



Digital Innovation and Cake

17 July 2024

About Adapta

The background features three stylized human figures. The top figure is purple, the bottom-left figure is teal, and the bottom-right figure is light blue. Each figure consists of a circular head and two large, rounded, leaf-like shapes for arms and legs.

- We are a **specialist** information systems consultancy
- We only work with **charities**, associations, arts and culture organisations and others in the not-for-profit sector
- We are completely **supplier-independent**
- Our consultants have held **senior** positions in a broad range of different organisations
- Our advice and guidance is based on **practical experience** gained over many years

About Adapta

Your Objectives and Plans



Strategy and roadmap



Reviews



Leadership and advice



Governance and structure

Your Organisational Capabilities



Technology solutions and partners




Risk and compliance




Workforce

Your Success



Implementation and change delivery



Technology adoption

Programme



- 14:00 **Arrival and welcome**
Welcome - introductions and overview of the agenda for the afternoon.
- 14:15 **Case study**

Using design thinking to innovate legacy fundraising
Louis Childs, Associate, Adapta Consulting and Jo Pullin, Innovation Lead, Macmillan Cancer Support

Followed by Q&A

Tea/Coffee and cake
- 15.15 **Digital innovation mini-workshop**
Mark Luckins, Principal Consultant, Adapta Consulting
- 16.15 Round table discussion and feedback
- 16.45 - **Review & close**
17.00 Adapta Consulting



Introductions



MACMILLAN CANCER SUPPORT

& Louis Childs

Innovating Legacy
Fundraising



Who are we?



Louis Childs, Independent
Innovation Consultant



Jo Pullin, Innovation Lead,
Macmillan Cancer Support

When I joined the charity sector 10
years ago innovation was....

When I joined the sector 10 years ago
innovation for charities was JUST....



A new Direct Marketing Pack

When I joined the sector 10 years ago innovation for charities was JUST....



A new Direct Marketing Pack



A new Regular Giving Product

When I joined the sector 10 years ago innovation for charities was JUST....



A new Direct Marketing Pack



A new Regular Giving Product



A new Mass Participation Event

Which was working ok but the world
outside of charities was changing fast

....



High expectations for supporter experience online

Which was working ok but the world outside of charities was changing fast

....



High expectations for supporter experience online



Increase in complexity of 'managing digital'

Which was working ok but the world outside of charities was changing fast

....



High expectations for supporter experience online

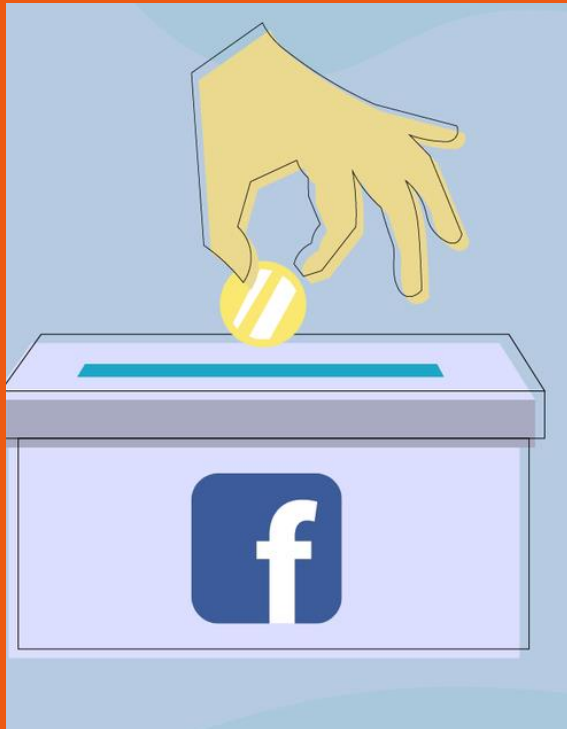


Increase in complexity of 'managing digital'

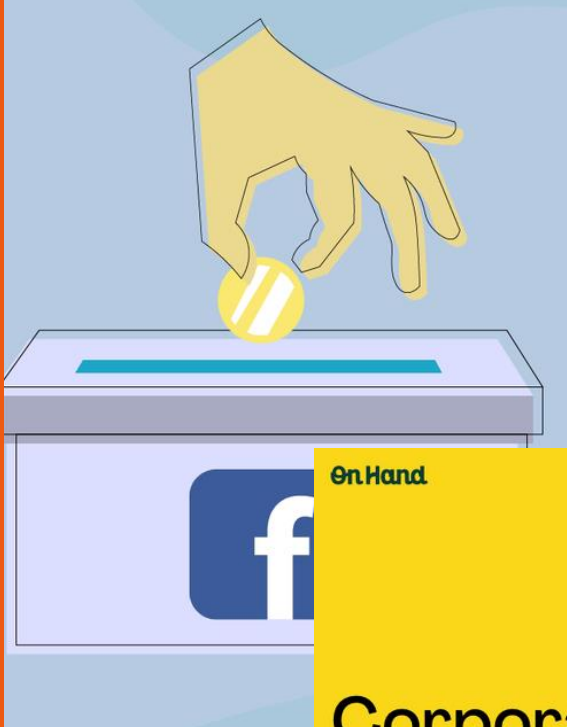


Need to develop digital products

Digital innovation has been happening
FOR the sector



Digital innovation has been happening FOR the sector



OnHand [Product](#) [Resources](#) [Sign in](#) [Make a Referral](#) [Request a demo](#)

Corporate volunteering that employees love.

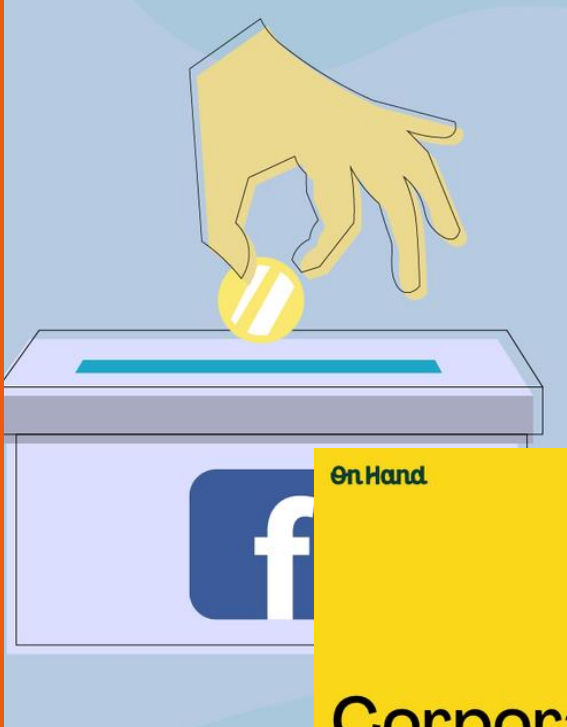
Your all-in-one tool for corporate volunteering & sustainability action.

LITTER PICKED. WHAT NEXT?
Francis H. Day-Colling Limited

DONATION
GIVE BLOOD. ALL THE LOVE.
Lisa B. MAPP Limited

A screenshot of the OnHand website. The background is bright yellow. At the top, there is a navigation bar with the OnHand logo and links for Product, Resources, Sign in, Make a Referral, and Request a demo. Below the navigation bar, there are two promotional cards. The first card is white with black text and a photo of people litter picking. The second card is dark green with white text and a photo of a woman donating blood.

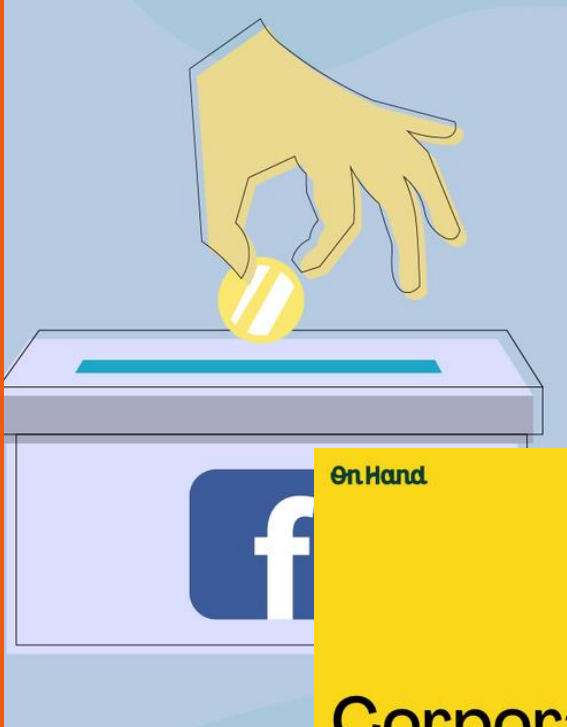
Digital innovation has been happening FOR the sector



A screenshot of the MATCHABLE website. The header includes navigation links: 'For Companies', 'Find Volunteers', 'Case Studies', 'About Us', 'Log In', and a 'BOOK A DEMO' button. The main headline reads 'Employee volunteering, to get excited about.' Below this is the text 'The #1 tool making corporate volunteering easy, engaging, and impactful.' and another 'BOOK A DEMO' button. On the right, there is a photo of a smiling woman and a list of volunteer opportunities: 'Help out at a homeless shelter', 'Mentor a disadvantaged youth', 'Fight deforestation using blockchain', and 'Proof read CVs for ex-offenders'. A mouse cursor is pointing at the second option.

An advertisement for OnHand. The background is yellow. At the top left is the 'OnHand' logo. At the top right are navigation links: 'Product', 'Resources', 'Sign in', 'Make a Referral', and 'Request a demo'. The main text reads 'Corporate volunteering that employees love.' Below this is the subtext 'Your all-in-one tool for corporate volunteering & sustainability action.' There are two promotional cards: one for 'LITTER PICKED. WHAT NEXT?' featuring a group of people and the text 'Francis H. Dish-Cleaning Limited', and another for 'GIVE BLOOD. ALL THE LOVE.' featuring a woman in a red dress in a blood donation chair and the text 'Lisa B. MAPP Limited'.

