Leveraging Technology for Remote Work

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Housekeeping Notes

- All audience members are muted

- Please use the **Q&A Feature** to submit questions

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Meet Our Expert!

Peter Campbell
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Topics

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The Virtual Workforce
- Connectivity, Communication, Collaboration

Technology Planning
- Goals, Methodologies, Components, Examples

Knowledge Management
- Goals, Document Management, Eliminating Chaos, Capturing Context

Constituent Relationship Management (CRM)
- What CRM Can Do for You, Options

Project Management
- Variety of Tools, Benefits of Having a Plan, Agile vs. Waterfall, Apps

Information Security
- The New Normal, Best Defenses, Policies, Tips and Tricks

Additional Resources

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About Marcum Technology

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- Marcum Technology, a subsidiary of Marcum LLP, is a full-service technology consulting firm focused on helping businesses with their technology needs.
- Peter Campbell works for Marcum Technology and with Raffa, Marcum's nonprofit practice.
- Ask Marcum about our:
  - Managed Services
  - Financial and ERP Systems Implementation and Support
  - Cybersecurity Services
  - Technology Assessments
  - Strategic Consulting
  - Fractional CIO work

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The Virtual Workforce

The Virtual Workforce: Connectivity

- Best: Cloud computing, aka "Software as a Service"
  - Office 365
  - Google Suite
  - Box, Dropbox, Etc.

- Less secure: Remote access to internal servers
  - Virtual Private Networks
    - Safer if only accessed by company-controlled machines
  - Remote Desktop Service
    - Resources can be overwhelmed
    - Constantly under attack
- MFA required
  - All remote access options should be secured by Multi-Factor Authentication

The Virtual Workforce: Communication

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Providing remote access is just the first step

- In virtual orgs, email and phone aren't sufficient
  - Video is critical
  - Corporate messaging improves productivity while keeping staff connected
  - Tools like Microsoft Teams or Slack make a big difference

- Formalized meetings are more important
  - Daily stand-ups keep teams coordinated
  - Regularly scheduled meetings and check-ins battle isolation

- Staying connected is critical

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The Virtual Workforce: Collaboration

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- Slack and Teams provide an integrated interface for:
  - Messaging (stream and chat)
  - Video
  - Information sharing

- Each use "Channels" to segment by departments, projects, or topics
  - Create channels for each team
  - Create org-wide channels for announcements and diversions

- Train and establish guidelines on when to use Slack or Teams, when to email, when to call.

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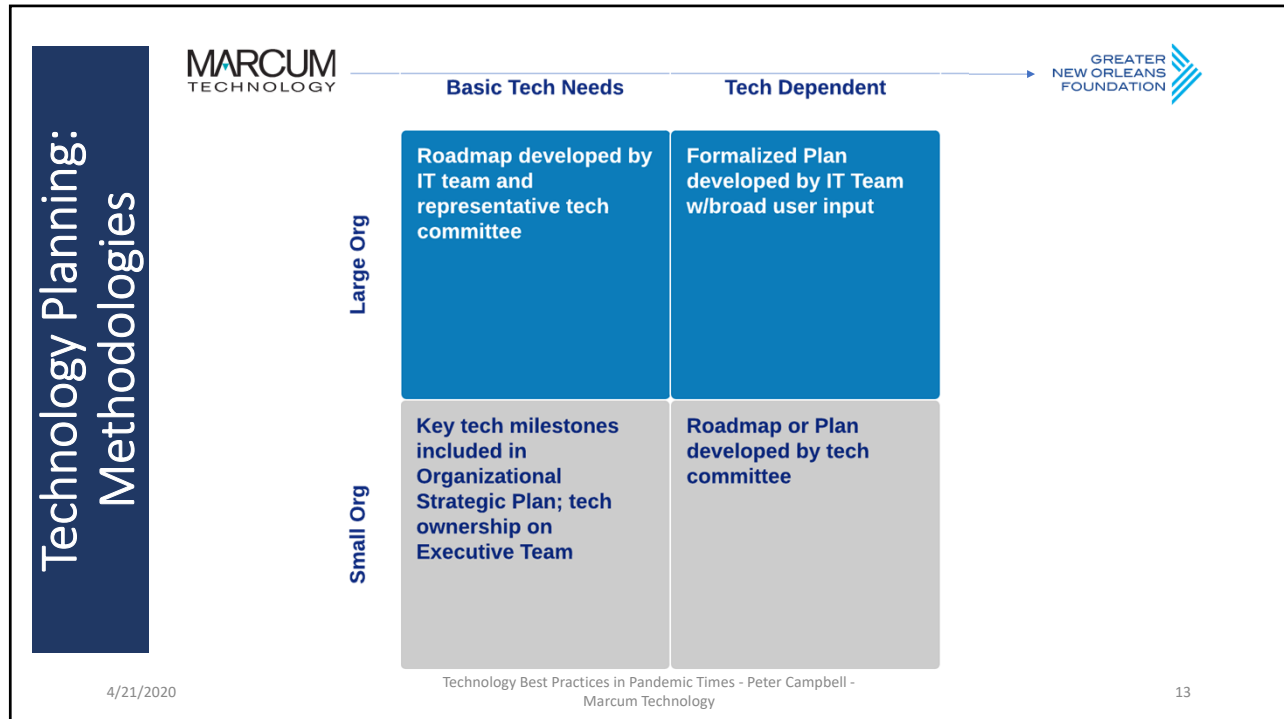
Technology Planning

