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Planning for the future – *making digital real* at the National Youth Orchestra

CFG Conference, 29 June 2023





adapta



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Making Digital Real

- We are a **specialist** information systems consultancy
- We only work with **charities**, associations, trusts and others in the not-for-profit sector
- We are completely **supplier-independent**
- Our consultants have held **senior** positions in a broad range of different organisations
- Our advice and guidance is based on **practical experience** gained over many years

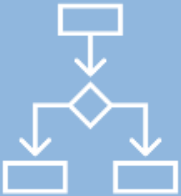
Depth and breadth



Digital, Data & Technology Strategies



Reviews & Health Checks



Business Processes & System Requirements



Supplier & Solution Selection



Interim Technical Leadership



Programme & Project Management



Risk, Compliance, Data Protection & Security



Governance & Business Cases



Change & Organisational Development

Our Mission and Purpose

Our Mission

We **empower** organisations to deliver transformational impact through more effective use of technology and ways of working

Our Purpose

From **our minds to your minds** – our team of experienced, independent consultants work with you to transfer their knowledge, share their expertise, and **develop your organisational capability**



Setting the scene – an heretical statement!

*“Nurturing an effective digital culture is difficult. Selecting and implementing **technology** that can actually support your digital strategy is at least as difficult!”*

**Digital – who are we
thinking about?**



**The customer (supporter,
fundraiser, campaigner,
beneficiary, volunteer,
participant)**

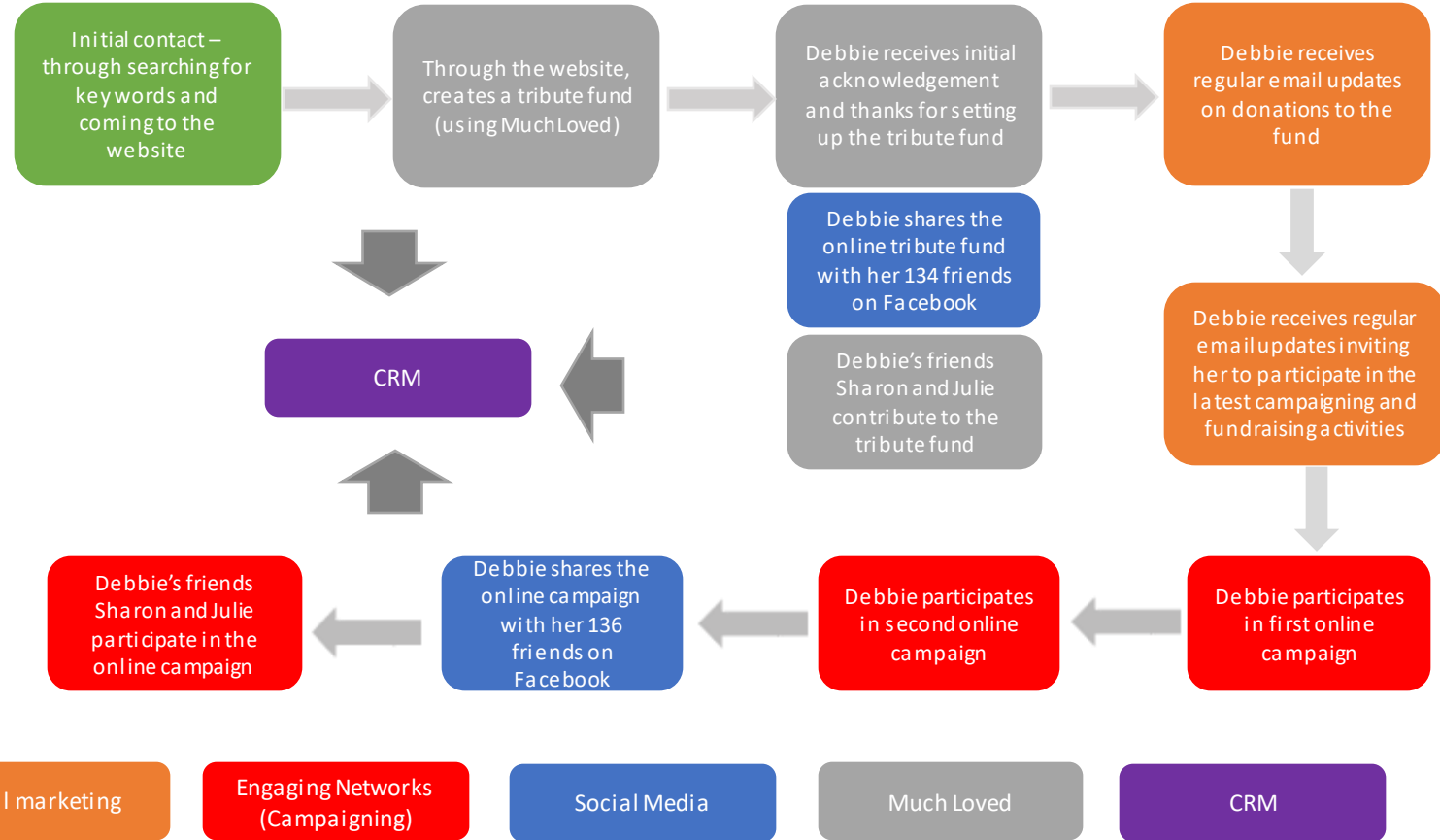


Supporter Persona

Who: Debbie, age 34, Bristol, 2 young children, environmentally aware, active on Facebook and Instagram

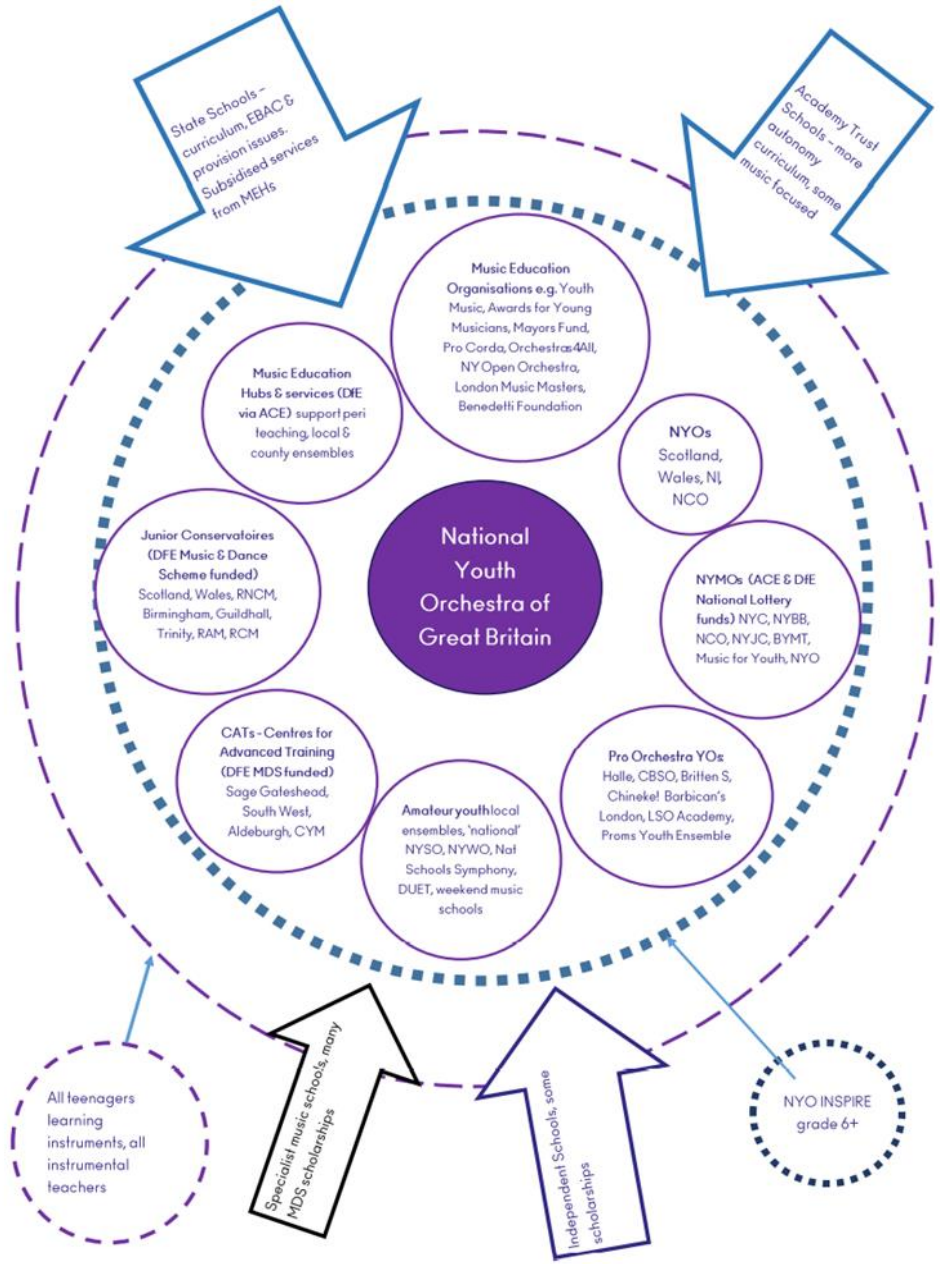
Why: Lost grandmother to ...

