

Critical Steps for Effective Technology Implementation



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February 10, 2026



Implementing new technology offers your nonprofit's finance department the opportunity to operate with greater efficiency and effectiveness. However, to fully realize these benefits, it is crucial to establish and adhere to a formal process before moving forward with implementation.

Skipping these essential steps increases the risk of choosing a system that does not meet your needs, resulting in wasted resources and a failed implementation. I recommend the following steps:

1. Operational Review and Evaluation

Before selecting and implementing any technology, take time to identify the areas within your finance department where technology could have the most positive impact. This process begins with a thorough review, documentation, and evaluation of your current financial operating procedures. The purpose of this operational review is to pinpoint inefficiencies, gaps, and breakdowns in your existing procedures.

This evaluation will also help you determine whether these issues can be resolved by implementing technology or if changes in procedures are needed instead. For instance, you may discover that two staff members are performing the same tasks, which signals a potential procedural inefficiency.

2. System Assessment and Selection

Once you have identified the specific areas where technology is necessary, the next step is to assess and select the appropriate system. Begin by choosing a software vendor that can best accommodate your requirements. If your organization requires system customization, be sure to review a demonstration in a test environment to see how the solution works in practice. Additionally, confirm that the new system can integrate with your other existing systems, especially if you use multiple platforms.

3. Project Plan

Establishing a clear project plan is fundamental to successful technology implementation. Assign an internal team lead who will coordinate and oversee the project and serve as the main point of contact between your staff and the software vendor. Define the objective of the project and determine how you will measure success. Develop a detailed timeline that outlines each phase of the project, including implementation, testing, and final rollout.

4. System Implementation

Extensive testing of the system is essential prior to rollout. Testing helps ensure that the technology functions as intended and reveals any glitches that need to be addressed. Launching a system with unresolved issues can erode end-user confidence in its reliability and usefulness and can result in wasted time.

In addition to testing, provide comprehensive training to all end-users, especially if your system has been customized. If the training materials supplied by the vendor are insufficient, invest the time to create your own resources that address your organization's specific system.

Conclusion

By carefully assessing your technology needs, selecting the right vendor, and planning every stage of implementation and rollout, you will enhance the experience for end-users and significantly improve the efficiency and effectiveness of your financial operations.

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