3 Tasks to Cross-Off Your List Before **Implementing a New GMS**

Congratulations, you've made a decision to implement a Grants Management System (GMS). When structured properly, it will power your organization to deliver even more to the nonprofits you support. So, now what? The next step is readiness—get the necessary pieces in place so you're ready to hit the ground running. Doing a thorough job up front will help to avoid missteps once implementation begins. Start with these tasks to get your GMS set up.

IDENTIFY YOUR PROJECT TEAM

It's essential to have a dedicated team in place before you start. Remember, the team is NOT everyone who will be using the system once it's implemented. Instead, you want a concentrated team of users who are intimately familiar with your current grants system and grants process.

Think about who can best fill these roles:

- **Executive sponsor** – The person who will ultimately say "yah" or "nay." They aren't necessarily a day-to-day member but, they make key decisions and have final signoff

- **Project lead** – This individual coordinates feedback and is the primary contact with your implementor on a daily basis. They may also have some decision-making authority

- **Project team members** – These are your "super users," the go-to techie people in their department. They will be key in fostering the adoption of the new system

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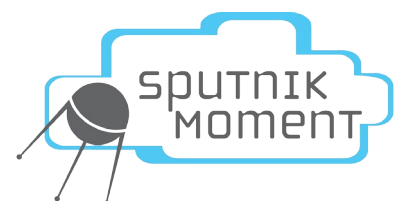
ESTABLISH A PREP TIMELINE

This is where you answer the question, "When can we start?" Establishing a working timeline accomplishes several key objectives. It ensures you have the information needed to start and assesses what competencies are already available (and what's missing). That helps size the project. It also helps to set expectations for the project.

The amount of preparation needed will depend on whether these key elements are present:

• Well-established and documented workflows

• Use of "as-is" or "to-be-refined" processes

• Access and familiarity with how the data is organized

• Clearly identified deliverables for each step in the application process

• Technical competency

Depending on where your organization falls on each element, the prep time can range from two to ten weeks. Longer timeframes allow time to refine and document workflows before you start.

GATHER KEY RESOURCE DOCUMENTS

You'll know you're ready to begin implementation when your preparation efforts produce the following documents. Think of it as having all of your ingredients measured out before you start cooking a gourmet meal.

• **Documented business/grant management process** – Ensures the system is structured so it's compatible with your workflows

• **Sample extract of current data** – Points the system in the right direction to retrieve data. Might also include a data dictionary so everyone speaks the same language

• **Samples of current email and/or merge templates** – Gives a jumping off point for the emails and documents that you want to generate from your system

• **List of questions you want your data to answer** – Helps to steer what analytics and reporting is needed

Readiness is an important first step in any successful GMS implementation. The time you invest in this phase pays off with minimal delays and produces the results you expect.

Our in-house experts understand the grant process and can identify best practices used by other foundations. That means you have access to state-of-the-art resources to optimize what your new GMS does. We help make the readiness phase go smoothly, contact Sputnik Moment today at 646.291.2136 or info@sputnikmoment.com.