Technology Planning: Goals

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A good technology plan will do the following:

- Describe the core strategies that will support the mission
- Define how technology is governed
- Draw a picture of what technology will look like at plan completion
- Explain the role that all staff play in technology implementation, support, and training
- Set up the metrics that will vet the plan's performance

Technology Planning: Methodologies

	Basic Tech Needs	Tech Dependent
Large Org	Roadmap developed by IT team and representative tech committee	Formalized Plan developed by IT Team w/broad user input
Small Org	Key tech milestones included in Organizational Strategic Plan; tech ownership on Executive Team	Roadmap or Plan developed by tech committee

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Technology Planning: Key Components

- IT departmental mission and objectives
- Core IT strategies (framed by organizational strategic plan, if it exists)
- Current state of technology
- Key operating principles
- Goals
- Measures of success
- Major initiatives
- Technology roadmap

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Technology Planning: Sample Roadmap

6/1 to 12/31	HRIS System	We will replace our HRIS system with a new one. Evaluations are currently underway. We are investigating whether this project should be expanded to include finance and payroll systems, as well.	$20,000	HR Director (Lead); HR; IT
8/1 to 12/31	Business Data and Process Evaluation	As we head into the major project of revamping our data management and reporting systems, we need to analyze and organize what we have. This is not an IT project, per se, but a necessary pre-cursor for much of what IT hopes to accomplish in this plan.	$2,000	VP Program (Lead); Program; Executive; IT; All Staff
10/1 to 12/31...	Unified Communications Upgrade	We will either upgrade or replace our phone system with a unified communications product that does voice, desktop video, instant messaging and more, and integrates with our computers and devices.	$20-25k	Systems Engineer (Lead); Systems Admin; CIO; IT; All Staff (evaluation, input)

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Technology Planning: Sample Metrics

Initiative	What to Measure	Assessors
New Reporting System	Efficiency gains	• Average time to prep for presentation to Funder • Site visit prep time • Staff feedback
Unified Communications	Increased functionality	• Adoption of mobile app • Number of staff who decline desk phones • Volume of video and chat use
HRIS System	Process automation	• Benefits portal use • Feedback on evaluation module • Feedback on Recruitment module

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Knowledge Management
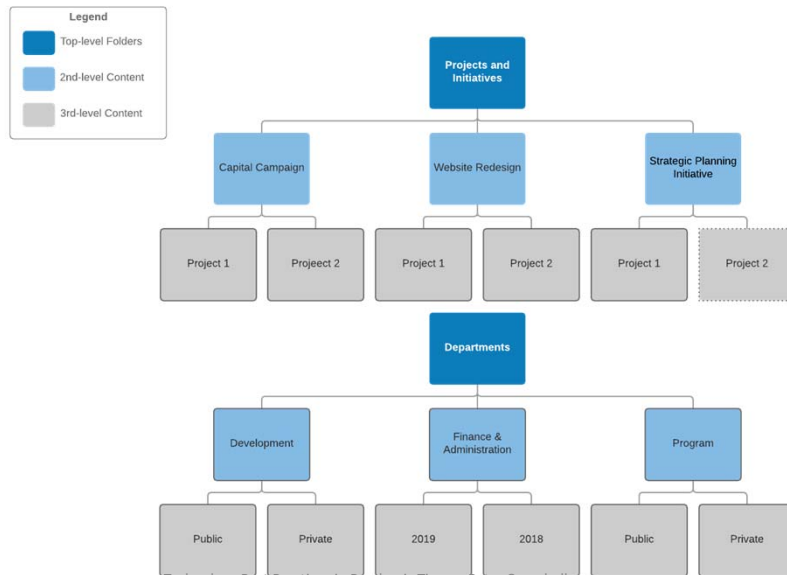

Knowledge Management: Goals

Knowledge management systems and practices serve to retain organizational knowledge as staffing turns over and streamline the creation and management of work product

