changing—increasing operational efficiency and organizational resilience, improving workplace culture, and most importantly, maximizing mission achievement. However, it can be challenging to even know how to begin your digital transformation with an approach that benefits the entire organization.



To help you move your mission forward, we’ve assembled a checklist of do’s and don’ts across four of today’s top digital transformation strategies.

Preparing for digital change.

Do:

- ☐ Envision the future, and align your technology with your organization’s long-term mission and vision.
- ☐ Focus on people, process, tech, and data:
 - ☐ Align across departments on business requirements.
 - ☐ Eliminate “lift and shift” or “this is the way we have always done it” thinking.
 - ☐ Assess your current governance and stewardship to align data models and improve data sharing across departments.
- ☐ Recognize that transformation is a journey, not an end state.

Don’t:

- ☐ Don’t forget to invest in change management and training to ensure technology adoption is efficient up front.
- ☐ Don’t assume “business as usual” will resume after stabilization and neglect to foster a “build to operate” mindset from the beginning.

Evaluation best practices.

Do:

- ☐ Define and keep your signature requirements central to the process.
- ☐ Involve executive decision-makers early and often.
- ☐ Align your selection to both your culture and your strategy.

Getting to go-live.

Do:

- ☐ Engage actively with your people (it's all about the people).
- ☐ Commit proactively to change management planning and execution.
- ☐ Adopt a mindset for sustainable change and continuous improvement.
- ☐ Communicate the transformation and the available support structures early and often.
- ☐ Update policies to apply to the new system.

Partnering for long-term goals.

Do:

- ☐ Revisit your original mission, goals, and objectives regularly.
- ☐ Foster a mindset to govern and evolve with purpose.
- ☐ “Lean on me”:
 - ☐ Know what resources are available.
 - ☐ Expect to lean on others.
 - ☐ Conduct honest self-reflection.
- ☐ Leverage advice from peers—that's the power of a single version for the entire Workday community.

Don't:

- ☐ Don't forget to leverage the resources and expertise available in the marketplace to streamline your process.
- ☐ Don't over analyze and fall victim to “analysis paralysis.”
- ☐ Don't lose sight of the end goal: a system that works for your organization's needs and strategic goals.

Don't:

- ☐ Don't perform change management on the fly without a plan, or stop doing change management after the go-live.
- ☐ Don't forget to proactively provide in-person and digital training resources to facilitate adoption and empower users to help one another.
- ☐ Don't neglect to ensure that the project team/service delivery is transferred to new ownership.

Don't:

- ☐ Don't deploy and then shelve, or fail to activate, all functionality.
- ☐ Don't revert to a siloed mindset and neglect to facilitate continued cross-functional teams across the organization.
- ☐ Don't stop performing change management—today's solutions are not static, and require continued innovation and user engagement to get the most value.

What can your nonprofit organization achieve with the right cloud-based enterprise management system? These are just a few of the benefits that organizations like yours have realized from a digital transformation with Workday:



To further explore digital transformation for your organization, watch [Coffee Talk Series: Nonprofit Best Practices for Digital Transformation to ERP](#) on-demand. Designed to guide mission-based organizations considering cloud ERP solutions through the process, this four-part series featuring experts from Workday, along with Collaborative Solutions and CrossVue, takes you through best practices to help you evaluate your needs and map out a future vision, choose a potential partner, and guide successful project management from kickoff to go-live.



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