What they want from CHARITY X: To help remember her grandmother, get involved in campaigns, and to support the cause through donations and other fundraising opportunities.



What might a generic charity 'customer journey' look like?

Who are your audiences, and what do they expect from you?



What do they want?
Tailored stewardship that shows gratitude for their support & lets them know how it contributes

Audience Donors

What do they want?
Help to apply and participate, engage & continue their involvement once an alumni

Audience Young musicians & families

Activities & experiences
e.g. concerts, residencies, learning

What do they want?
NYO to help add to what they offer, opportunities to 'signpost' their young people to NYO

Audience Education, arts, culture

Audience Interested teenagers

What do they want?
To be enthused, inspired, connected, educated



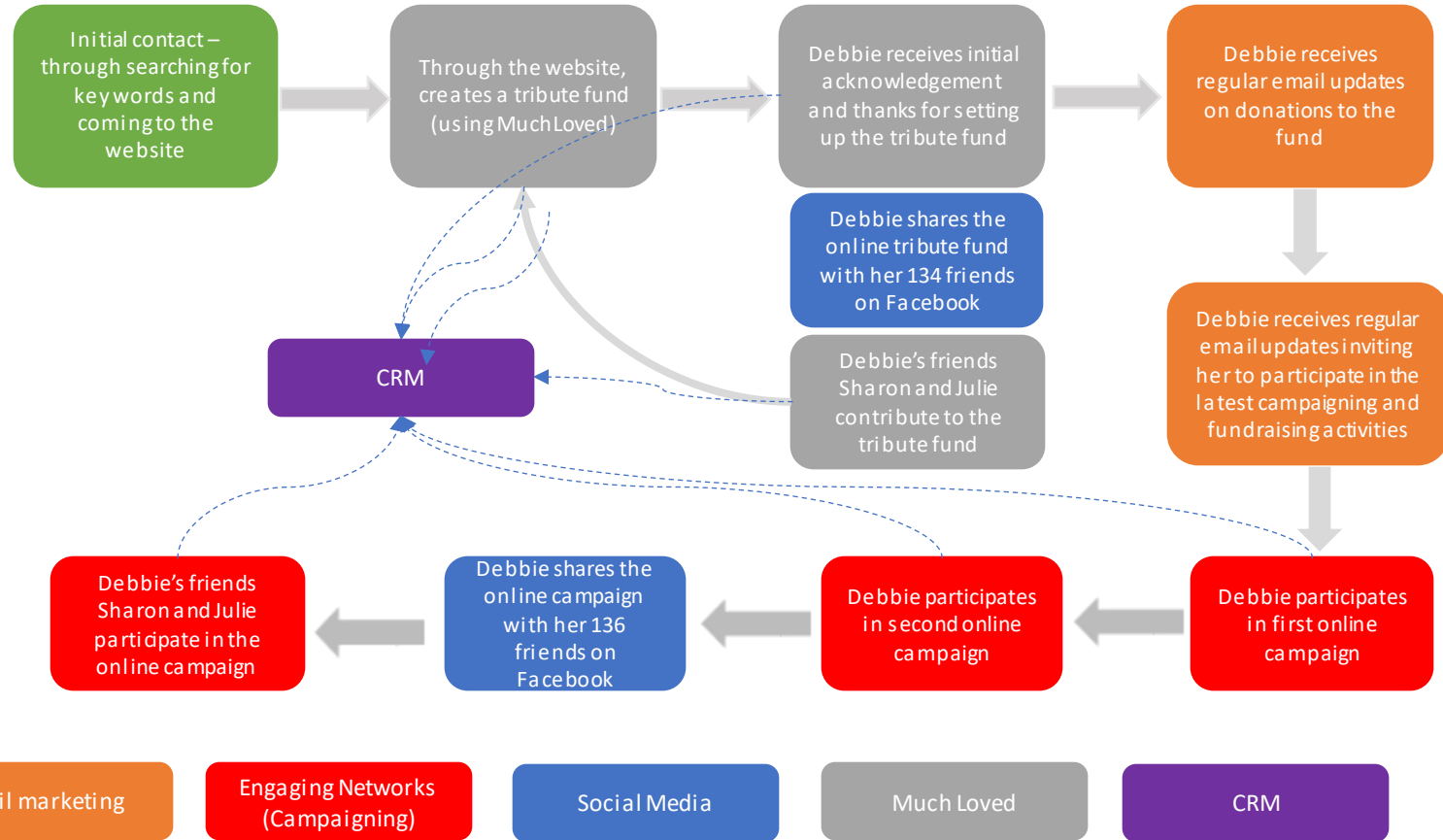
Customer Experience

Supporter Persona

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What do we notice here?

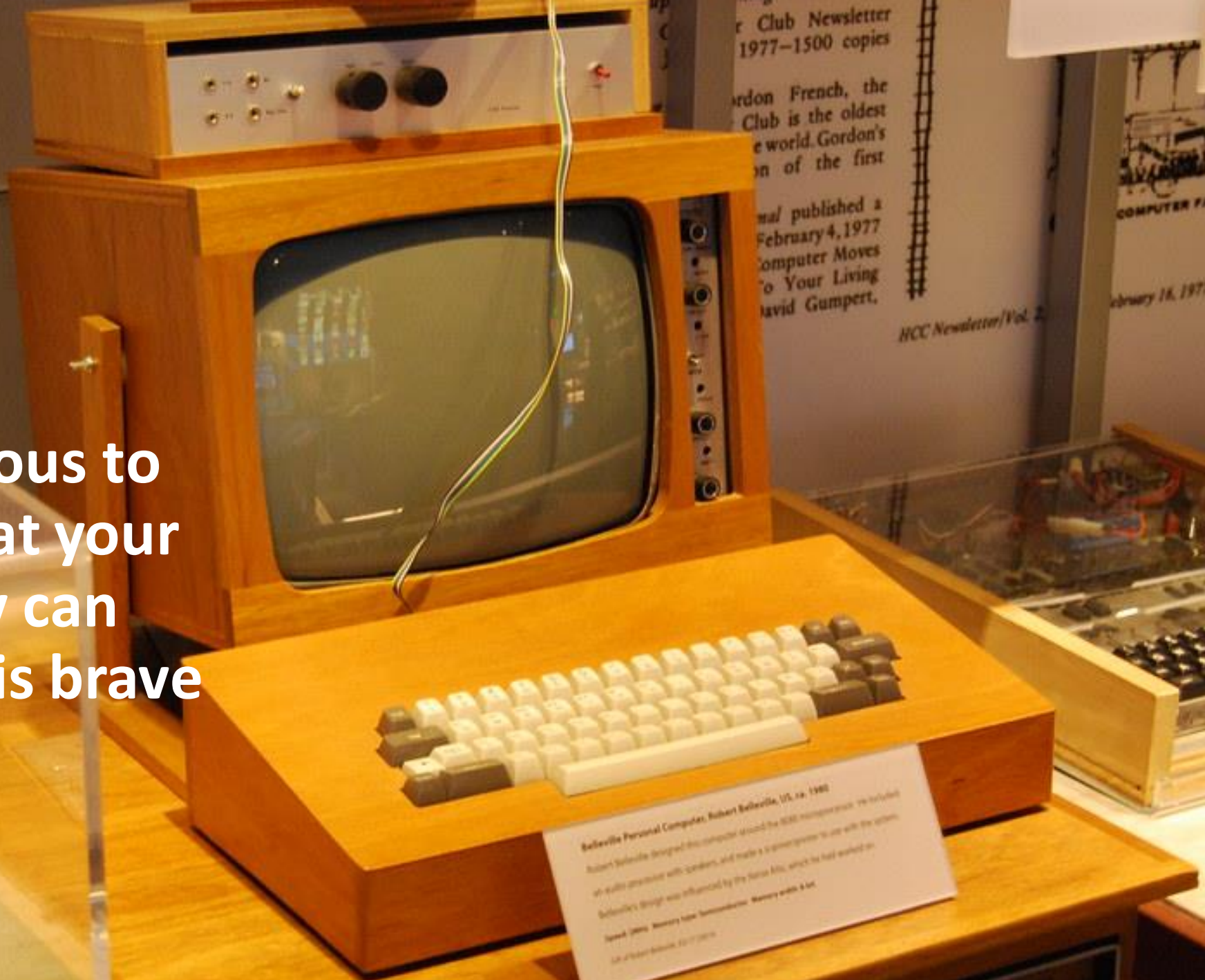
A woman with long brown hair, wearing a red blazer, is sitting at a desk. She is smiling and looking towards the right. She is holding a white credit card in her right hand and a smartphone in her left hand. The background is a blurred office setting. Overlaid on the image are various business and technology icons, including a line graph, a telephone, a shopping cart, a target, a dollar sign, and a checkmark. The text is overlaid on the right side of the image.