- Key Components
  - Document Management
  - Meeting notes
  - Policies and Procedures

- Sub-goals:
  - Information security
  - Document retention
  - Information integrity

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Knowledge Management: Document Management

- Document Management does not require a Document Management System (DMS). It requires adoption of shared storage conventions.
  - Common folder structures (with exceptions)
  - Filename conventions
  - Metadata for searching and sorting

- Folders structures should be modeled on business processing with consideration for information security and archiving
  - Public and private folder structures with a "secure only if necessary" approach

Knowledge Management: Sample Folder Structure

Knowledge Management: Eliminating Chaos

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- Cloud-based systems, like Office 365, Google, and Box, let you send a link to a document instead of a copy.
- They automatically save a version of every edit that can easily be restored.
- They allow for collaborative editing
- Once finalized, there are no longer multiple copies of each document in various states of edit.
- Nobody needs to manually merge multiple edited versions into a finalized document.

Knowledge Management: Capturing Context

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Formalizing retention of meeting notes and purchasing justifications helps retain the thought processes behind key business decisions

- Designate a note taker for all key executive and project meetings
- Take pictures of important information shared on whiteboards
- Develop a procurement policy that requires a justification memo for significant expenditures
- Use and retain decision trees and/or maintain a written history of the reasons behind major organizational decisions.

Constituent Relationship Management (CRM)

CRM: What it Does for Your Org

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- For most nonprofits, managing the organization is all about managing people: donors, funders, clients, constituents, government, board, and staff
- Modern CRMs provide:
  - Basic contact management
  - Donor and donation management
  - Reports and Dashboards
  - Campaigns and pipelines
  - Workflow automation
  - Email marketing (or integration with email apps)
  - Interaction tracking
  - Centralized data

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CRM Options

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- Salesforce donation: 10 Free Enterprise licenses; additional licenses 66% off
  - Comes with Nonprofit Success Pack
- Microsoft Dynamics CRM: Deep discounts for nonprofits
  - Added nonprofit-specific data layer (at extra cost)
- Blackbaud CRM/Raiser's Edge
  - Donor management CRM; not as versatile as the above systems, but a more mature fundraising solution. Not discounted.
- Lower cost additional CRMs
  - Zoho CRM, Hubspot
- Business-specific CRMs
  - Association Management Systems

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Project Management

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Project Management: Variety of Tools

- Just as there are many types of projects, there are a variety of project management applications, some designed for complex, multi-user projects, others more for simple task management.

- Additionally, there are two major project management methodologies, and the apps will lean towards one or the other.

- Accordingly, there may not be a specific project management tool that meets all organizational needs. Sometimes two or three products are required for different departments and/or projects.

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Project Management: Benefits of Having a Plan

A Project Management Plan:
- Summarizes an initiative's goals
- Sets scope, milestones and schedule
- Keeps multiple parties on task
- Identifies pre-requisites and risks
- Manages workloads

- What doesn't a Plan do?
  - Go as planned
  - Keep anyone on task
  - Do the job for you
  - Communicate

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Project Management: Agile vs. Waterfall

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- **Waterfall** is the traditional project management methodology
  - The plan is fully developed before the project work begins
  - Focuses on plan, dependencies, resource allocation
  - Deadline driven
  - Best for large, structured projects with clearly defined outcomes
    - Construction, phone system installations
- **Agile** planning is iterative and allows for continual input as it progresses
  - Prioritizes communication, constant review, collaboration
  - Highly adaptable timeline
  - Best for opportunistic projects with flexible outcomes:
    - Software applications, web sites

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Project Management: Apps

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- Waterfall apps:
  - Microsoft Project
  - Smartsheet
  - Sharepoint (part of Office 365)

- Agile apps:
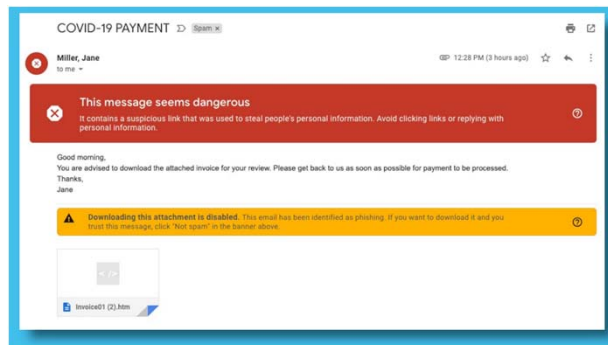 - Jira
  - Asana
  - Basecamp

- Useful app:
  - Trello

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Information Security

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Information Security: Pandemic-related Scams

- Cybercrime thrives on disruption. Attackers see any point of anxiety for the populace as an opportunity for fraud.
- Google is blocking 18 million Coronavirus phishing emails every day.

