

# BPM

## **Digital Transformation in the Age of COVID-19**

May 14, 2020  
10:00 am – 11:00 am PT

## Our Panelists

### Speakers

#### **Shannon Winter**

Partner, Assurance

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#### **Brit Tompkins**

Director, Technology Solutions

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**Who led the digital transformation of your company?**

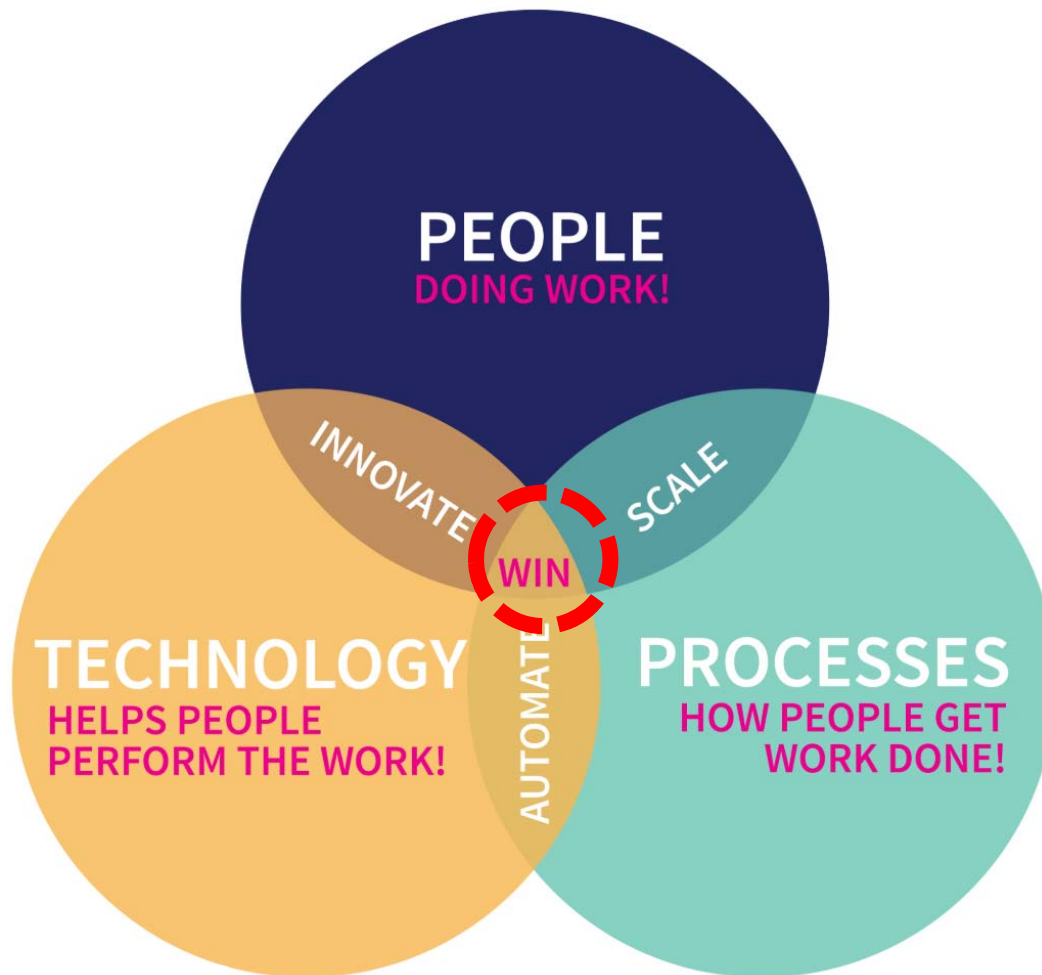
**A) CEO**

**B) CTO**

**C) COVID-19**

# **DIGITAL TRANSFORMATION**

Digitalization = People, Processes, Technology



# What Does Digitalization Mean for My Nonprofit?



IS YOUR  
ORGANIZATION  
READY?

