WHITE PAPER

Buying time, not software

A systems change of 12 to 18 months does not have to be one large bet. Sequenced well, each stage returns something real on its own, and the board approves a step it can see rather than a leap it has to trust. How to plan that sequence, and how to run the decisions between stages.

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For
Anyone planning or running a systems change

Time to read
About 25 minutes

Use it
Before you ask the board for anything

A NOTE BEFORE YOU START

Nobody on your board wants software. They want the organization to work better, and proof before they approve the next step.

Most systems proposals ask a board to approve a destination: the new platform, live in eighteen months, at a total cost. It is an honest request. It is also very hard to say yes to.

Eighteen months is a long time to wait for evidence. Board members rotate. Staff leave. Priorities change after a bad renewal year or a new strategic plan. A program sold as one large commitment has no natural moment to look up and ask whether it is still working, so problems surface late and expensively.

The organizations I have seen do this well buy something different. They buy time: hours given back to staff early, and room to learn before committing to the next stage. Each stage is small enough to finish, useful enough to keep even if the program stopped there, and ends with a decision the board actually makes.

That is not timidity. It is how you keep the board steering instead of hoping. This paper sets out how to sequence the work, using a worked example, and gives you a template you can fill in this month.

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The short version

- Write down the destination. Fund only the next step.
- Every stage must pay off even if it is the last one.
- Data before automation. Automation before AI.
- Plan around renewal season and year-end, not through them.
- Each stage ends at a gate the board decides.
- Stopping at a gate can be a success.

Who should read it

The executive who will ask the board, and the person who will run the work day to day. The plan only holds if both of you believe it.

Worth remembering. A board that approves a step is not less committed than one that approves a leap. It is more involved, and an involved board is the best protection a program has.

01 · THE LEAP AND THE STEP

Large programs are hard to approve for the same reason they are hard to stop.

A leap is a program where nothing is useful until everything is finished. A step is a piece of work that is useful the day it ends.

The leap is the default because it matches how systems are sold. You choose a platform, plan the whole build, move every team across on one date and switch the old system off. On paper it is efficient: one design, one go-live, one round of training. In practice it asks the organization to carry all of the cost and all of the risk until the very end, with almost nothing to show in between.

That shape causes three problems that have little to do with the technology. The board has to approve the whole budget on faith, so it hesitates, and the item moves to the next meeting. Once approved, there is no natural point to change course, so a program that has drifted keeps going because stopping feels like failure. And staff wait a year or more for any relief, which is a long time to ask people who are already stretched to stay patient.

A step changes all three. The board approves an amount it can understand, for a result it will see within months. There is a planned moment to change course. And staff feel the first benefit early, which is what earns their patience for the harder stages.

THE LEAP

- Approve the destination and the full budget
- Value arrives at go-live, all at once
- Course correction means admitting a problem
- The board hears about progress

THE STEP

- Approve the next stage, with the destination in view
- Value arrives at the end of every stage
- Course correction is built into every gate
- The board sees results and decides

What you are really buying is time in two senses. Staff time returned early, because the first stages remove the work that costs the most hours. And decision time, because each stage teaches you something before you commit to the next.

02 · FIVE TESTS FOR A GOOD STAGE

A stage is not a phase of a project plan

Many plans are divided into phases that are only useful together: design, then build, then test. A stage, in the sense used here, has to pass all five of these tests.

1 **It pays off on its own**

If the board stopped the program at the end of this stage, would the organization still be better off? If the honest answer is no, the stage is a phase of something larger and needs to be redrawn.

2 **It finishes in roughly two to five months**

Long enough to deliver something real, short enough that the people who approved it are still in the room when it ends. Much longer, and it becomes a leap of its own.

3 **Its result can be measured by someone outside the project**

Hours returned, duplicates created each month, days to produce the board report, renewals sent on time. One or two measures, counted before the stage starts and again at the end.

4 **It leaves you better informed**

Every stage should answer a question the next stage depends on. How clean is the data, really? Will staff use the new screens? Does the integration hold up in renewal season? What you learn is part of what you paid for.

5 **It asks the team for one change at a time**

Staff can absorb a new way of working while still doing their jobs, but rarely two at once. A stage that changes membership and finance processes in the same month is two stages.

The quickest check. Write one sentence for the stage that begins "Even if we stop here, we will have..." If you cannot finish the sentence with something a member, donor or staff member would notice, keep redrawing.

03 · A SEQUENCE THAT USUALLY HOLDS

Understand, then one record, then the heaviest work, then reporting

Every organization is different, but the order below holds more often than not, whatever platform you run. Each stage depends on the one before it.