Digital innovation has been happening FOR the sector

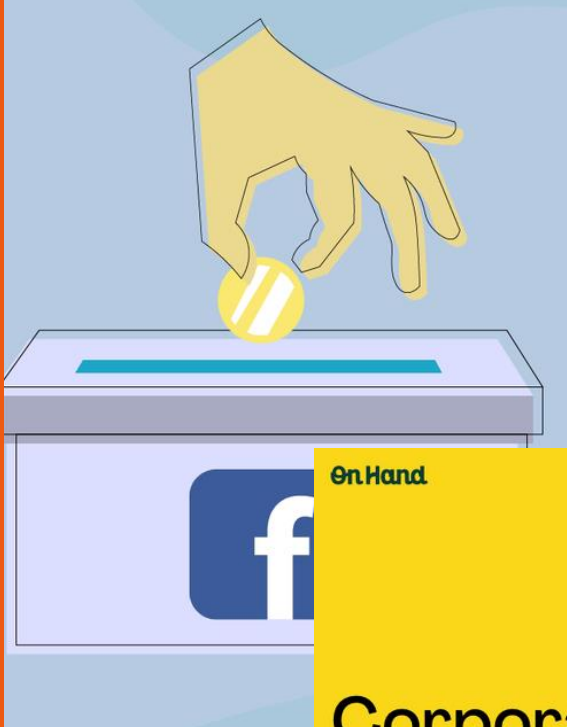


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A screenshot of the Toucan website. The header includes 'Toucan' and navigation links for 'Product', 'Resources', 'Sign in', 'Make a Referral', and 'Request a demo'. The main headline reads 'Show the world what you stand for.' Below it, a sub-headline says 'Thousands of charities. Regular, flexible donations. One simple app.' A paragraph of text follows: 'PayaCharity, the UK's largest provider of contactless donation devices, has acquired Toucan as it seeks to strengthen its offering in the Charitable giving sector.' At the bottom, there are buttons for 'Download on the App Store' and 'GET IT ON Google Play'. On the right, there is a smartphone displaying the Toucan app interface, which shows a 'Welcome back, Connie' message, a list of charities like 'Surrey UK' and 'PFI Factory Music', and a 'Mental Health Awareness' section.

Digital innovation has been happening FOR the sector



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By the end of this presentation,
you'll know....

How to utilise internet-era methodologies
like agile, design thinking to make
innovation happen

About me....

Clients



Experience



The objective

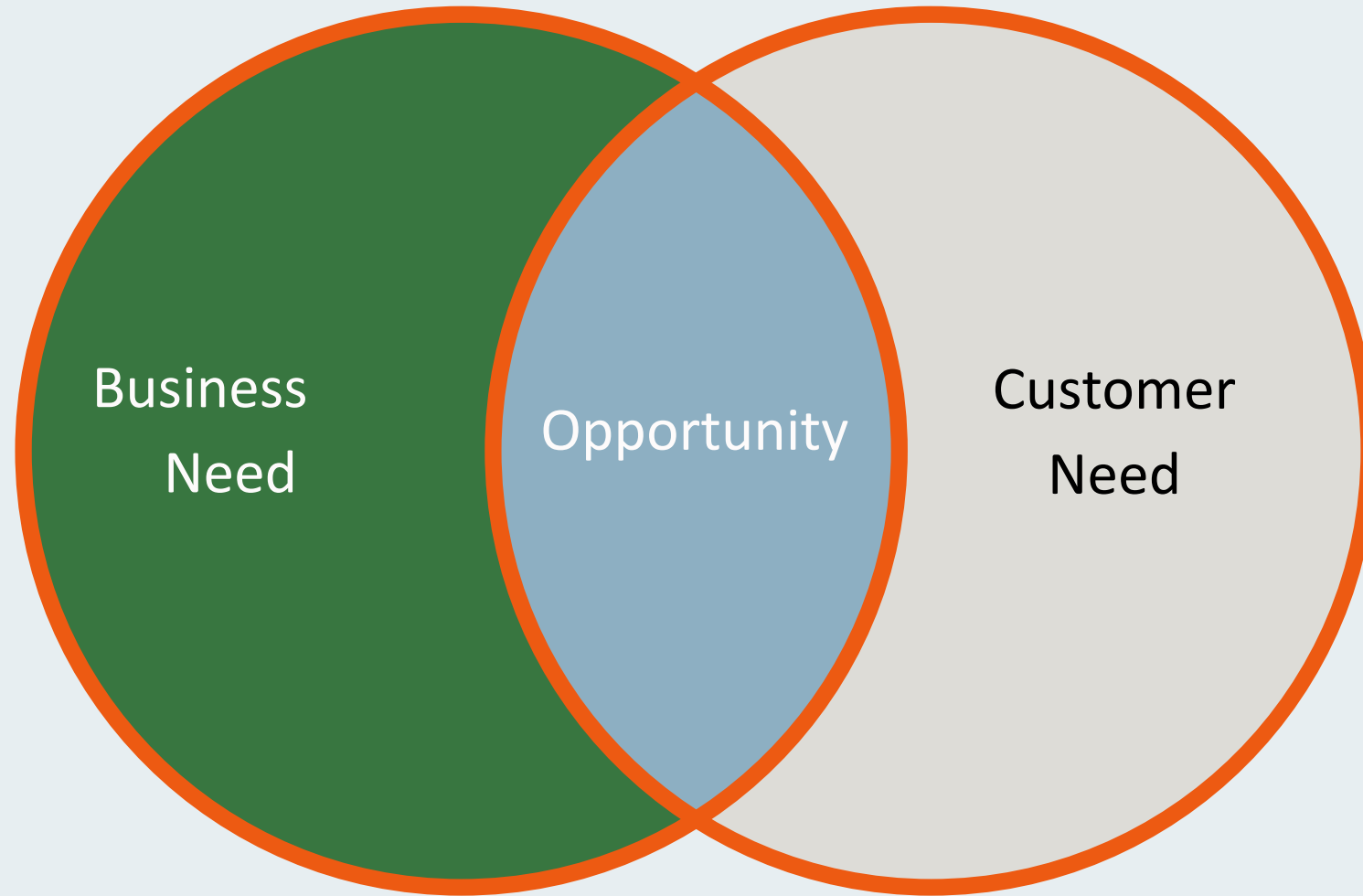
Create a robust pipeline of new opportunities for legacy fundraising at Macmillan Cancer Support

Legacies at Macmillan



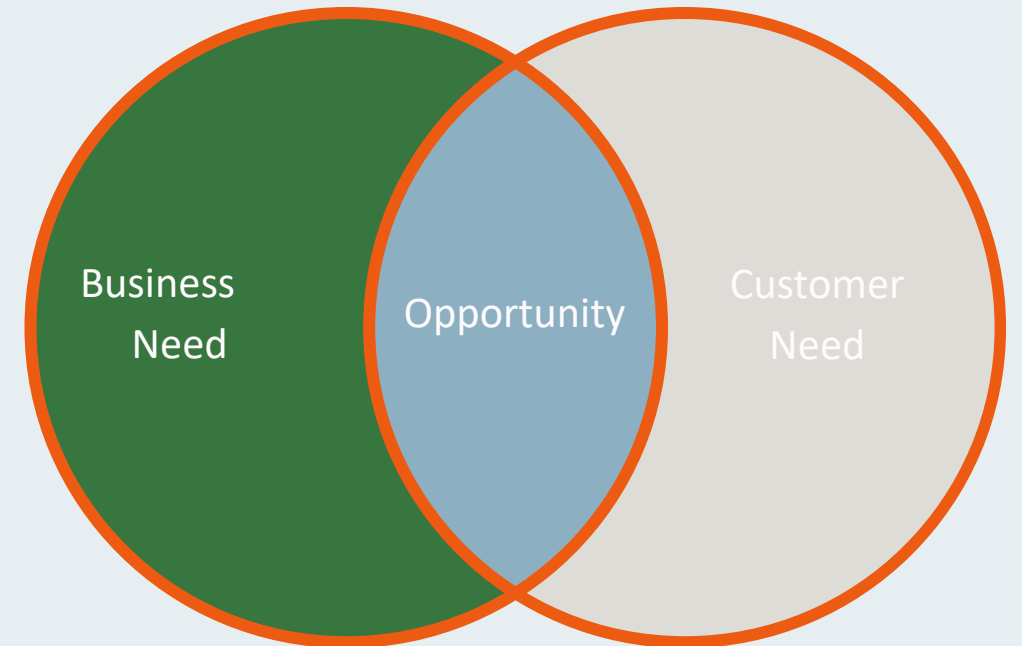
- We needed to provide direction for your legacy innovation programme
- We need to consolidate the vast knowledge alongside new learnings from talking to the target audience
- We needed to uncover tangible opportunities for legacy fundraising
- We needed to find out what the key challenges are for the target audience
- We had a lot of quantitative data about legacies but lack qualitative research

How can we innovate legacy fundraising?



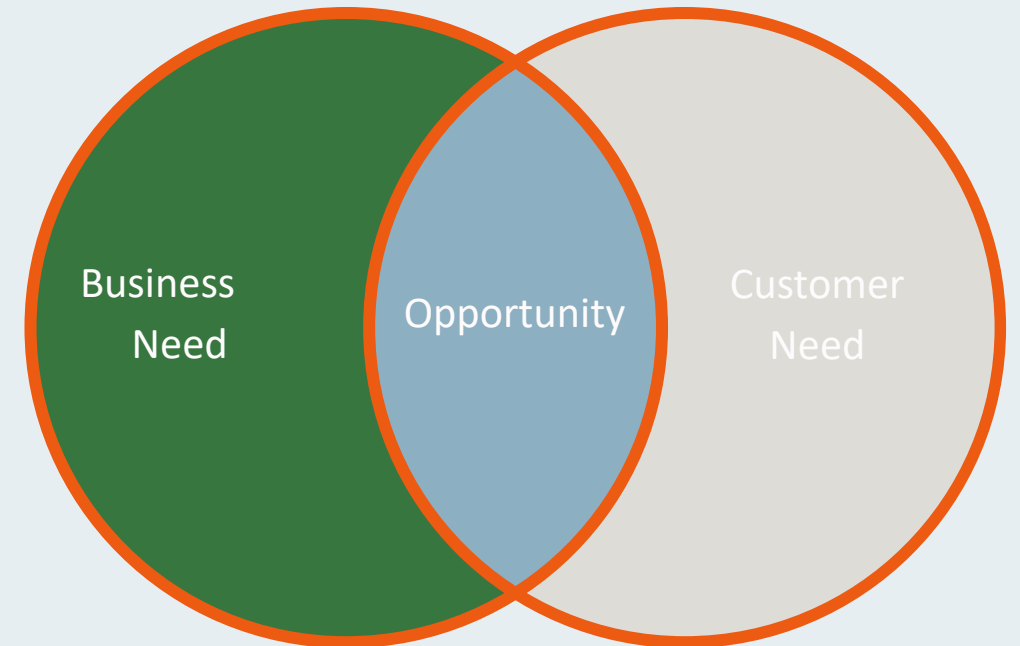
How can we innovate legacy fundraising?