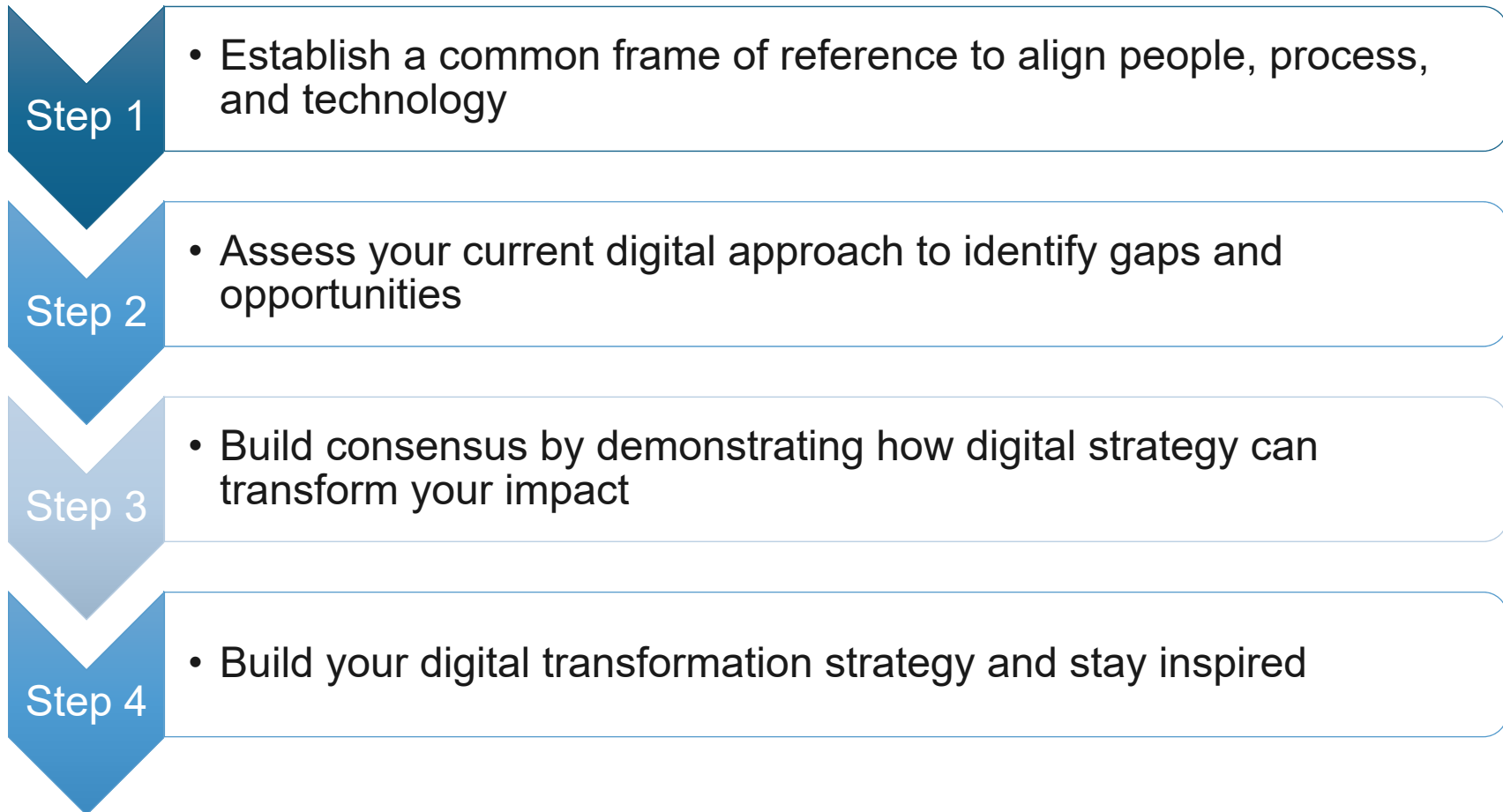
# Is Your Organization Ready?