Your audiences are increasingly in charge of the whole experience. Sometimes using platforms and channels beyond your control!



And they are creating lots and lots and lots of data, in lots and lots of different places!

It's dangerous to
assume that your
technology can
support this brave
new world



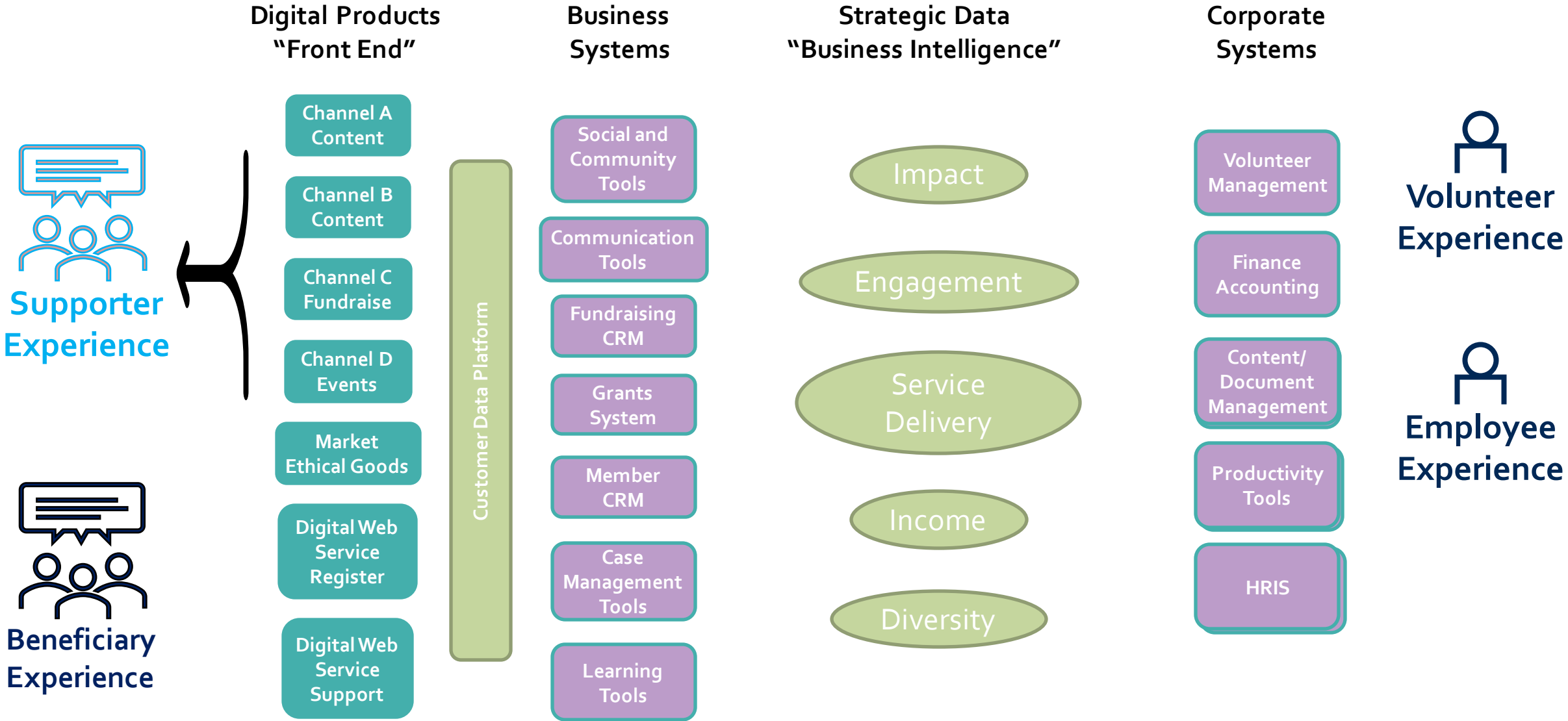
Bellville Personal Computer, Robert Bellville, VA, ca. 1980
Robert Bellville designed this computer around the 6502 microprocessor. He included an audio processor with speakers, and made a program generator to use with the system.
Keyboard (1980). Memory base (transmembrane). Memory with 8 bit.
© Robert Bellville, 2017/2018

