THE DIGITAL READINESS BLUEPRINT

# Discovery before the build

Before an association or nonprofit commits six figures to a new system, it should know what every team needs, what it already pays for, and what to change first. The Blueprint puts all of that on paper in four to six weeks, in a form your board can approve and any implementation partner can quote from.

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**For**
Anyone planning a change to their organization's systems

**Time to read**
About 10 minutes

**Best timing**
6 to 18 months before a change

01 · WHY DISCOVERY COMES FIRST

# Every implementation has a discovery phase. The question is whose interests it serves.

When a vendor runs discovery, it is shaped by their product. The questions are about how your work fits their system, and the answer is almost always their system.

That is not bad faith. It is simply the wrong order. The decisions that matter most come before any product: what each team actually needs, what the current setup really costs, which problems are worth solving first, and whether replacing anything is the right move at all.

We built the Blueprint to answer those questions on your side of the table. It is a full discovery, done before you choose, that belongs to you. Take it to any partner, including us, or decide you do not need one. Either way, the money you commit next is committed with your eyes open.

**Sunil Dua**
Kloudserv

### In one paragraph

A fixed-fee discovery of four to six weeks for associations and nonprofits with budgets of about $500K to $10M. We talk to each of your teams, list every system and what it costs, map how information moves, weigh the options without favouring any vendor, and give you a plan in stages with a board deck in your voice.

### Quoted before you commit

The fee is fixed and depends on how many systems you run and how many people we interview. You know it before anything starts.

02 · IS IT RIGHT FOR YOU?

### It is a good fit if

- A new membership system, CRM or donor database is likely in the next 6 to 18 months
- A major contract renews soon and nobody has weighed the alternatives
- The board is asking what you spend on technology and what you get for it
- One or two people hold the knowledge of how it all works
- You are applying for a capacity-building grant

### It is probably not the right step if

- You have already signed with an implementation partner and scoped the work
- You need one specific fix, not a decision
- Nothing is likely to change in the next two years

In those cases we will say so, and point you to what fits better.

03 · HOW THE WEEKS RUN

# Four conversations, four to six weeks, one document

Most of the work is ours. Yours is mostly conversation and checking.

WEEK 1

### Kickoff and intake

A call to agree goals, who we talk to and how deep we go. You send a short list of your systems; it does not need to be complete.

WEEKS 1 TO 3

### Interviews and costs

45-minute conversations with three to six people: leadership, programs or membership, operations and finance, whoever owns the data. Then you check a pre-filled list of every system and its cost.

WEEK 3 OR 4

### Findings readout

We present what we found. Your team corrects anything we got wrong and ranks every requirement: urgent, important, nice to have, or not needed.

WEEKS 4 TO 6

### Delivery

The recommendations, the plan and the board deck, built on the picture your team checked. We walk you through it, and follow up two weeks later.

## What we need from you

**3 to 6 people**
for one 45-minute conversation each

**A list of systems**
names and owners to start; we fill in the rest

**Your invoices**
so every cost in the Blueprint is your number, not our estimate

### Two depths, chosen at kickoff

**Standard:** requirements captured broadly and ranked, enough to decide and plan.

**Implementation-ready:** interviews go deeper, so the requirements are detailed enough for a partner to scope from directly. Whichever partner you choose, their discovery shrinks by weeks.

WHY YOUR TEAM RANKS THE REQUIREMENTS

The plan is sequenced by your priorities, not our reading of the interviews. Every number and priority in the Blueprint has your team's hand on it, which is what makes it hold up in front of a board.

> Our needs and goals as an organization were prioritized by Kloudserv, and they worked diligently and quickly to determine solutions and recommendations.