Source: NetHope. Link to their free Digital Nonprofit Ability Assessment: <https://nethope.typeform.com/to/dUfqgg>

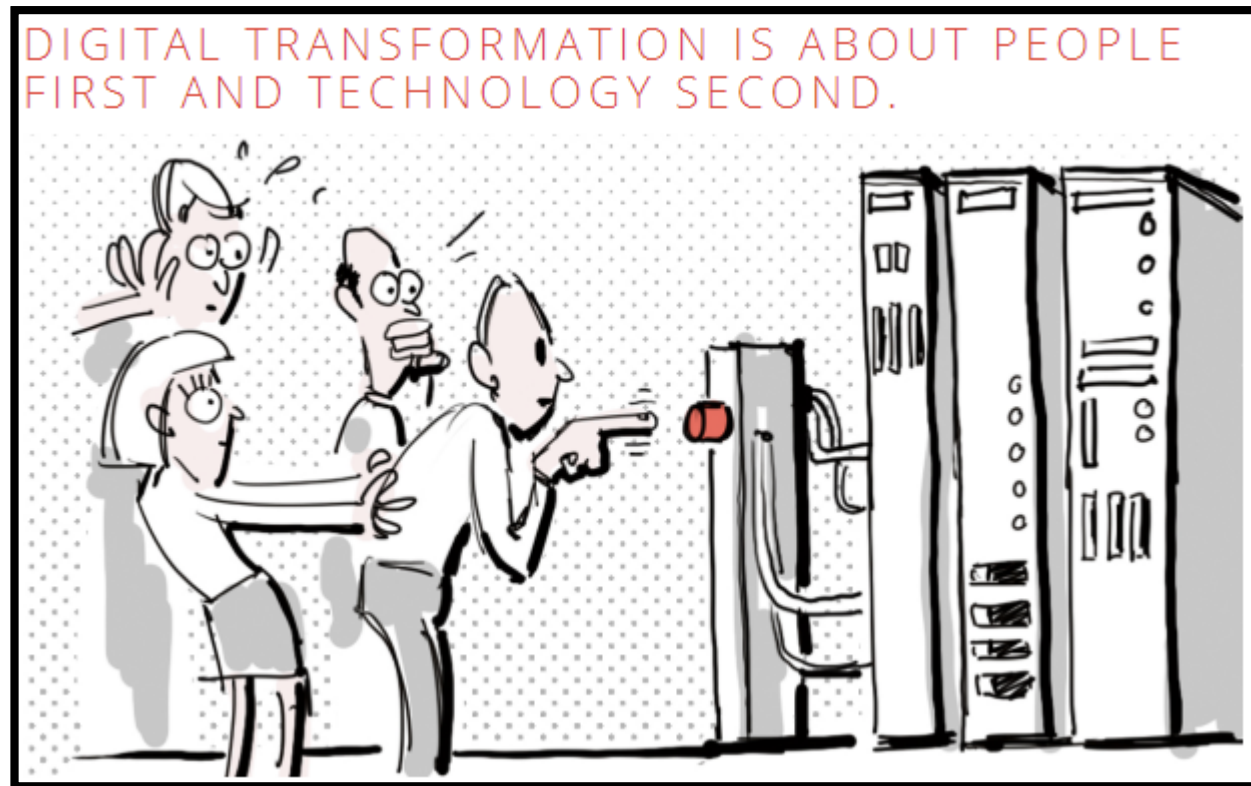


# How to Get Started

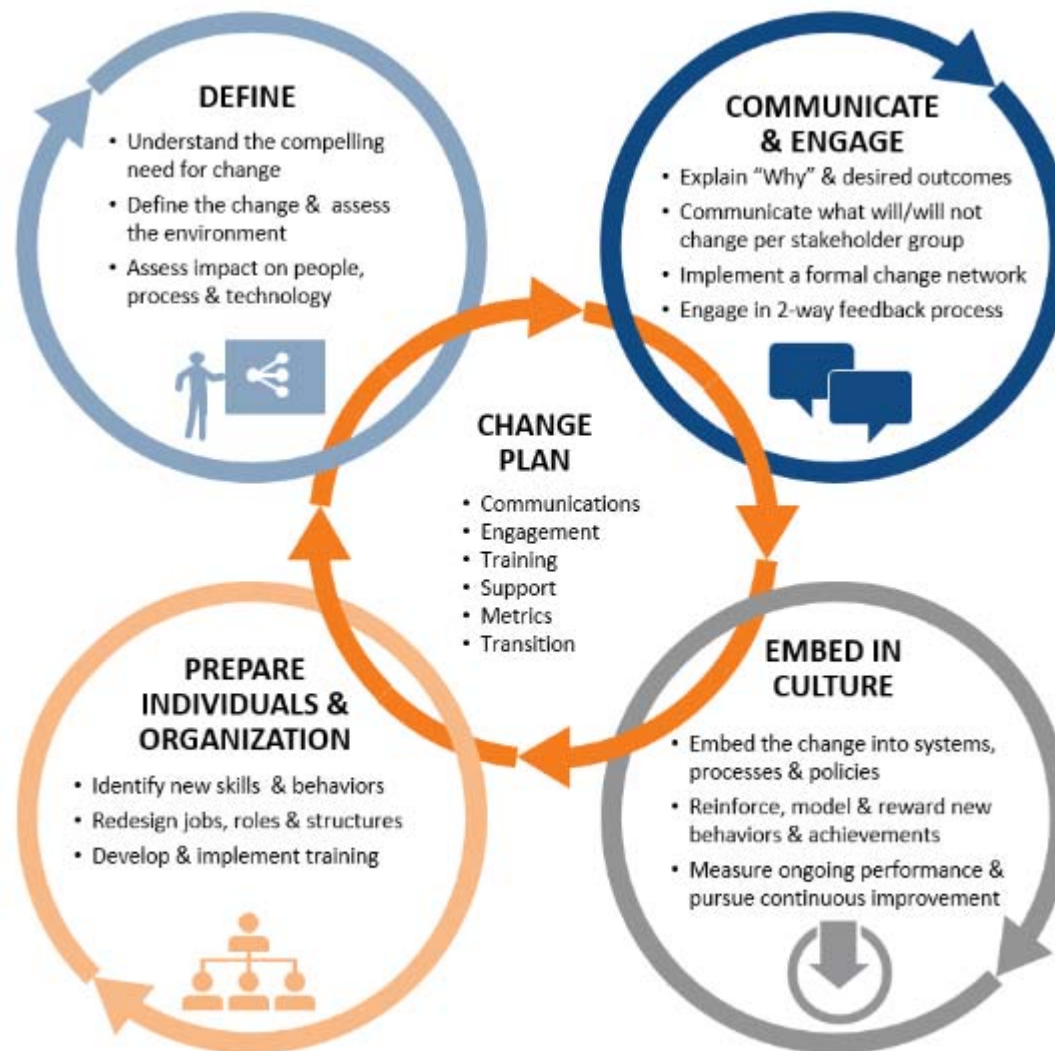


**PEOPLE**

# People-Centric Digital Transformation



# Successful Adoption Starts with Your People



# Managing People

- Human Resource Information System (HRIS)
  - Payroll
  - HR Module
  - Time & Attendance
  - Benefits Administration
  - Self Service
- Strategic Performance Management
  - Coaching framework
  - Alignment to the mission
  - Transparency
  - Regular performance conversations
  - Course correction
- For recommendations or implementation/configuration support contact [jpappenheimer@bpmcpa.com](mailto:jpappenheimer@bpmcpa.com) or 925-296-1058



**PROCESS**

# Business Process Optimization

- Sequentially transition through tasks with minimal human intervention
- Use technology to automate
- Accelerate how work gets done
- Achieve digital transformation
- Increase service quality

Multiple  
People  
Required to  
Execute

High  
Volume  
Tasks

Time-  
sensitive

Duplicate  
Data Entry

Significant  
Impact on  
other  
Processes  
& Systems

Need for  
Compliance  
and Audit  
Trails

# Business Process Optimization

How many of you are doing the follow tasks by hand?