- Legacies present a huge opportunity for charities



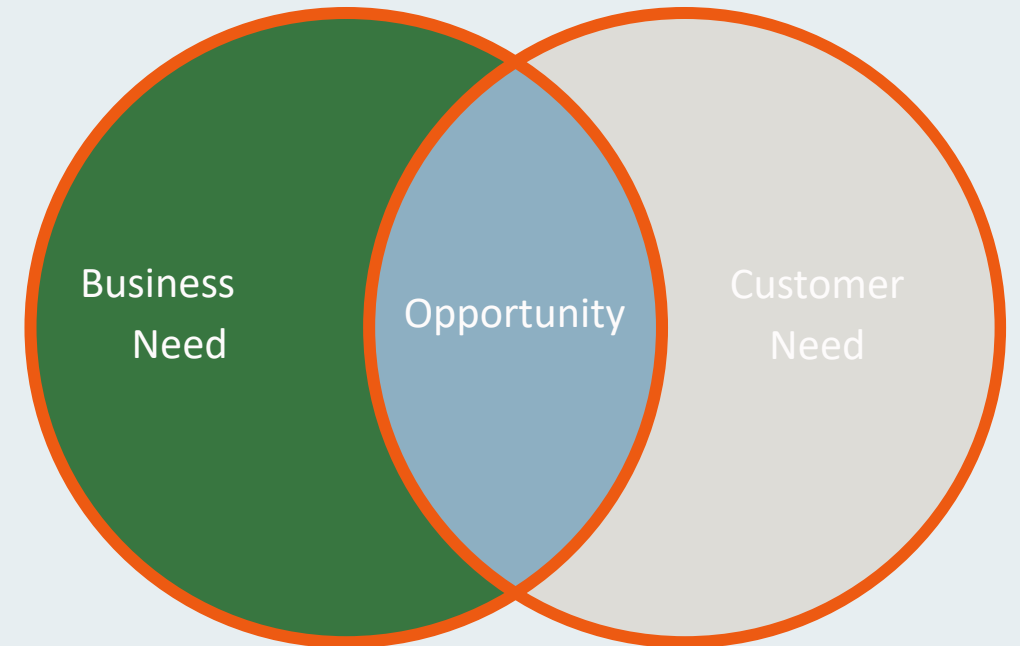
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- Legacies present a huge opportunity for charities
- A lot of data about gifts in wills



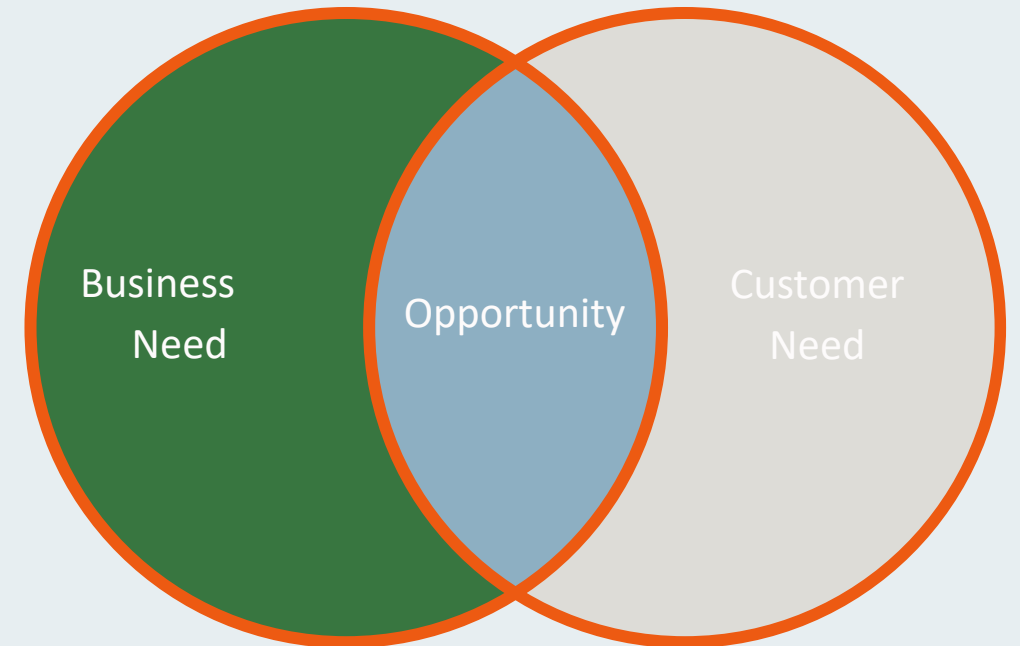
How can we innovate legacy fundraising?

- Legacies present a huge opportunity for charities
- A lot of data about gifts in wills
- Focus on opportunities NOT ideas



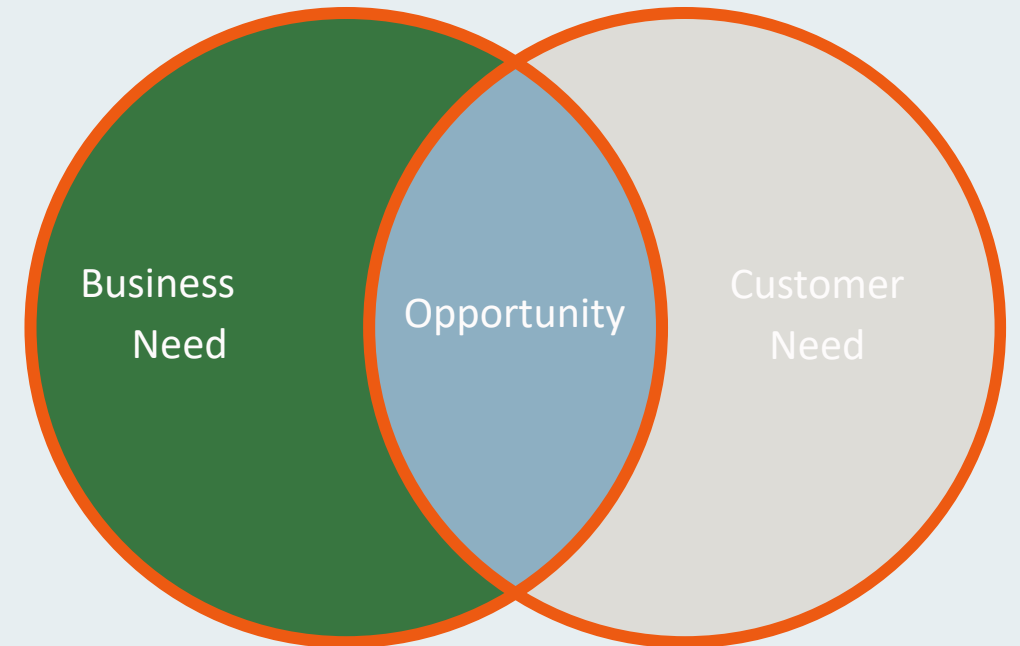
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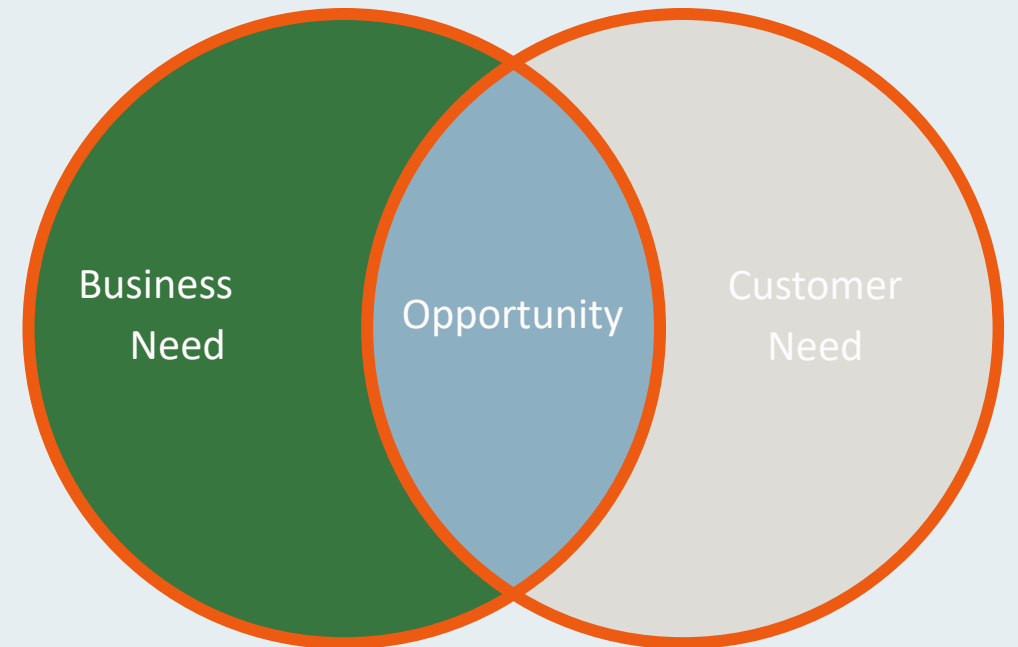
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- Ideas on the other hand, focus on business needs which don't address customer needs.