Reed Lievers, Pollinator Partnership

04 · WHAT YOU RECEIVE

# Everything is yours to keep and share

One analysis, delivered in the forms you will actually use.

| DELIVERABLE | WHAT IT IS | YOU USE IT FOR |
|---|---|---|
| **The Blueprint** | The complete document: findings, risks rated, recommendations, roadmap and quick wins | The reference for every decision that follows |
| **Decision summary** | Two pages in business language: the problem, the options, the cost of standing still, the decision asked | The board packet |
| **Board deck** | 8 to 10 slides in your voice, with speaker notes, ready to present without us | The board meeting |
| **Requirements register** | Every need, numbered, with who raised it, which systems it touches and your team's priority | Any vendor's proposal request |
| **Costed systems inventory** | Every system with its annual cost, owner and renewal date | Every budget season |
| **Systems map** | One page showing how information moves between systems, and where it is typed in twice | Seeing the problem at a glance |
| **Roadmap** | 12 to 18 months in quarters, each stage useful on its own, with owner and change impact | Funding in stages |
| **Quick wins** | Low-cost changes for the first 30 days, often including subscriptions you can cancel | Value in the first month |
| **Findings readout deck** | The slides from the readout, for anyone who missed it | Bringing staff along |

**Vendor-neutral, in practice.** The register describes what you need, not what any product does. The options include keeping what you have. Where nonprofit pricing exists for a tool, we note it, whoever sells it.

05 · WHAT IT LOOKS LIKE

# Excerpts from a Blueprint

Lakeview Association of Community Health Workers (fictional)

**$1.9M**
budget, 9 staff

**9 systems**
1 automated connection

**$14,900**
a year in software

**22**
renewals lapsed unnoticed

## From the requirements register

| ID | WHAT THE ORGANIZATION NEEDS | RAISED BY | PRIORITY |
|---|---|---|---|
| R-001 | One member record that every tool reads from | Executive Director, Membership | Urgent |
| R-002 | Renewal reminders at 90, 30 and 7 days, sent automatically | Membership | Urgent |
| R-004 | Event registrations flow into the member record on their own | Programs | Important |

### From the findings

**Renewal and education records depend on one person, with no written procedure.** Asked for it, she said: "It's in my head. I've been meaning to write it down for two years."

Critical

### From the options

**Path A:** make the current system work properly. Lowest cost; limits remain.

**Path B:** move to a CRM-based membership platform. Higher investment; removes the limits. Decide before the August renewal.

## From the roadmap

**FIRST 30 DAYS**
Written procedures; two overlapping tools cancelled (about $2,300 a year)

**QUARTER 1**
Clean member data; one member record; automatic renewal reminders

**QUARTER 2**
Education credits into the member system; email lists kept current

**QUARTER 3**
Full giving history; a leadership dashboard

### From "the cost of standing still"

None of this requires a prediction. Member data is kept in four places; the process that keeps them consistent exists in one person's memory; 22 renewals lapsed unnoticed last year. The strategic plan calls for 20% membership growth, which would run on exactly these processes, with the same nine people.

06 · HOW ORGANIZATIONS USE IT

### With the board

The decision summary goes into the packet and the deck is presented by the executive director, asking for one stage at a time.

### With vendors

The register goes with every proposal request, so quotes are comparable and discovery is shorter.

### With funders

A documented current state and a plan in stages support capacity-building grant applications.

## Questions people ask us

**Do we have to use Kloudserv afterwards?**

No. The Blueprint is yours and written so any partner can use it. Many organizations run the quick wins themselves.

**Will you just recommend Salesforce?**

No. The options are weighed on your needs, including keeping your current system. Sometimes staying and fixing three things is the right answer.

**How much staff time does it take?**

About 45 minutes for each person interviewed, an hour at the readout, and some time checking costs against invoices.

**What does it cost?**

A fixed fee, quoted before you commit, based on how many systems you run and how many people we interview.

**Is our data safe?**

We work from conversations and your system list. We do not need access to member or donor records.

**What if we disagree with a finding?**

Good. The readout exists for that. Corrections are folded in before any recommendation is written.

PLANNING A SYSTEMS CHANGE?

### A 20-minute conversation is the first step

We will tell you honestly whether a Blueprint makes sense for you, and quote it if it does.

Talk it through with us