



# Gaining Board Approval

## Building a business case for community and event software

A strong business case for a technology change begins well before a software contract reaches the board. It starts with a clear understanding of your organization's goals and challenges. From there, you can assess how a solution would support those priorities - whether by improving member engagement, increasing efficiency, driving revenue or providing better data. With this in mind you can present the value clearly to the board.

# Creating a compelling case

**1**

List the challenges with your current situation

**2**

Outline the issues with the current solution

**3**

Define the functional requirements

**4**

Do the product research taking into account value for money, service ...

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The cases to be made: Strategic, Economic, Financial and Management

**6**

Recruit a few supporters

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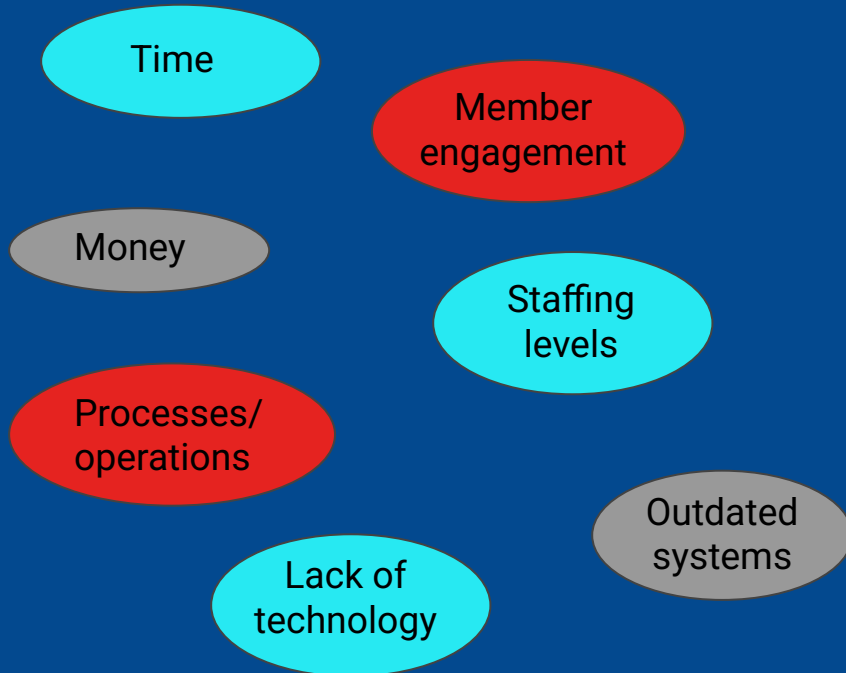
Prepare the pitch

**8**

Be prepared for questions

# List the challenges

Outline the ways that your current system, or not having a system, is holding you back. Identify the pain points.



## Member services –

- Are there areas where you aren't best serving your members.
- Create a list of things your members have asked for.
- Determine what effort it would take to fulfill them with the current system.

## Unnecessary time and effort –

- Talk with each department about where they spend most of their time. (multiple systems, manual data entry).
- Record these inefficiencies in a list. You'll end up with a long list of opportunities to streamline processes.

# Outline the issues with the current solution

- Members – Have any members threatened to leave if you don't fix certain issues or offer particular services?
- Cost – How much is it costing you to keep your current system in working order, beyond standard license or subscription costs.
- Technology – If your system relies heavily on a technology that is being discontinued, make the board aware of it.
- Time- Is your team tired of repetitive tasks and manual data entry on multiple systems?

# Define functional requirements

By listing the challenges and limitations of your current processes and identifying needs, create a list of desired and required features:

- Task – For each feature, assign which task it will help complete. Add details about how the task is currently being completed.
- Time to complete – Estimate the current time and effort to complete the task versus how long it will take with the new system.
- Benefit to members – List the benefits your membership will receive. By enhancing member engagement, technology can create and deliver lifetime member value.

If increasing efficiency is your most persuasive argument, start with those features. If your executive team is more concerned with member satisfaction, start there.