## Processes to Start With



**Paying Bills | Virtual Bill Payment Solution**



**Renewing Memberships | Donor Management System**



**People Management | Human Resource Information System**



**Collecting Donations | Integration with General Ledger System**



**Back Office Processes | Document Management**



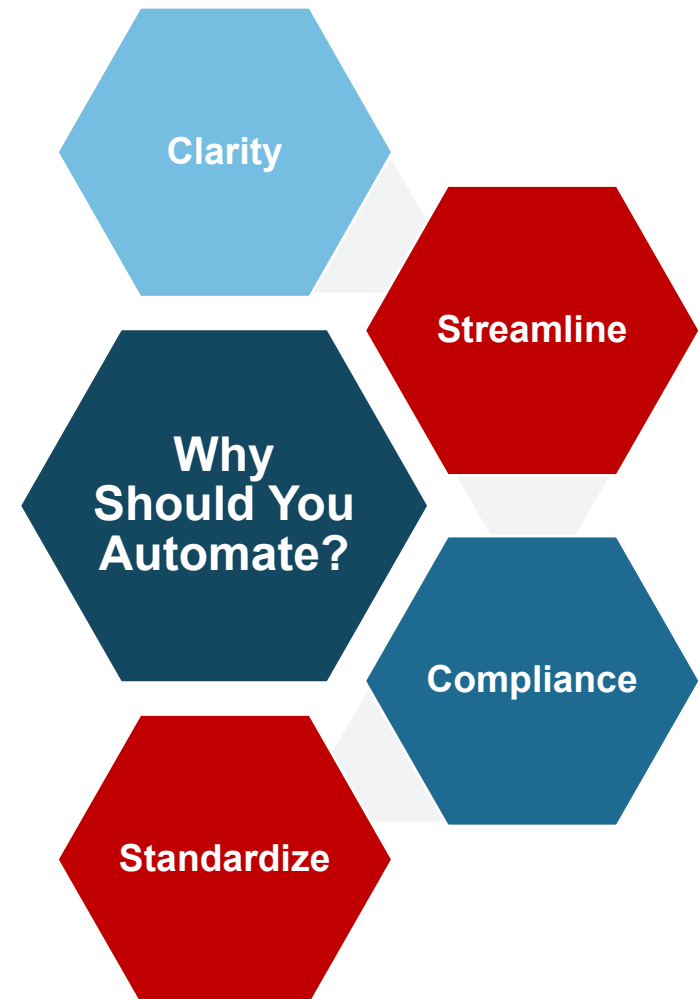
**Donor Engagement | Web-based Portals & Platforms**