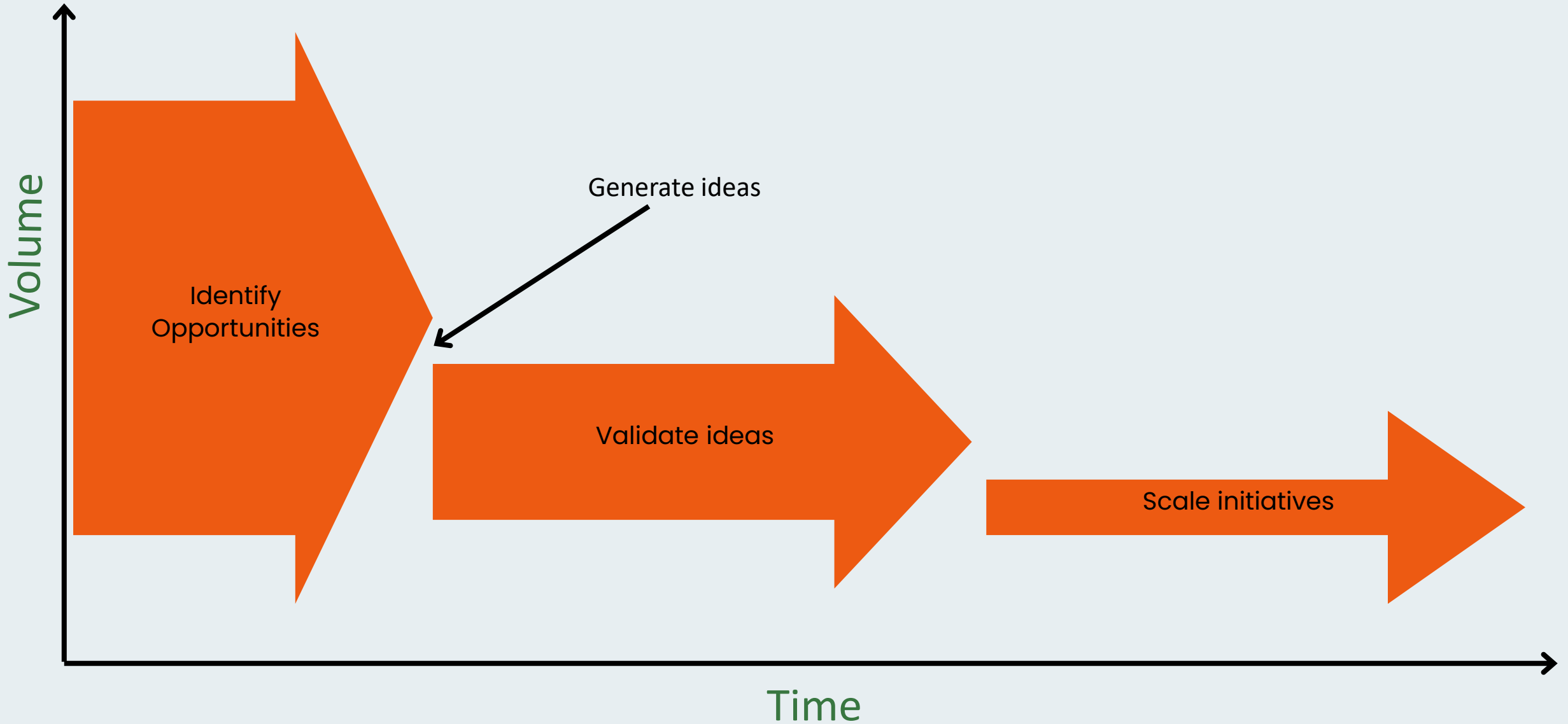


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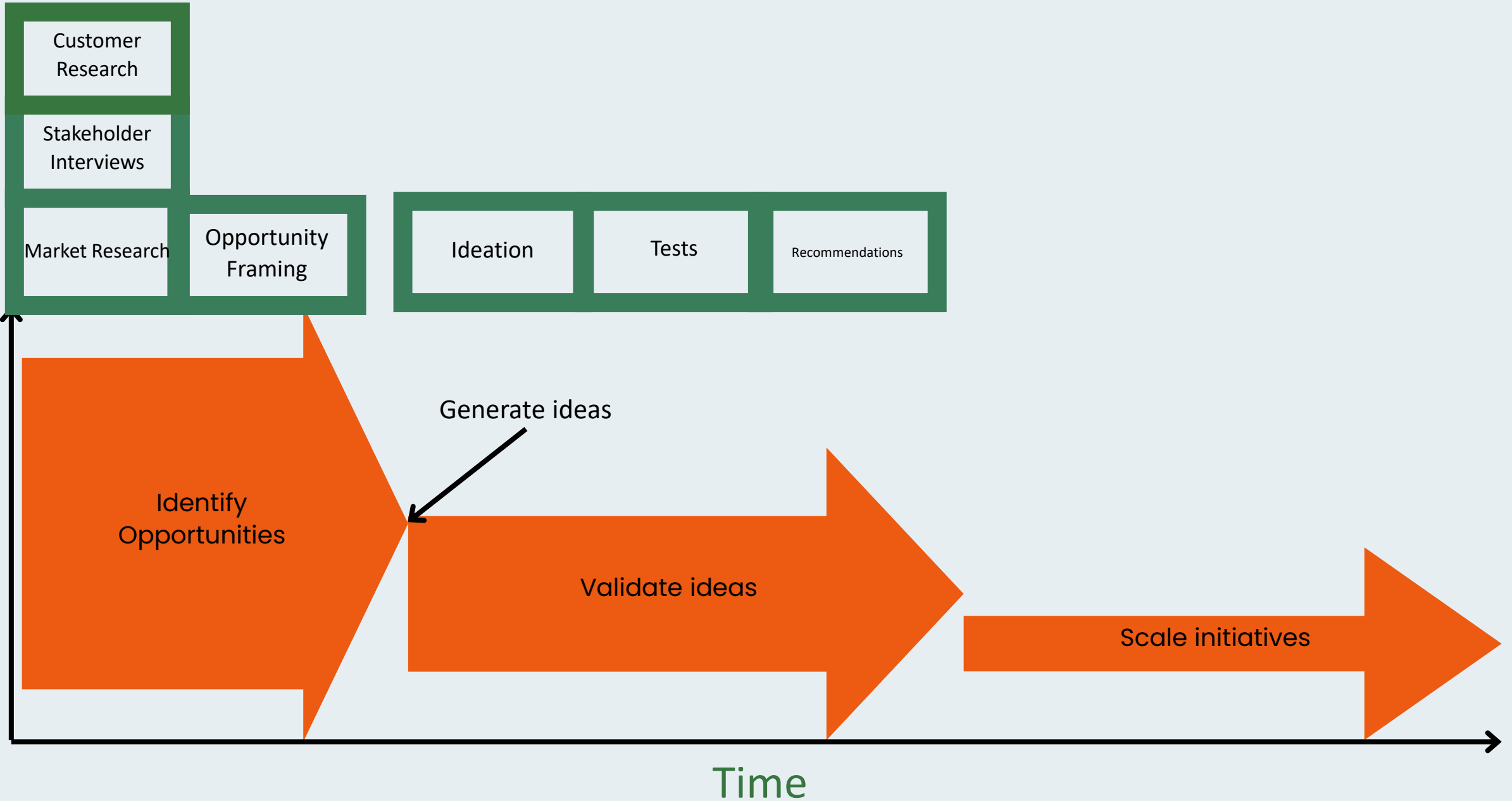
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- Opportunities are valuable and meet both a customer and business needs.
- Ideas on the other hand, focus on business needs which don't address customer needs.
- Often teams focus on their own needs and try to nudge customers in that direction. In our experience, this rarely works.



The process



The process



Design Thinking



Empathize



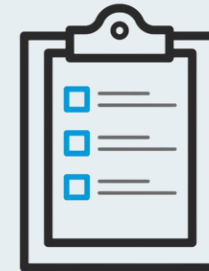
Define



Ideate



Prototype



Test

The Harness Innovation process



Empathize



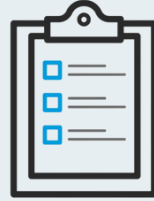
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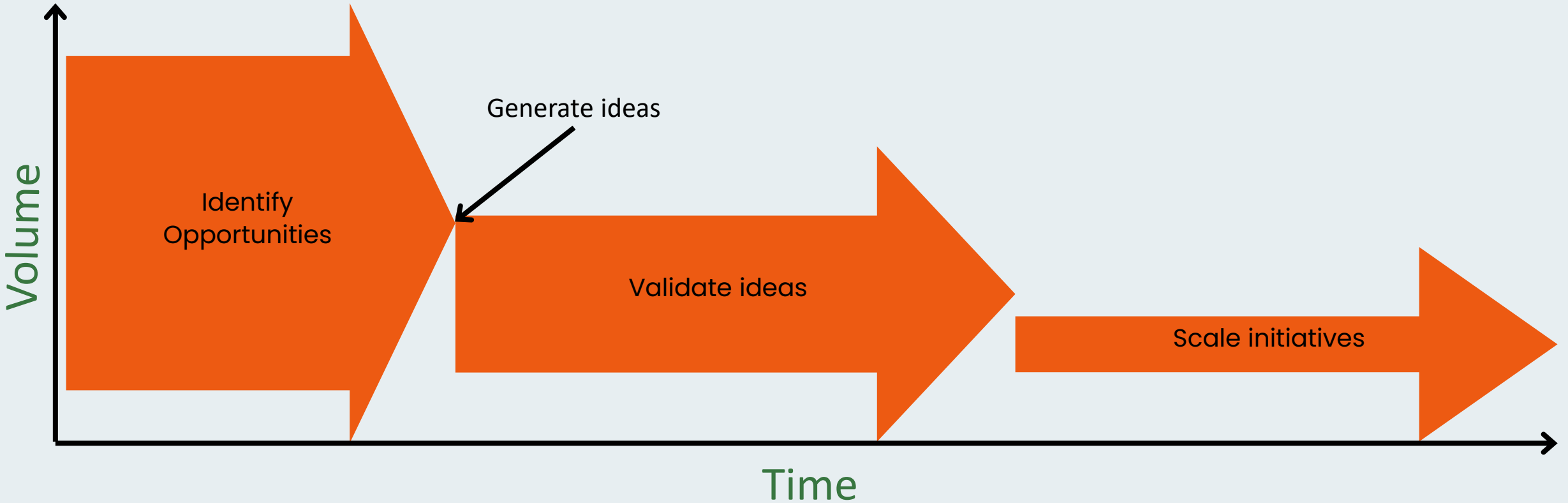
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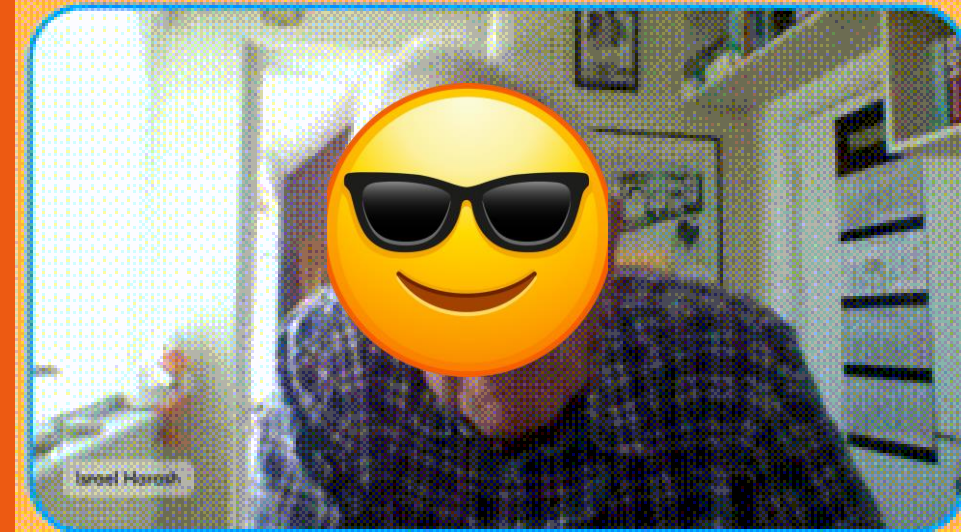
Test



AUDIENCE INSIGHT

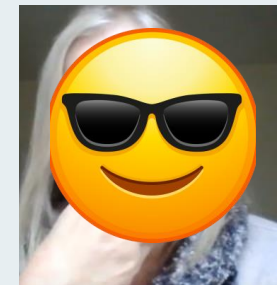
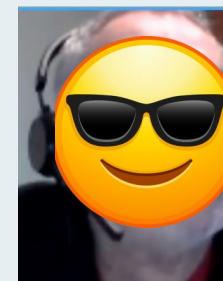
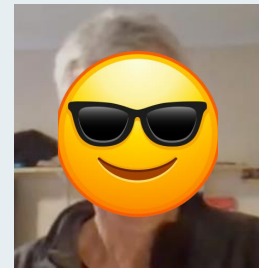
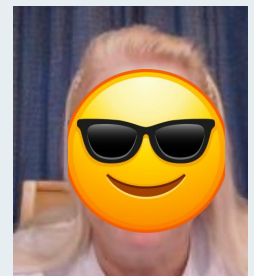
How it works:

- We curated a panel of 12 individuals mirroring your target audience
- Conduct in-depth interviews to increase understanding of their lives, motivations and challenges they face
- Extracted key insights & opportunity springboards
- Delivering an insight deck to inform opportunity definition for your legacy innovation programme

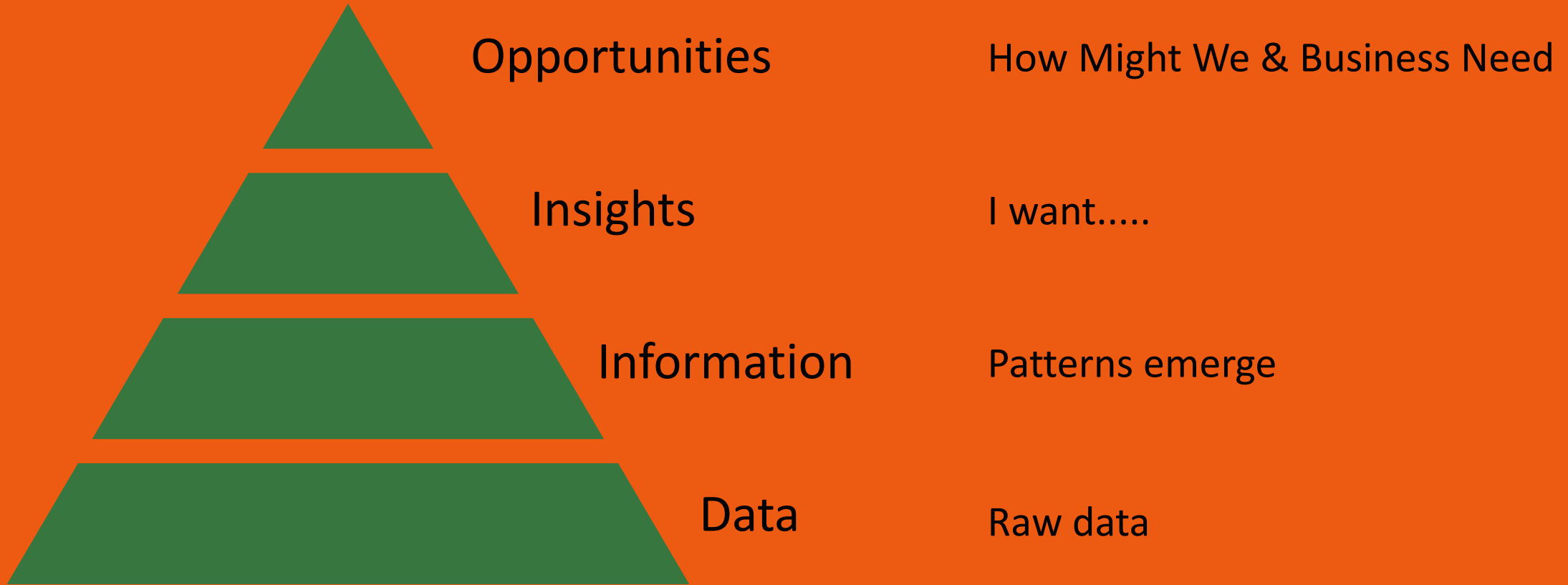


Who we listened to

- People who have a gift in their will or open to leaving a gift in their will
- Age range from 55-75
- Willing to talk honestly and openly
- Social grade C1 and above
- England & Scotland with skew to London & South
- 50:50 Male-Female Ratio



From data to action



Opportunity Framing Workshop



What went so badly wrong?

- Built on blind faith
- Didn't empathise with custo



- Share customer needs

Opportunity Framing Workshop



- Share customer needs
- Gather business needs

Opportunity Framing Workshop



What went so badly wrong?

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- Share customer needs
- Gather business needs
- Combine with customer needs

Opportunity Framing Workshop



What went so badly wrong?

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- Frame as a challenge question

Opportunity Framing Workshop



What went so badly wrong?

- Built on blind faith
- Didn't empathise with custo



- Share customer needs
- Gather business needs
- Combine with customer needs
- Frame as a challenge question
- Ideation session to solve challenge

Opportunity Framing Workshop

How did it help us make progress?

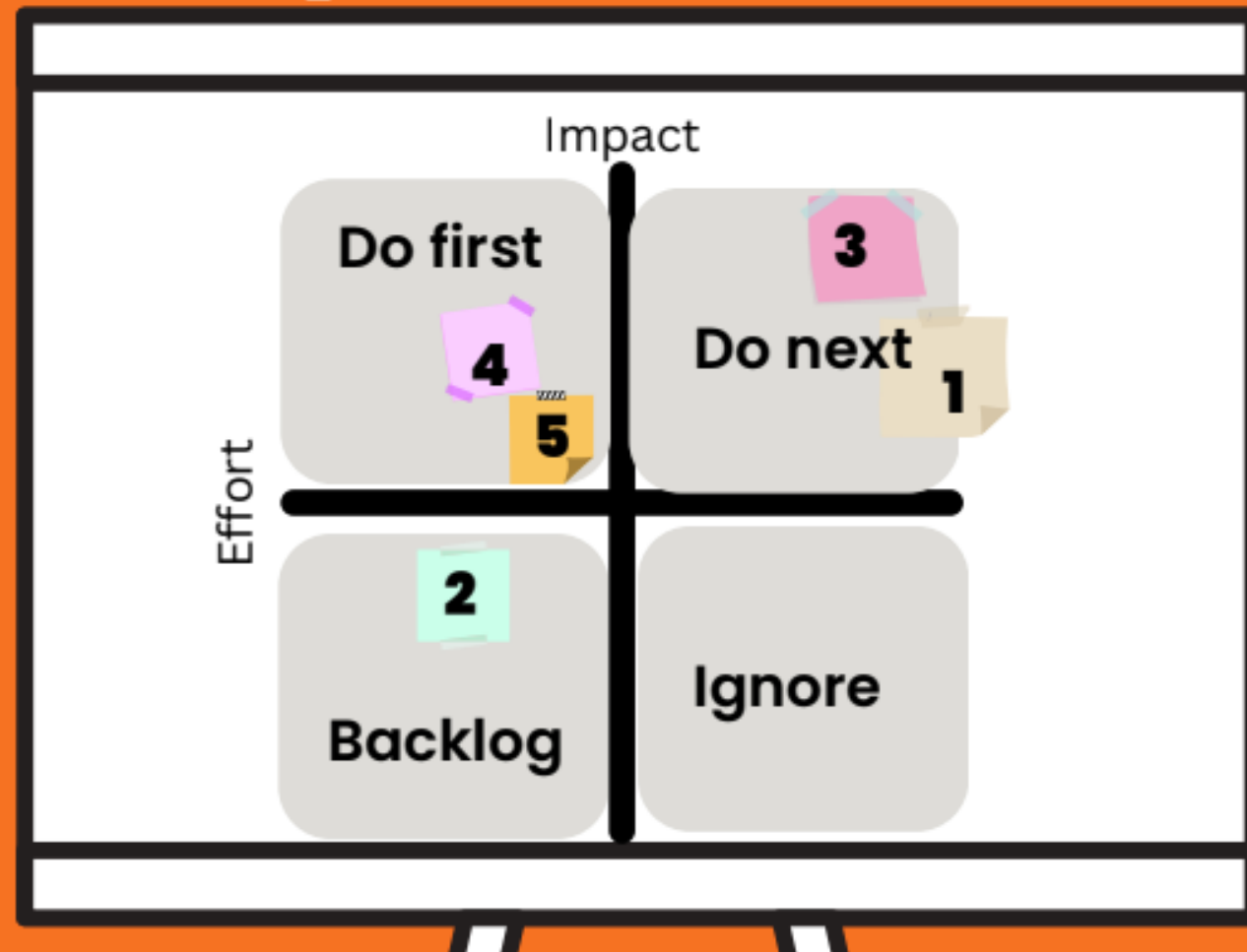
“Thanks for being a great facilitator – we can have a lot of (sometimes conflicting) opinions and it’s thanks to you that we didn’t get stuck into multiple debates and not move ourselves forward!”

Kathryn Cheshire, Head of Legacy Promotions at Macmillan

Opportunity Framing Workshop

Output

Impact vs Effort



Opportunity Framing Workshop

Output

Do now	Do next	Do later
5	3	1
4	2	

Ideation

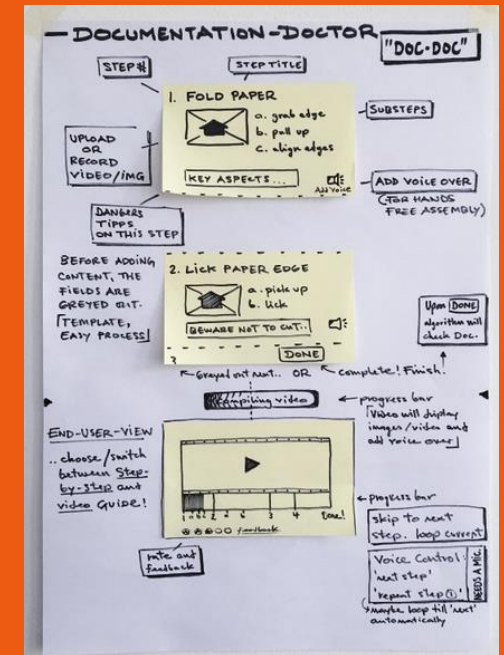
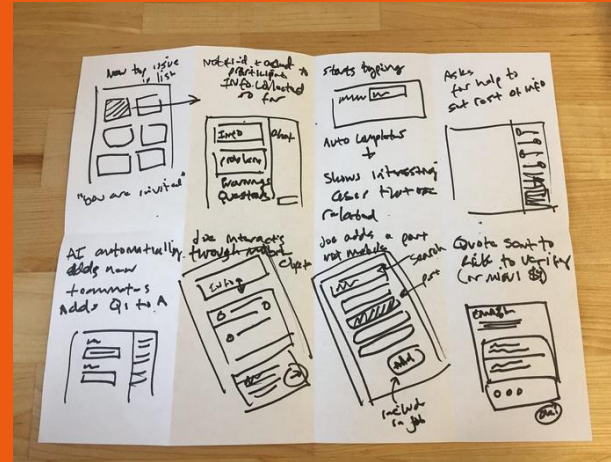
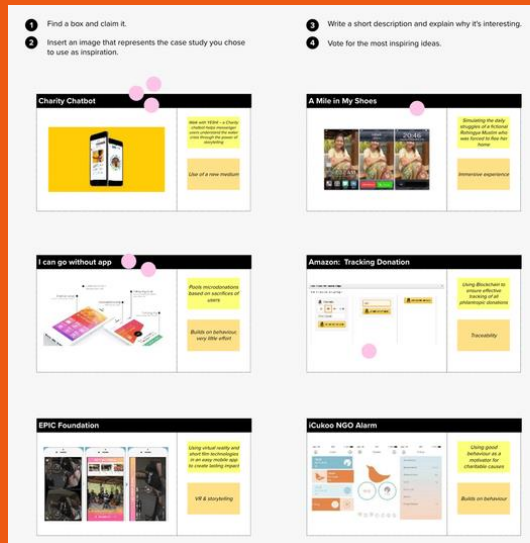
Ideation workshop from Design Sprint