Club Newsletter
1977-1500 copies
Gordon French, the
Club is the oldest
in the world. Gordon's
son of the first
magazine published a
February 4, 1977
Computer Moves
to Your Living
David Gumpert,
HCC Newsletter/Vol. 2

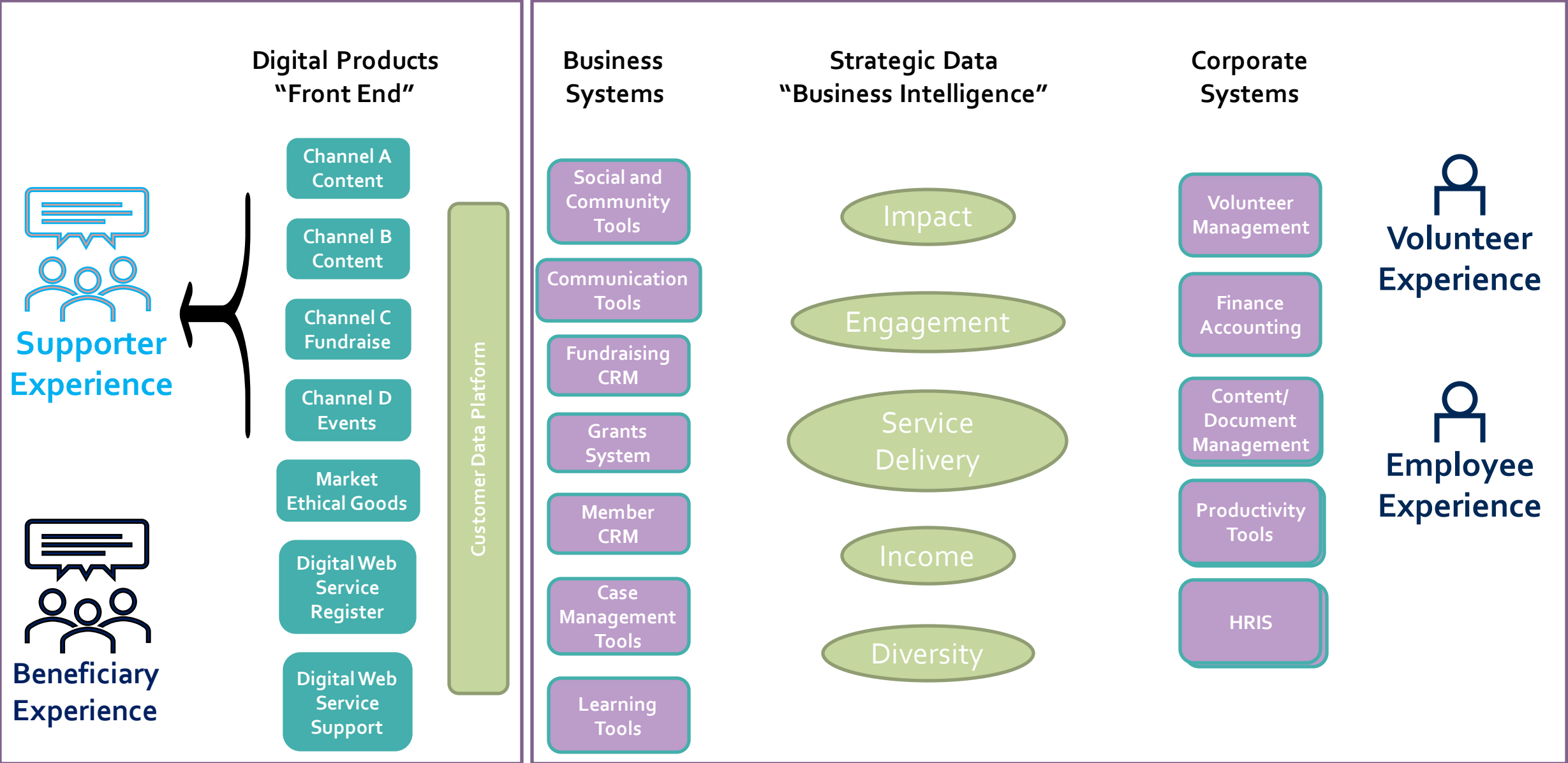
COMPUTER FAIRE
February 18, 1977

Determine your digital architecture

What technology and data do you need and how should everything integrate?



But when, how and for who was this stuff built?



Digital tools – all modern and sleek and trendy. Built using modern approaches with the customer in mind





Data infrastructure – built back in the mists of time. ‘Ramshackle’



So your digital transformation might require you to do some building work!

The National Youth Orchestra (NYO)

A young woman with dark hair tied back, wearing a black hoodie, is playing a violin. She is looking down at her instrument with a focused expression. In the background, other young people are also playing violins, and a conductor is visible in the distance. The scene is set in a concert hall or rehearsal space.

Mission: Activating teenagers' confidence, optimism, and skills through playing and sharing orchestral music.

Growth: Deeper social purpose, increased reach. More beneficiaries and more activity driving the need for more, and more sustainable, income.