**TECHNOLOGY**

# Automation

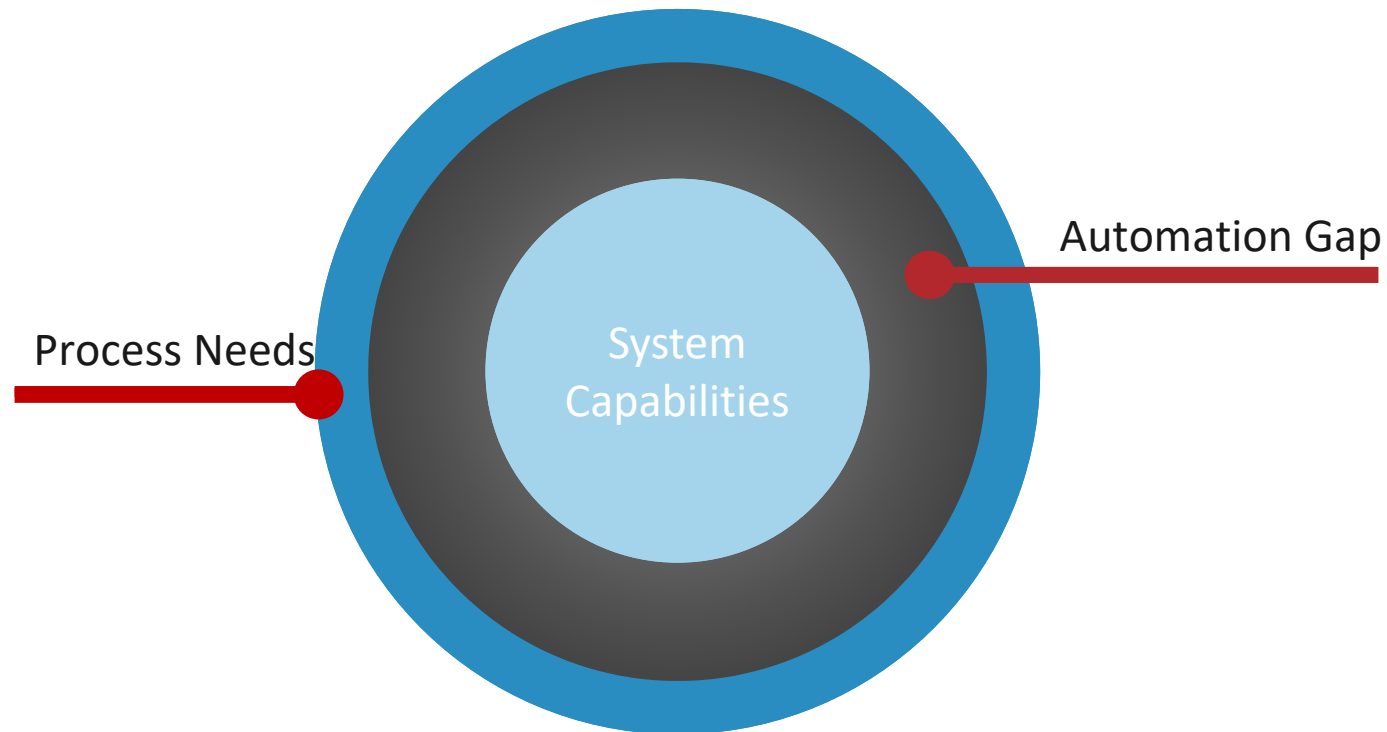
## Key Elements to Identify

- The process requires consistency across the organization
- The process is repeatable
- The process needs to be free from error, every time