STAGE	WHAT IT DELIVERS	WHY IT COMES HERE
1. Understand and write down 4 to 8 weeks	A plain-English description of how the work is actually done today, every system and what it costs, the staff time lost between systems, and the destination on one page.	Everything later is designed from it. On its own, it gives the organization a record it owns.
2. One record you trust 3 to 5 months	One place for each member or donor, duplicates resolved, agreed definitions of "current member" or "active donor", and the busiest feeds connected so nobody re-keys them.	Automation and reporting built on two versions of the truth only move the argument somewhere else.
3. The heaviest work 3 to 5 months	The process that costs the most hours: renewals and dues reconciliation for an association, gift processing and acknowledgment for a nonprofit.	It returns the most time, and it can only be automated once the record underneath it is sound.
4. Reporting and self-service 2 to 4 months	Board and funder reports produced from one source, member or donor status visible to every staff member, and simple self-service where it helps.	Reports are only trusted once the data and the processes feeding them are.
Later. AI and beyond Its own decision	Drafting, summarizing and sorting, once the record is clean and the definitions are agreed.	AI is only as good as the data underneath it, so it belongs after the work that makes the data good.

Adding the ranges

The four stages add up to about 9 to 16 months of work. Add the pause at each gate and the weeks kept clear for renewal season or year-end, and 12 to 18 months is a realistic plan for most organizations.

When the order changes

A contract ending, a funder requirement or a failing system can pull a stage forward. Change the order deliberately, and write down what the moved stage now depends on.

04 · DECIDING WHAT GOES FIRST

Four questions settle most sequencing arguments

When two teams both want to go first, these are the questions to ask, in this order.

01

What does it depend on?

Data before automation, automation before reporting, all of it before AI. A renewal process cannot be automated reliably if nobody agrees who is a current member. Dependencies are not opinions; settle them first and most of the order follows.

02

Where are the hours?

Among stages that are free to go, start with the one that returns the most staff time. If you have counted the hidden payroll, the answer is on the worksheet. Early relief buys the team's patience for everything after.

03

What does the calendar allow?

Never plan a go-live inside renewal season, the annual conference, year-end giving, a grant deadline or the audit. Mark those weeks on the plan before anything else and build the stages around them. This single rule prevents more trouble than any other.

04

Who has to change, and are they free?

A stage needs time from the people who do the work, not just from the project team. If the membership team is already carrying a vacancy, a membership stage will wait whatever the plan says. Better to plan for it honestly.

WRITE THE DESTINATION ON ONE PAGE

Staging does not mean planning one stage at a time. Write down where the organization is going: the systems it will run, what each will own, how they connect. Keep it to one page and revisit it at every gate. Then fund only the next step. The page keeps the stages pointing the same way.

05 · A WORKED EXAMPLE

Lakeview Association: a 15 month plan in four stages

> **This is an example, not a client.** Lakeview Association is an example organization with illustrative figures. Take an association with 2,400 members and eight staff whose hidden payroll count found 868 hours a year spent making systems agree, of which it judged about 500 could realistically be returned. (The count is worked through in our paper *The hidden payroll*.)

Stage 1 Understand | **Stage 2** One member record | **Stage 3** Renewals and reconciliation | **Stage 4** Reporting and status

Gate, month 2 · Gate, month 6 · Gate, month 11 · Gate, month 15

STAGE	MONTHS	WHAT IT REMOVES (HOURS A YEAR, FROM THE COUNT)	HOURS RETURNED	RUNNING TOTAL
1. Understand	1 to 2	Nothing yet. Delivers the written description, the count and the one-page destination.	0	0
2. One record	3 to 6	Registrations re-keyed (72), renewals re-keyed (96), duplicate records (48), all in full	216	216
3. Renewals	7 to 11	Half of dues reconciliation (192 ÷ 2 = 96) and half of renewal list clean-up (96 ÷ 2 = 48)	144	360
4. Reporting	12 to 15	Half of the board report (160 ÷ 2 = 80) and half of member status checks (120 ÷ 2 = 60)	140	500
Total	**15**		**500**	

Why this order

Stage 2 returns the most hours and every later stage depends on it. Lakeview's renewal mailings start in month 12, so Stage 3 goes live in month 10, leaving two months to run old and new side by side before the first mailing.

What each gate shows

Month 6: re-keying hours and new duplicates per month, before and after. Month 11: reconciliation time for the last two months. Month 15: days to produce the board report, and the hours counted again.

The 84 hours of chasing chapters and CE certificates are left out on purpose: Lakeview judged that work as partly relationship work. If the board stopped the program at month 6, Lakeview would still keep 216 hours a year and a member record it trusts.

06 · THE TOOL

The staged roadmap template

One row per stage. If a cell is hard to fill, the stage is not ready to go to the board. Keep the one-page destination beside it.