# Do the product research

Your executive team and board of directors need to know you've vetted multiple software vendors based on specific needs. Here's how to research software options in a way you can present to your management team:

- List your functional and technical needs based on the business challenges you've identified.
- Determine the extent to which the software fulfills the need.
- List the costs associated with each software vendor (including maintenance and upgrades).
- Present this information to your executive team and board of directors.

# The cases to be made

- Strategic case -
  - Will it further the aims and objectives of the organization?
  - Is there a clear case for change?
  - Business needs - current and future.
  - Main benefits and risks, constraints and dependencies.
- Economic case -
  - Is it value for money?
  - Have a range of options been considered?
  - Is it the best balance of cost, benefit and risk?
- Financial case:
  - Is it affordable?
  - Are the costs realistic and affordable?
  - Is the required funding available and supported?
- Management case:
  - Demonstrate that robust arrangements are in place for the delivery, monitoring and evaluation of the initiative.

# Recruit a few supporters

Before presenting to the board, it helps to have a few supporters in your corner. Share the idea with individual board members first. If more than one person is onboard, the wider board is more likely to support the proposal. Particularly when the recommendation comes from a peer they know and trust.

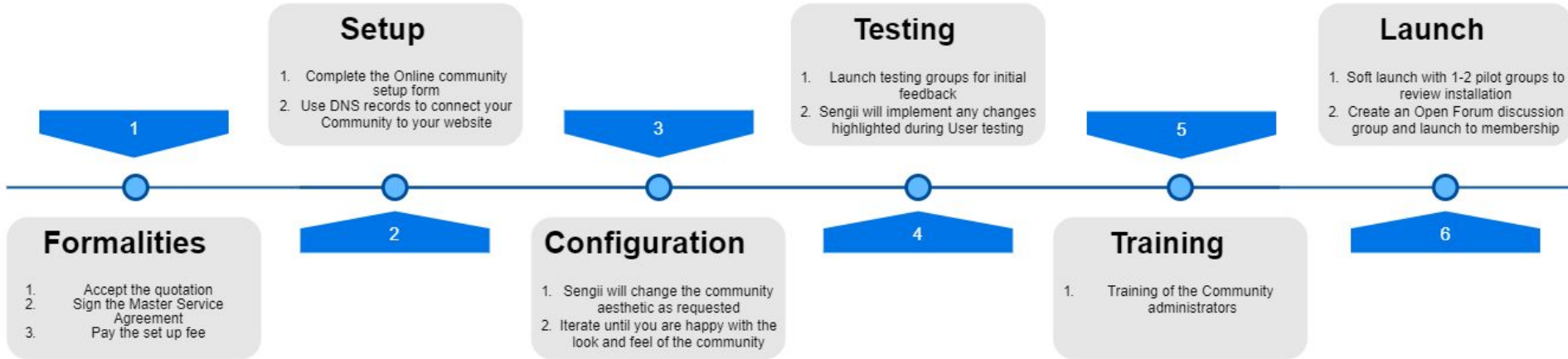


# Prepare the pitch

Make sure to include the following in your pitch:

- Outline the problem/ challenges or how current systems are holding the organization back
- Highlight the benefits and Return on Investment of the solution
- Clearly set out the costs, timeline, implementation phases, and required internal resources
- Set out the training and ongoing support provided by the technology partner
- Paint a picture of what the future will look like with the community/ event solution in place
- Invite them to sit in on a demo

# Onboarding Timeline



This isn't in  
the budget

# Be prepared for questions

This isn't  
the right  
time

Affordability is often where board scrutiny will focus.

- Keep the discussion centred on return and impact, not just price.
- Be clear on the operational gains: time saved, reduced manual processes, improved reporting, stronger member engagement and potential revenue growth.
- Quantify benefits wherever possible to strengthen credibility.
- Highlight the risks and limitations of maintaining the status quo.
- Position the investment in terms of long-term resilience, efficiency and member value.

Shift the conversation from “What does it cost?” to “What is the cost of not acting?”