*Automation has moved from being a luxury to a necessity*

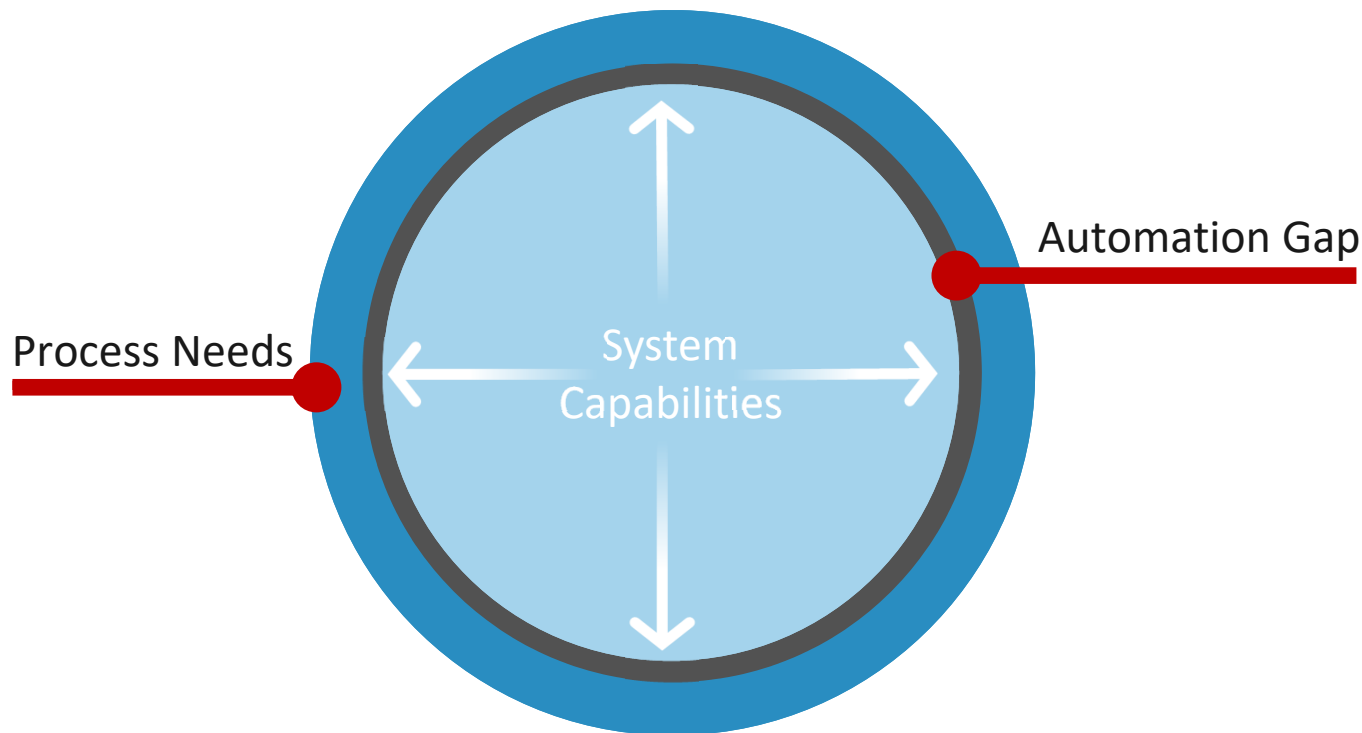
# Get Tech-Savvy About the Automation Gap



Process needs change faster than system capabilities

*A new system risks being a stop-gap measure*

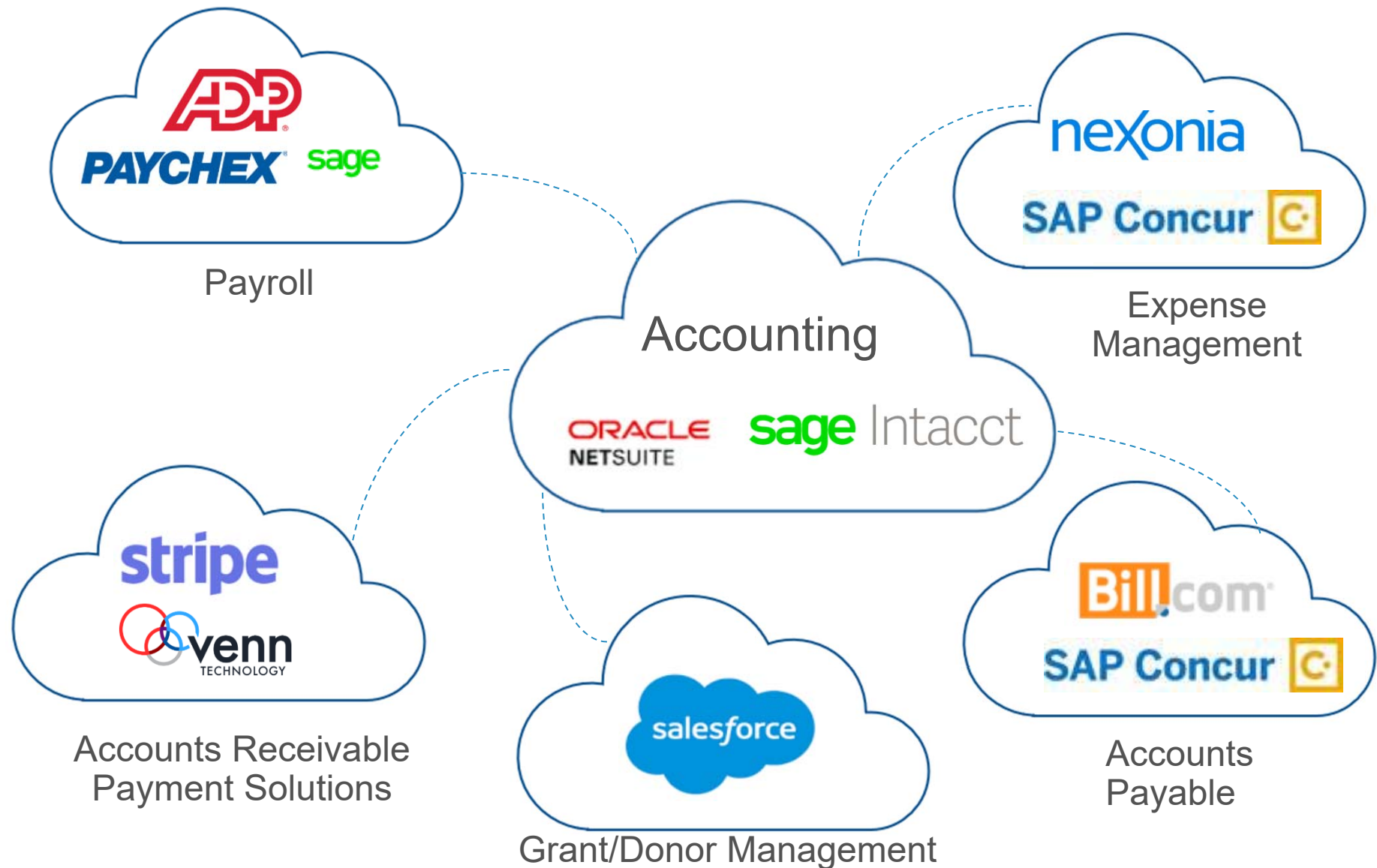
# Get Tech-Savvy About the Automation Gap