Digital transformation objective:

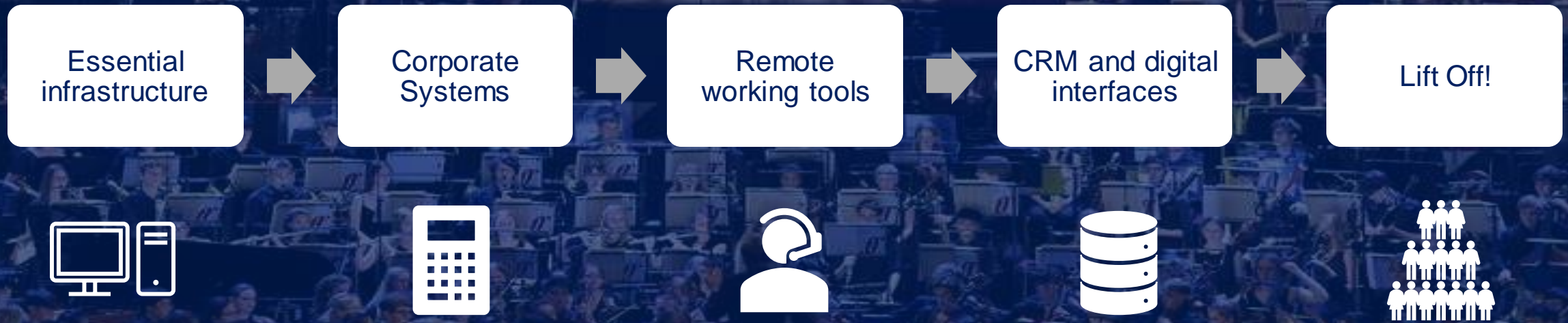
Scaling up efficiently and building organisational resilience whilst enabling exceptional supporter and beneficiary experiences

Five years ago...

- New CRM system! But not operationally ready
- Outdated, failing basic IT infrastructure (and culture of negativity)
- Direct Mail fundraising just kicking off – sacks of cheques arriving daily
- Proliferating spreadsheets!



NYO's Digital Transformation Journey



Stage 1: Infrastructure



- New IT support provider
- Migration to Office 365, SharePoint
- New hardware

Stage 2: Corporate Systems



- Cloud accounting (Xero)
- Digital invoice approval (ApprovalMax)
- HR Management (BreatheHR)
- Recruitment (JotForm)

(meanwhile battling on with the CRM system)



Stage 3: Lockdown! Remote working tools



- Zoom – also for service delivery
- Slack

(meanwhile battling on with the CRM system)

Strategic Review

- Step change in stakeholder engagement could only be delivered with a substantial tech upgrade: integrated CRM, web, digital marketing tools
- Digital thinking significantly developed during lockdown – that was all we had
- Commissioned Adapta