STAGE	MONTHS	WHAT IT DELIVERS	"EVEN IF WE STOP HERE, WE WILL HAVE..."	MEASURE, BEFORE AND AFTER	DEPENDS ON
1					
2					
3					
4					
5					

FOR EACH STAGE, ALSO NOTE	WRITE DOWN
Weeks to avoid	Renewal season, conference, year-end giving, grant deadlines, the audit.
Who has to change	The teams whose daily work changes, and whether they have the time.
Cost	One-time and yearly, in your own figures. Ranges are fine when they are honest.
What you will learn	The question this stage answers for the next one.
The gate	The date the board decides, and what it will see.

A good sign. When you read the "even if we stop here" column aloud, each line should sound like something a member, donor or staff member would thank you for. If it sounds like a project milestone, redraw the stage.

07 · RUNNING THE GATES WITH THE BOARD

A gate is a decision, not a progress report

At the end of each stage, the board makes one of three decisions. It sounds formal. In practice it is a short item on the agenda, prepared in advance, that takes ten minutes when the stage has gone well and considerably longer when it has not. Both are the gate doing its job.

Continue

The stage delivered what it promised. The next stage still makes sense against the one-page destination. Approve it.

Adjust

The stage taught you something that changes the next one: the data was worse, a team needs more time, a priority moved. Approve the redrawn stage.

Stop

The organization has what it needs for now, or the next stage no longer earns its cost. Keep what was delivered, and record why.

The gate paper, on one page

SECTION	WHAT GOES IN IT
What we said	The stage, its cost and its measure, exactly as approved. No rewording.
What happened	The measure before and after, in the same units. Cost against budget.
What we learned	The answer to the question this stage was meant to settle.
What changes	Anything the learning changes in the next stage or the destination.
The decision	"Approve stage three at this cost. We return in month eleven with these measures."

Stopping can be a success. A board that stops at a gate because the organization already has what it needs has spent less and kept everything it paid for. That is only possible because every stage was built to stand on its own. Say this to the board at the first gate, not the last.

Report the miss as plainly as the win. If a measure moved less than promised, say so first, with the reason. Boards forgive a shortfall they hear about from you. They remember one they discover.

08 · WHAT STAGING COSTS YOU

The honest trade-offs

Staging is not free, and a paper that pretends otherwise should not be trusted. Here is what it costs, and how to keep each cost small.

THE COST	WHAT IT LOOKS LIKE	HOW TO KEEP IT SMALL
Some overhead	A gate paper, a board item and a short pause between stages. Several small launches instead of one large one.	Keep the gate paper to one page. Plan the next stage during the last weeks of the current one.
Some temporary work	A bridge between old and new systems that is used for a few months and then retired.	Keep bridges simple and say up front which ones are temporary. The one-page destination shows where each is heading.
Stopping half-built	A program paused after stage two because the urgency faded, leaving two systems where you planned one.	This is why every stage must pass the first test. If it stands on its own, a pause is a choice, not a mess.
Pricing built for the whole	Licenses, contracts or partner proposals that assume the full program from day one.	Ask for pricing by stage and for licenses to grow with the stages. A good partner will plan it that way with you.
Change fatigue	Staff asked to adopt something new every few months for over a year.	One change per team at a time, a visible benefit at each stage, and a quiet period after each go-live.

Set against these, the leap carries one large cost that is easy to overlook: the price of finding out late. A problem discovered at month four of a staged program changes one stage. The same problem discovered at month fourteen of a single program can change everything after it.

When a leap is right. Occasionally the old system is failing, or a contract ends on a fixed date, and there is no safe way to run old and new side by side. Then say so plainly, and use the gate paper anyway, at each milestone, so the board keeps steering.

WHAT TO DO NEXT

Two steps before the next board meeting

You can start without a vendor, a budget or a decision. You need one page and one honest conversation.

01 Write the destination on one page

With the people who run membership, development, finance and programs, write down where the organization's systems should be in 18 months: what each system owns, where each record lives, how they connect. Plain English, no product names unless you have already chosen one.

02 Draw the first two stages and test them

Use the template on page 8. For each stage, finish the sentence "even if we stop here, we will have..." and mark the weeks to avoid. Take only the first stage to the board, with the second shown as what comes next. Ask for a step.

Something to notice along the way. If you cannot yet write the first stage, the first stage is understanding. That is not a delay. It is the step everything else is built on, and on its own it gives the organization a written record of how its work is done.

IF YOU WOULD LIKE A SECOND PAIR OF EYES

The Digital Readiness Blueprint

The Blueprint is built as a first stage of exactly this kind: four to six weeks, fixed fee, vendor-neutral, ending in a plan in stages and a board deck in your voice that you can present without us. If you would rather start on your own, the readiness scorecard on our site is a good first look.