Strategic Tech Toolkit

Free Resource from Mission-Driven Momentum Podcast

Practical tools and templates for using technology to support your strategic planning process—without overwhelming your team or breaking your budget.

PROJECT MANAGEMENT TOOLS

ClickUp
✓ Free tier: Unlimited users, 100MB storage, 5 Spaces
✓ Nonprofit pricing: Contact sales for discount
✓ Best for: Teams needing flexibility and unlimited users with minimal storage needs

Asana
✓ Free tier: 10 users max, unlimited projects/tasks
✓ Nonprofit pricing: 50% off - ~$5.50/user/month (Starter plan)
✓ Best for: Teams under 10 people or willing to pay for more users

Trello
✓ Free tier: 10 collaborators per workspace, 10 boards
✓ Nonprofit pricing: 75% off - Premium ~$2.50/user/month
✓ Best for: Visual/kanban-style thinkers, simple workflows

DOCUMENT COLLABORATION PLATFORMS

Google Workspace
✓ 100% FREE for 501(c)(3) nonprofits
✓ Includes: Gmail, Docs, Sheets, Slides, Drive (~100TB storage), Meet, Gemini AI
✓ Best for: Budget-conscious organizations, teams prioritizing collaboration

Microsoft 365
✓ ~$3/user/month (Business Basic) - free programs ended July 2025
✓ Includes: Outlook, Teams, Word, Excel, PowerPoint (web/mobile), 1TB OneDrive per user
✓ Best for: Organizations needing desktop Office apps or heavy Excel use

IMPLEMENTATION CHECKLIST

Before You Start

□ Identify your specific pain point (version control? task visibility? data tracking?)
□ Involve team members in tool selection process
□ Research nonprofit discounts and pricing
□ Verify tool integrates with systems you already use

During Pilot Phase (Weeks 1-6)

□ Select 3-5 pilot team members representing different roles
□ Choose one specific project or workflow to test
□ Schedule initial training session (1-2 hours)

□ Create quick reference guide (one-page cheat sheet)
□ Set up regular check-ins (weekly during pilot)
□ Document what's working and what's not

During Rollout (Months 2-3)

□ Have pilot team members lead training for broader team
□ Schedule office hours or drop-in support times
□ Create short video tutorials for common tasks
□ Set up dedicated communication channel for questions
□ Celebrate early wins and acknowledge challenges

During Adoption (Months 3-12)

□ Continue support but reduce intensity
□ Gather feedback on what could be improved
□ Adjust workflows based on how people actually use the tool
□ Recognize and support holdouts without forcing adoption
□ Document best practices as they emerge

REALISTIC EVALUATION TIMELINE

3 Months: Learning Curve Checkpoint

This is NOT when you evaluate success. This is when you check that people understand basic functions and there are no major technical problems.

Look for: Are people logging in? Do they know how to complete basic tasks? What questions keep coming up?

6 Months: Early Outcomes Assessment

Now you can start evaluating whether the tool is delivering value.

Look for: Is the tool making work easier or creating more burden? Can leadership see progress on strategic priorities more clearly? Are there visible time savings?

12 Months: Comprehensive Evaluation

This is when you evaluate whether the tool has become part of your organizational culture.

Look for: Is the tool integrated into how people actually work? Has it improved your ability to execute on strategic priorities? Would stopping use create problems?

TRAINING SESSION TEMPLATE

Duration: 60-90 minutes

Introduction (5 minutes)
• Why we're adopting this tool - what problem it solves
• How it will make your work easier (be specific)
• Timeline and support resources available

Demo: Core Functions (20 minutes)
• How to log in and navigate the interface
• How to view the strategic plan/projects
• How to find tasks assigned to you
• How to update progress on a task
• How to ask a question or flag a problem

Hands-On Practice (25 minutes)
• Everyone logs in on their own device
• Walk through one simple task together
• Let people explore with support available
• Answer questions as they come up

Common Scenarios (10 minutes)
• What to do when you complete a task
• What to do when you need help or get stuck
• How to add a new task if something comes up
• Where to go with questions after today

Q&A and Wrap-Up (10 minutes)
• Open questions
• Reminder of support resources (office hours, cheat sheet, etc.)
• What happens next (timeline for full adoption)

COMMON PITFALLS TO AVOID

✗ **No training or inadequate training.** Sending login credentials and expecting people to figure it out rarely works.

✗ **Top-down implementation without team input.** If people who use the tool daily aren't involved in choosing it, expect resistance.

✗ **Setting it up based on how you think work happens.** Observe actual workflows before designing new ones.

✗ **Trying to track everything.** Not everything needs to be in a system. Track what genuinely benefits from structure.

✗ **Evaluating too early.** Three months is when people are just getting comfortable. Give it 6-12 months.

✗ **Assuming technology fixes cultural problems.** If strategic priorities aren't clear or there's no buy-in, technology won't solve that.

QUICK START: YOUR FIRST 30 DAYS

Week 1:
• Identify your primary pain point
• Ask team: What's slowing us down? What's frustrating?
• Let pain point guide tool choice

Week 2:
• Involve 3-5 team members in testing options
• Have each person try the tool for a few days with real work
• Gather honest feedback

Week 3:
• Make decision based on team feedback
• Set up tool with one simple project - don't build everything at once
• Identify pilot team members who will test it first

Week 4:
• Schedule and conduct initial training
• Create one-page quick reference guide
• Set up office hours or support channel for questions

BEST PRACTICES FOR ADOPTION

DO:
✓ Involve your team in the decision
✓ Start with a pilot before full rollout
✓ Provide real training, not just a link to a video
✓ Create quick reference materials
✓ Set up ongoing support (office hours, help channel)
✓ Be patient - 3 months is just the learning curve

DON'T:
✗ Mandate a tool without team input
✗ Try to implement multiple tools at once
✗ Skip training or support
✗ Expect immediate adoption and culture change
✗ Use technology as a substitute for clarity about strategic priorities
✗ Over-systematize - not everything needs tracking

SIGNS IT'S WORKING

- People are logging in regularly without prompting
- Staff can clearly articulate who's working on what
- Leadership has real-time visibility into strategic progress
- Time spent on status updates and reporting has decreased
- Team members ask questions in the tool, not just in email
- Problems surface earlier and get addressed faster
- The tool has become "how we work" not "that thing we're supposed to use"

NEED MORE SUPPORT?

Podcast: Listen to Episode 5 at missiondrivenpod.com

Blog: Read the companion post for deeper examples and stories

Consulting: Want help choosing and implementing the right tools for your organization? Contact The Scanland Group at **contact@thescanlandgroup.com** or visit **thescanlandgroup.com**

From The Scanland Group:

Keep leading with heart, keep showing up with purpose,
and keep creating a world where everyone belongs.