Set the stage for ongoing growth. Look for a system that:

- ✓ Provides new capabilities frequently
- ✓ Makes it easy to adopt these new capabilities

## Technology, Working For You, Not Against You



**NEED HELP?**

# How Can BPM Help?



## PEOPLE

- ✓ Coaching Framework
- ✓ Alignment to the Mission
- ✓ Regular Performance Conversations
- ✓ Human Resource Information Systems
- ✓ Course Corrections
- ✓ HR Technology Consulting
- ✓ Payroll

## PROCESS

- ✓ Digital Transformation Strategy Roadmap
- ✓ Workflow Modelling
- ✓ Host Workshops
- ✓ Share Best Practices
- ✓ Review Existing Practices
- ✓ Identify Gaps
- ✓ Make Recommendations
- ✓ Internal Controls Review

## TECHNOLOGY

- ✓ System Selection
- ✓ New System Set Up
- ✓ Continuous Training
- ✓ Optimization and Enhancements
- ✓ Custom Development and Scripting
- ✓ Automations
- ✓ System Integrations

BUSINESS TRANSFORMATION



Stay up-to-date with the BPM  
COVID-19 Resource Center at  
**[bpmmcpa.com/COVID-19](https://bpmmcpa.com/COVID-19)**

**Q&A**

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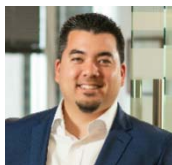
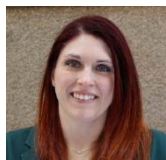
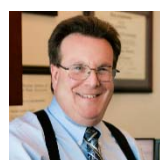
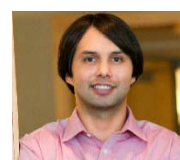
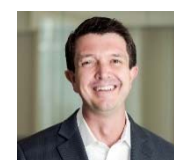
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# BPM's Nonprofit Partners, Directors and Managers

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For more information on BPM's Nonprofit services, visit [www.bpmcpa.com/nonprofits](http://www.bpmcpa.com/nonprofits)

**THANK YOU**