1) Lightning Demos
(30 minutes)

2) Ideas
(15 minutes)

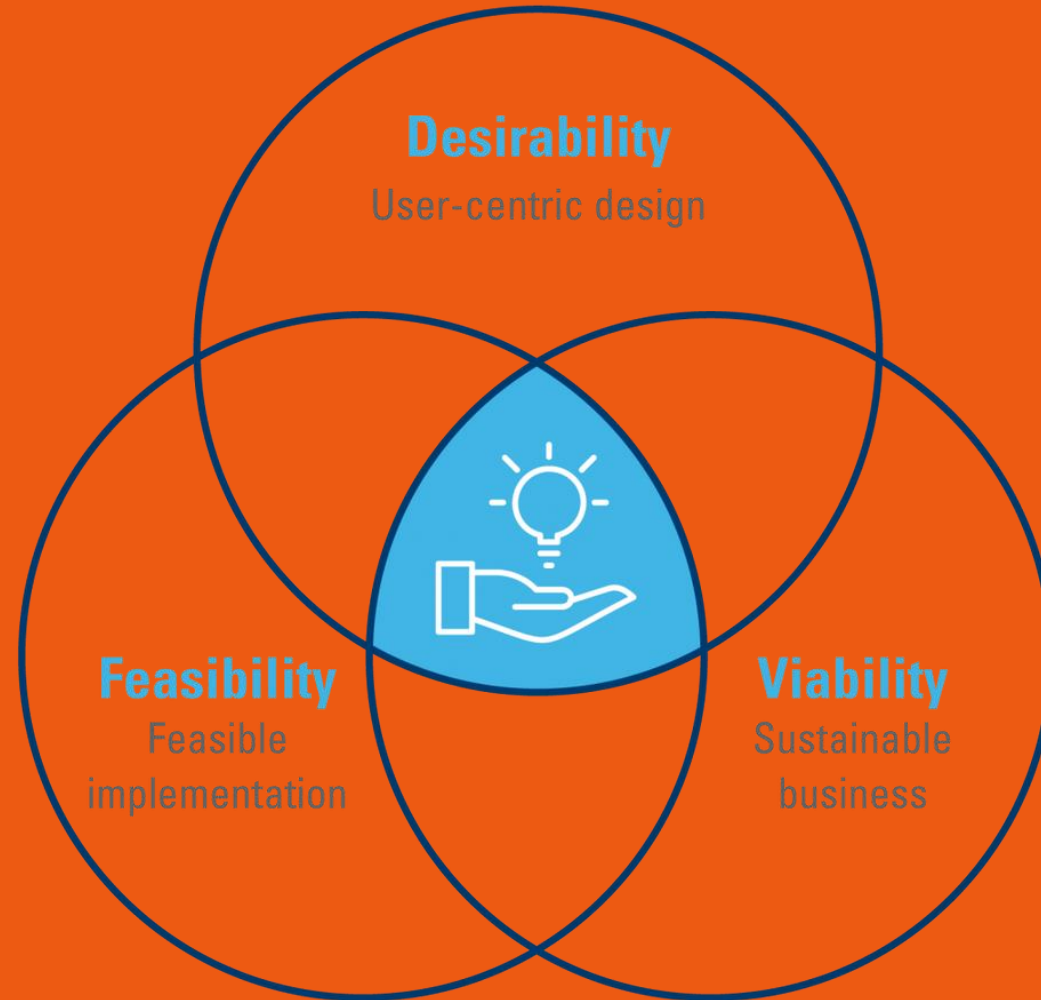
3) Crazy 8s
(8 minutes)

3) Solution Sketch
(30 minutes)