Information Security: The New Normal

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- Traditional security-related assumptions were that data was stored on servers in locked rooms and that users had only a handful of passwords, if that many.
- Today, our data lives all over the world and we have dozens, if not hundreds of passwords.
- "Hacking" has morphed from breaking into systems to manipulating people into providing access
- The skill level to commit cybercrime has dropped from "highly technical" to "equivalent to working at McDonalds". The key skill needed to commit cybercrime is knowing where to find the tools that do it for you.
- There is no such thing as a password that can't be hacked

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Information Security: The Best Defenses

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1. **Knowledge.** The more that everyone knows about how they will be attacked, the better they can defend against attacks. Security suites like KnowBe4, PhishMe, and Wombat provide easy to digest video training and testing to determine how savvy staff are.
2. **Pass-phrases.** The longer the password, the harder to crack. "My Le0pard has Flea$" is 20 characters long, easy to remember, and hard to crack.
3. **Multi-Factor Authentication (MFA).** Passwords alone aren't safe. Recent studies show that MFA prevents 99.5% of most attempts to hack a system.
4. **Single Sign-on or password management.** Eliminate the need to memorize multiple passwords.

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Information Security: Policy Matters

- Having clear policies on how to handle critical company data is important, as well as policies that prepare the organization for disruptions, such as security breaches or pandemics. Basic policies should include:
  - **Acceptable Use** – A basic policy on what should and shouldn't be done with company resources.
  - **Removable Devices** – do's and don'ts for company-owned equipment or personal items with company data on them.
  - **Incident Response** – the action plan for responding to breached information.
  - **Disaster Recovery/Business Continuity** – how the company will communicate and function in the case of a disruptive event
  - **Telecommuting** – requirements and expectations regarding work from home

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Information Security: Tips and Tricks

- **Move to the cloud:** Office 365, Google, Box, and Salesforce are all compliant with Federal security requirements and employee an army of security professionals. The case for cloud security is simple.

- **Use smartphone hotspots**: Café and airport wifi is just not safe (Hotel wifi, in rooms, is reasonably safe, but not in the lobby). Get hotspot service on your smartphone and use that instead.

- **Encrypt your laptop:** Windows 10 professional or third-party tools can encrypt your laptop so, if lost or stolen, it can't be accessed.

- **Monitor breaches:** Free tools like Have I Been Pwned and Firefox Monitor notify you if your credentials are exposed in a breach.

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Additional Resources

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Additional Resources: Nonprofit Technology

- **NTEN:** https://www.nten.org
  - The Nonprofit Technology Network is a membership organization that provides training, resources, and the best annual nonprofit tech conference.
- **Idealware (TechImpact):** https://www.idealware.org
  - Idealware seeks to be the "Consumer Reports" for nonprofits, with a library of articles comparing major NPO applications and advising on best practices.
- **Techsoup:** https://www.techsoup.org
  - Both an education/support resource like the orgs above, and an e-commerce outlet facilitating access to software donations for 501(C)(3)s.

Additional Resources: Nonprofit Licensing

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- **Techsoup:** Facilitates software (and some hardware) donations from many vendors, including Microsoft, Adobe, Cisco. Administrative fees required and some restrictions on licensing (per vendor), but this is a must-have resource for most nonprofits.
- **Office 365 and Dynamics:** heavily discounted for nonprofits registered with Techsoup.
- **Salesforce.org:** 10 free licenses and 2/3rd discount on additional
- **Box.org:** 10 free licenses and 50% off additional
- I'm reasonably sure that every product mentioned in this presentation discounts pricing for nonprofits. Some will require asking or googling "product nonprofit charity license".

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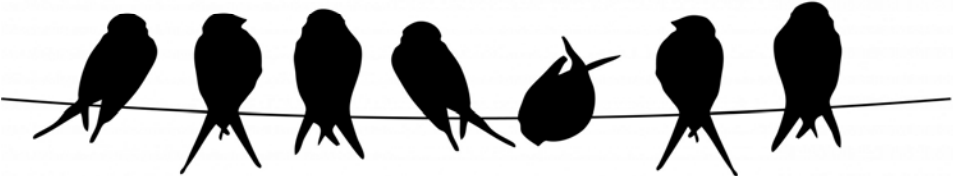415-845-8144
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• Please visit our COVID-19 page for resources and our other webinar recordings: https://www.gnof.org/covid19-nonprofits/

• Upcoming Webinars:
  ❖ Thursday, April 23rd from 11:00-12:30 pm—Nonprofit Essentials for Preparing for the COVID-19 Pandemic: Board Governance in a Crisis

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