Stage 4: CRM and stakeholder interfaces

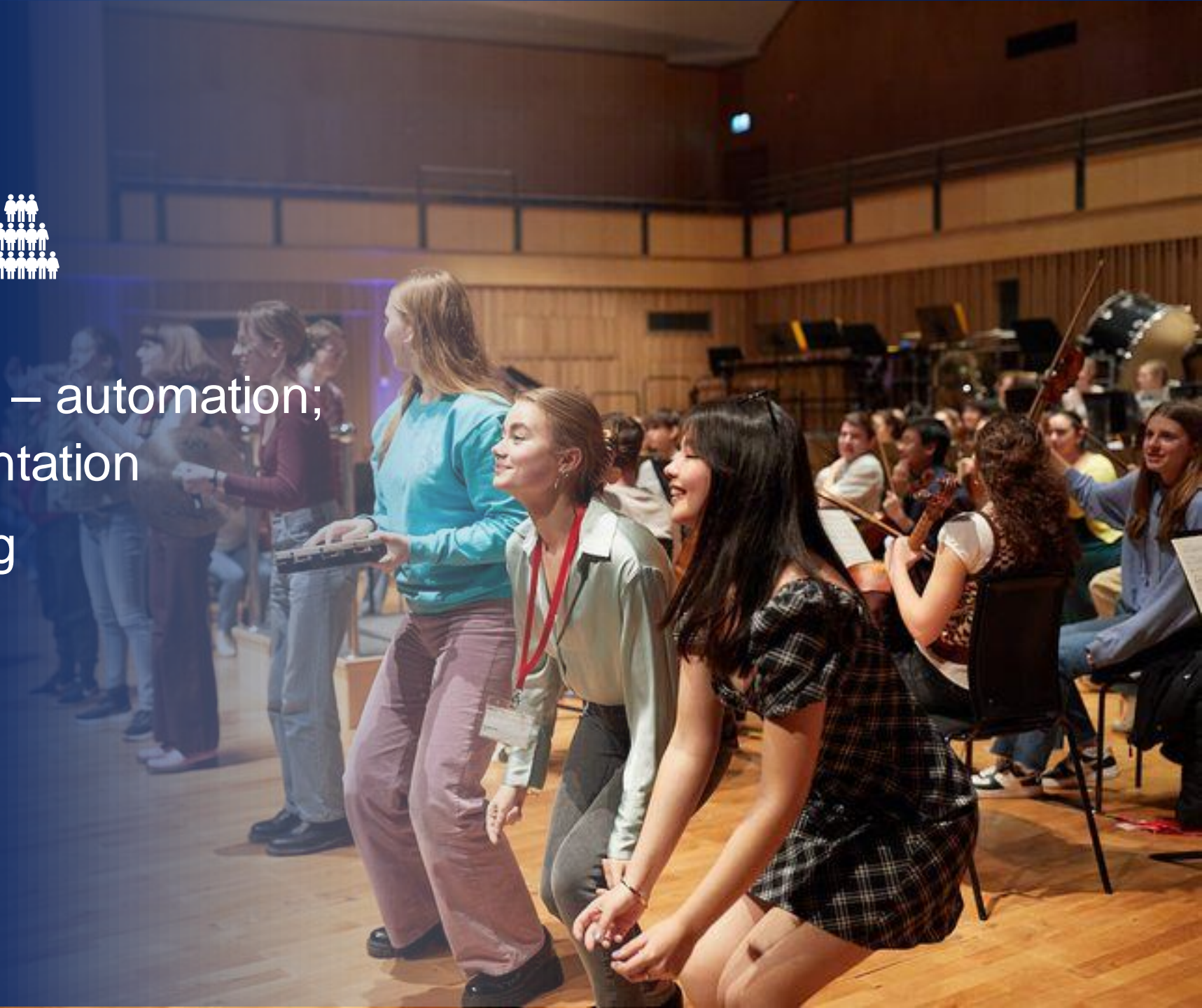


- Salesforce CRM – constituent management, fundraising, programme management
- Experience Cloud – musician portal
- Marketing Cloud – email marketing suite
- Website

Stage 5: Lift Off



- Digital marketing – automation; journeys; segmentation
- Digital fundraising
- Impact data
- Service delivery
- A.I....





Reflections

What are the internal 'pain points' that can get in the way of focusing on stakeholder needs?

Foundational work is vital

Don't try to do everything at once.

Reflections

Build allies and champions;
sometimes ideas need to be
drip-fed

Research. Dive into the app
marketplaces

Make the most of non-profit
pricing!