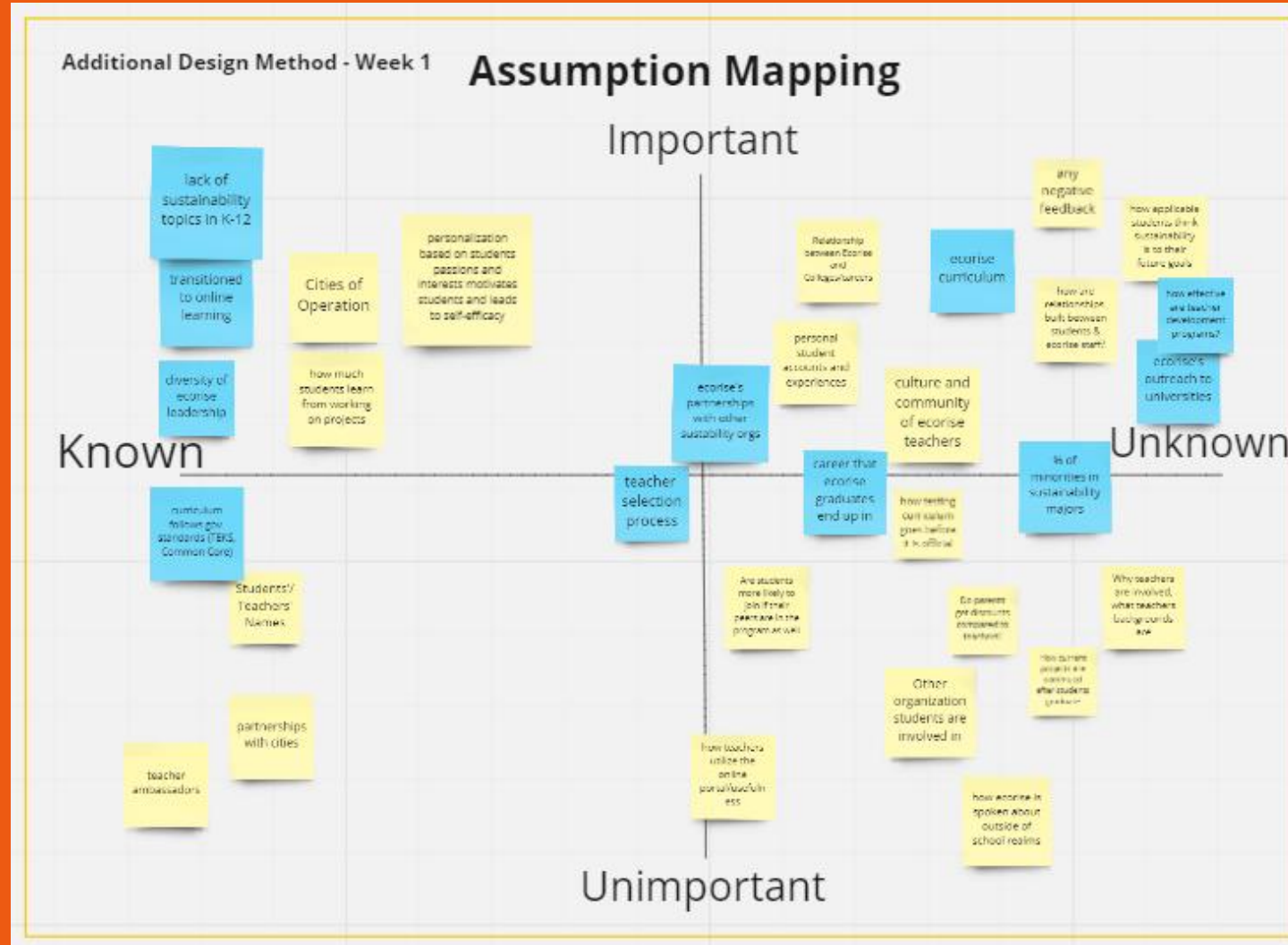


Prototyping & Testing

Score ideas on three criteria

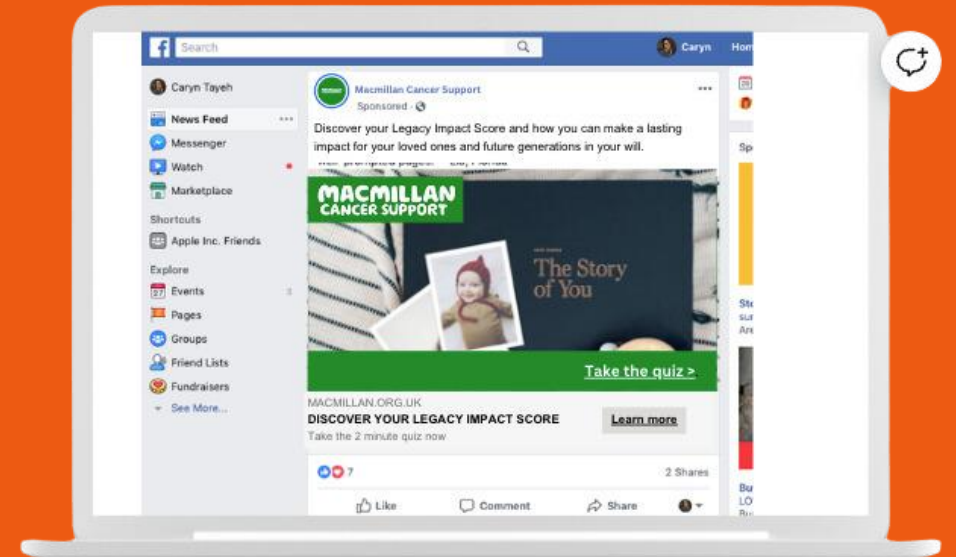


Assumptions Mapping

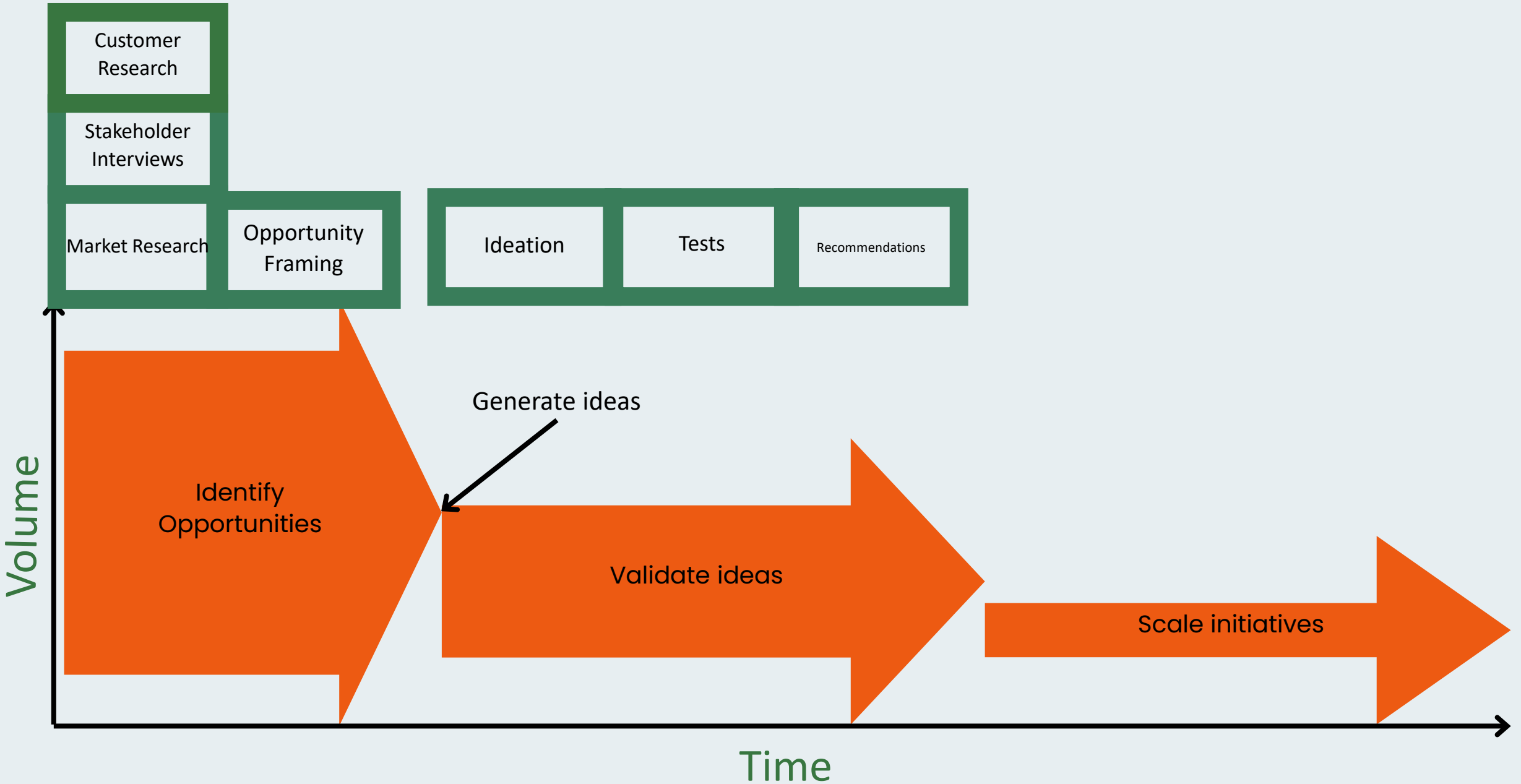


Prototyping and testing ideas

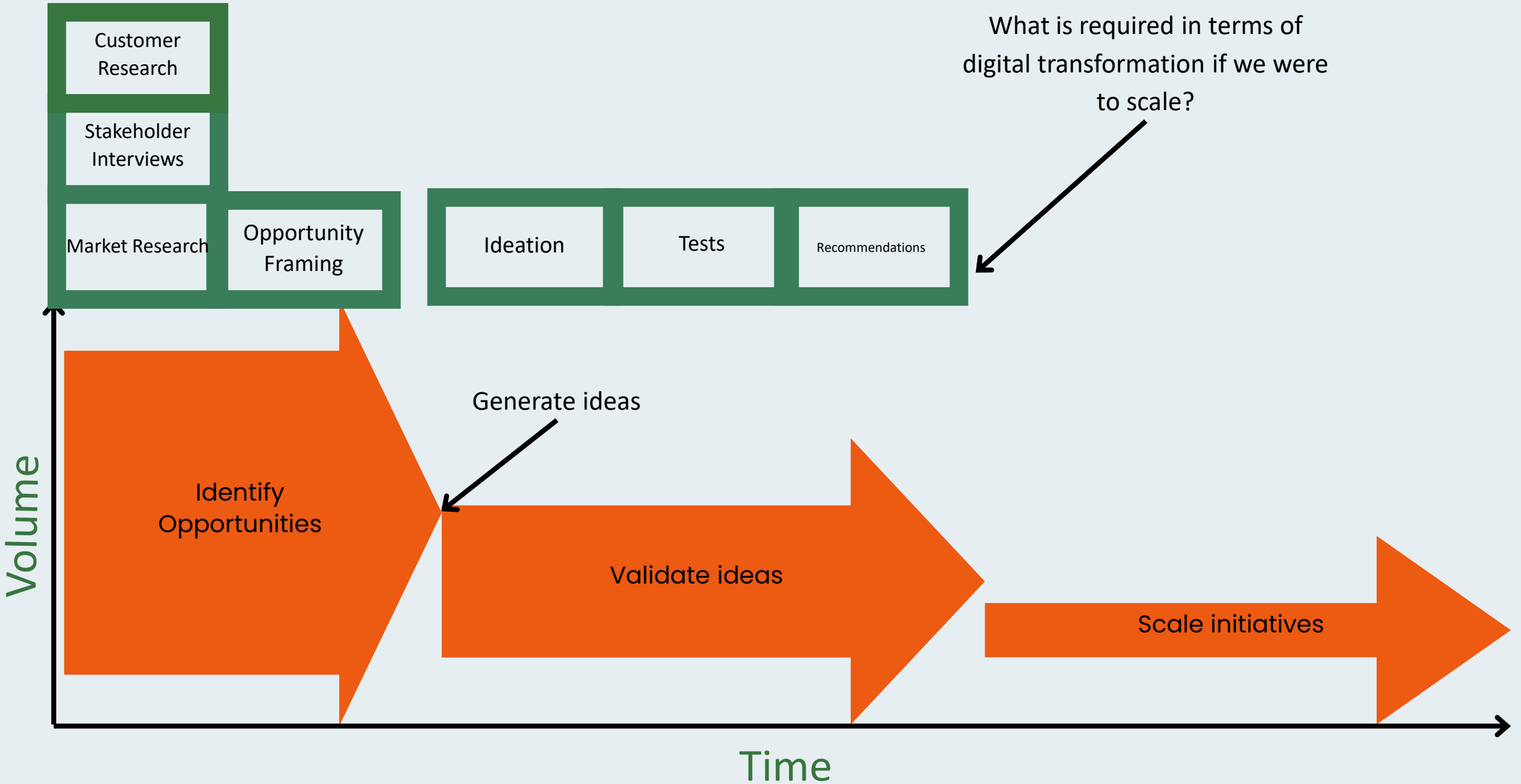
- Test biggest assumptions from workshop
- Creating mid-fidelity, clickable prototype
- Test with target audience to answer the most critical questions
- Refine, iterate and drastically improve the idea



The Harness Innovation process



The Harness Innovation process



Key takeaways

- Encourage customer-centric approach

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- Bring people with you on the journey

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- Encourage customer-centric approach
- Bring people with you on the journey
- External support as a trusted advisor and neutral facilitator can be very effective
- Don't be afraid to iterate and refine ideas based on user feedback
- Balance Desirability (do customers want it?) with viability (will it make money or should we do this?) with feasibility (can we do it?)

Thank you!

We'd love to answer any
questions!

Tea/Coffee break

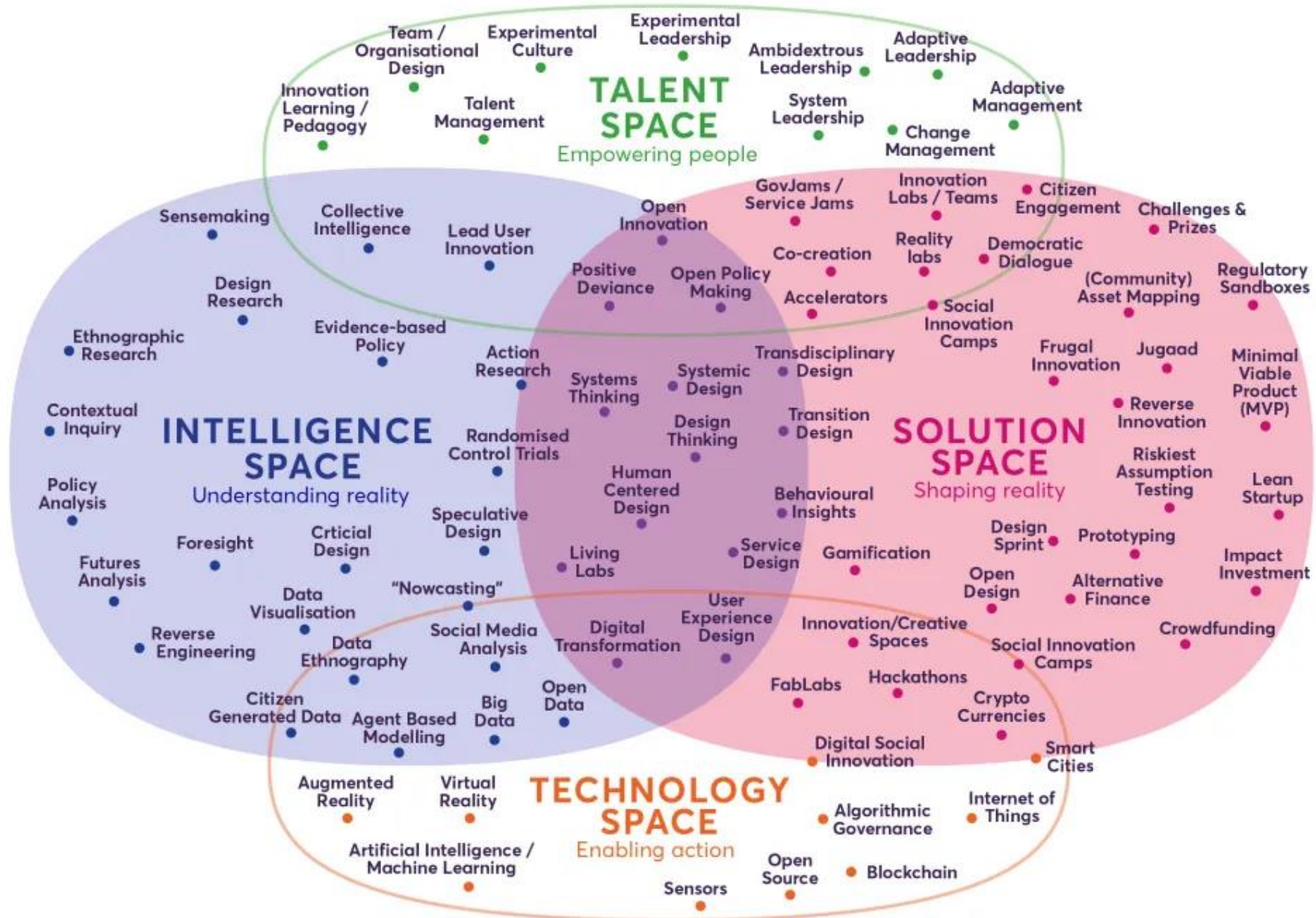


Innovation as a Capability

July 17th

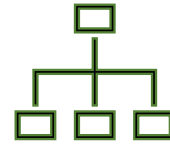


Landscape of Innovation Approaches



Talent Capabilities

Internal



External

Intelligence Capabilities

To supply data
and insight



To determine value
& align with
business plans

Solution Capabilities

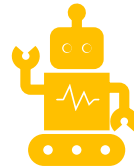
To build, test
& analyse



To market
and engage
audience

Technology Capabilities

Change existing
solutions



Assess and
select new
solutions

What about work culture?

What kind of culture is needed to support innovation?

Being Safe

- Process and Projects
- Teams of specialists
- Risk avoidance, Certainty
- Hierarchy
- Leaders know best
- PRINCE/2



Being Adaptive

- Data and Products
- Multi-disciplinary teams
- Risk taking, Learning
- Empowerment
- Teams know best
- Agile



Being Co-ordinated

- Digital and Data Governance
- Building organizational capabilities
- Balanced portfolio; aligned to mission.
- Collaboration
- Customer, Team and Leaders know best
- Whatever works best

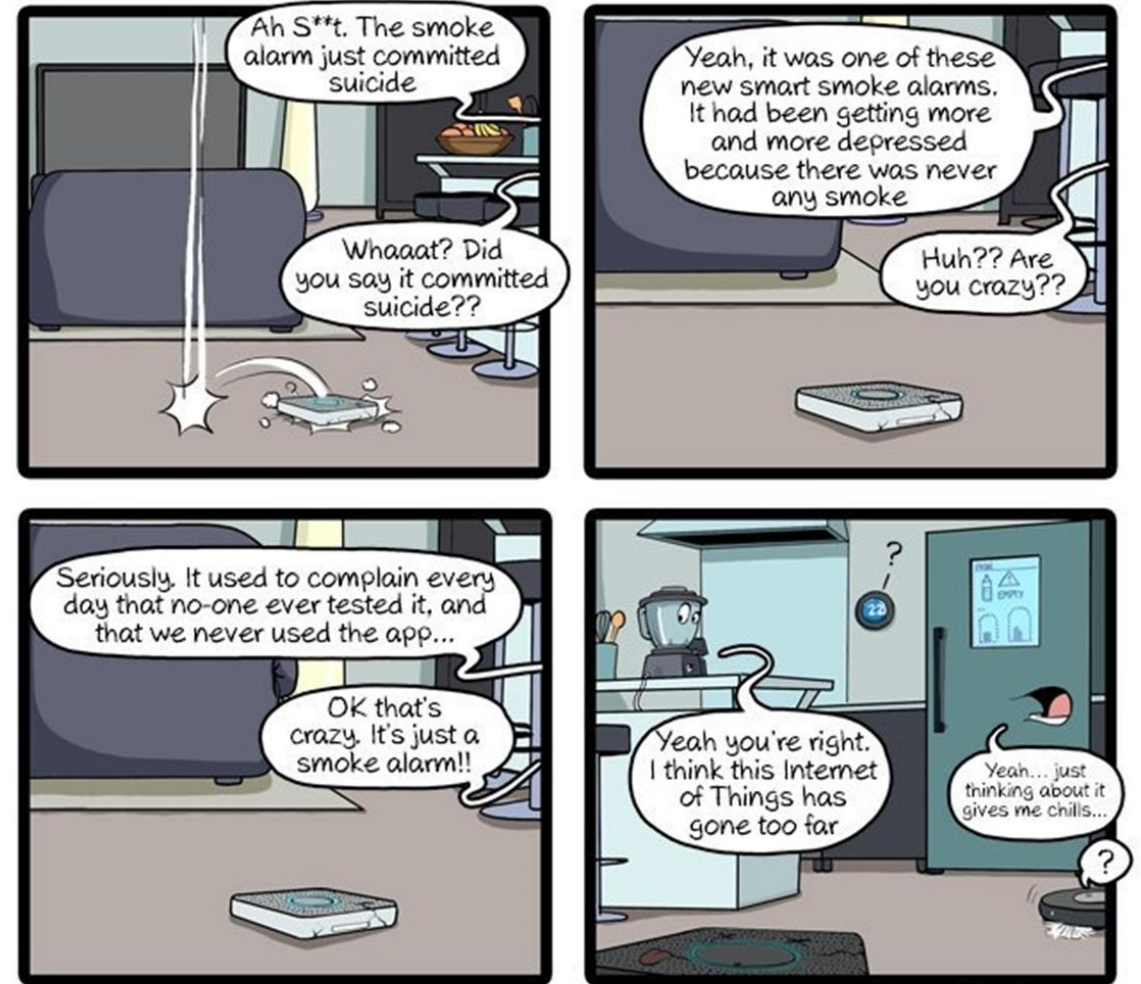
Building Innovation Capabilities

Two fundamental approaches to helping your TSO gain the capabilities and culture necessary

	<i>Mainstream</i> innovation capabilities	<i>Sidestream</i> innovation capabilities
Operating Model	Inclusive; capacity likely an issue; do you have the right “talent” in your TSO?	Existing teams may feel slighted; additional capacity a clear benefit; where to position role(s)?
Digital, Data and Technology Skills	Each department can source own 3 rd party help and access skills in digital/data/teams as feasible.	Skills sourced as innovation process/portfolio needs. Lower access to internal resources likely result in higher costs.
Form of Innovation	Existing services and iterative business optimisation?	More likely to ideate and test bolder ideas [at least in the function the innovation team sits]?
Funding and business planning	Can be incorporated into standard business planning cycles and departmental budgets.	Innovation budget and committee

July 17th

Digital Innovation Ideation



CommitStrip.com

Digital Innovation Drivers

Motives for strategic change and innovation

Operating Drivers

ESG/Non- financial Sustainability

Compliance (Privacy, Accessibility & Cyber-Security)

Changing supporter expectations

Hybrid Workforce/Events

Digital (& Knowledge) divide

Involving People (Staff, Volunteers, Supporters, Influencers)

Income, Assets and Expenditure.

Exploitation of Technology

Market Opportunities

AI & Knowledge

Web 3.0 (MetaVerse, Blockchain, Gaming et al)

Channel Opportunities eg Tik Tok Shop

Hardware, Devices and Drones

Emergent Solutions or Channels

Established Solutions or Channels (but new to you)

Existing Solutions or Channels (you can better exploit)

Service Providers (even consultants!)

Adoption of Technology

Mission

Scale out/grow impact

Evidence based practice

Improve "Beneficiary" Experience

New Service or Product

Community/Self Serve

Fundraising and Commerce

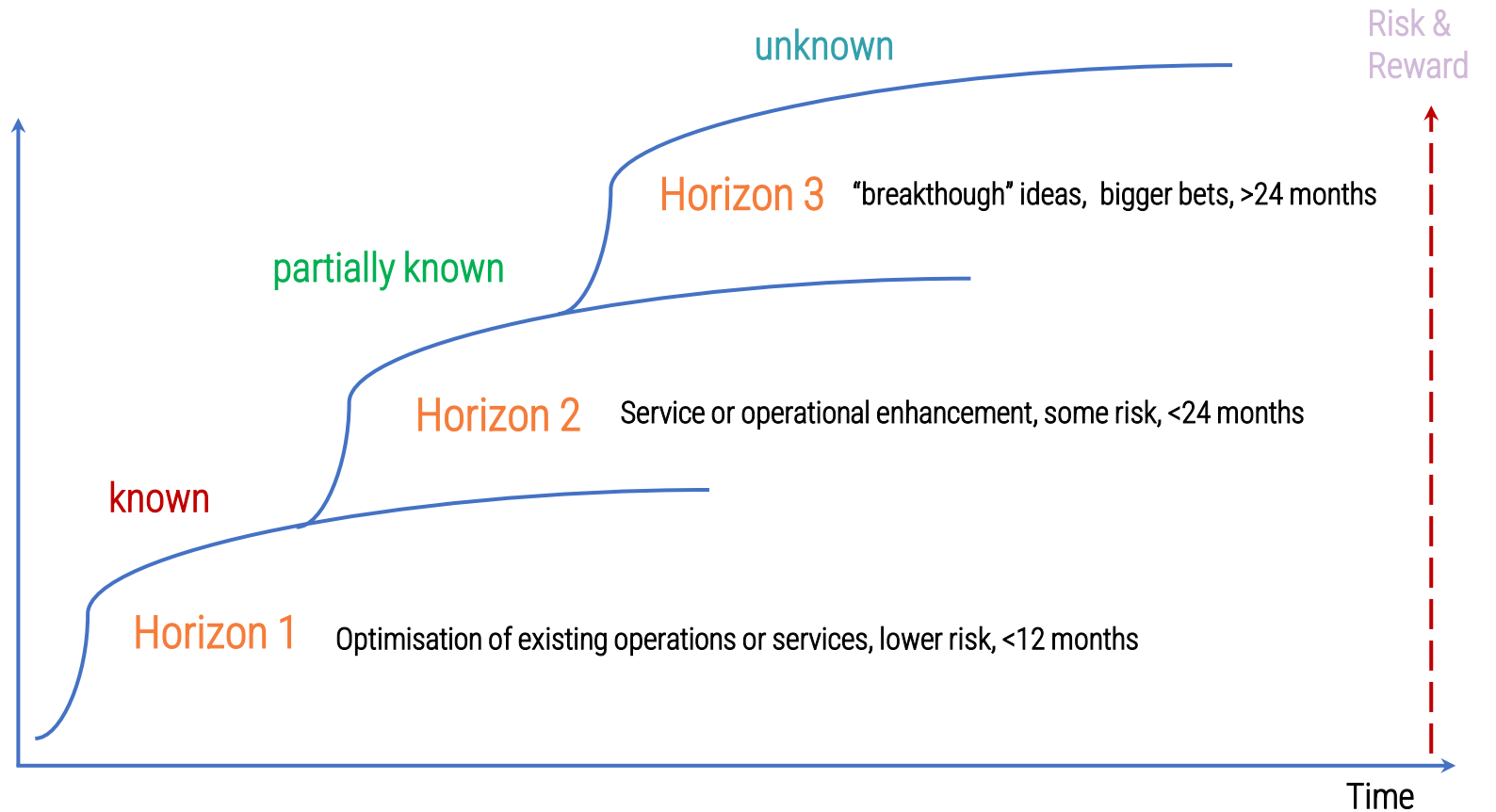
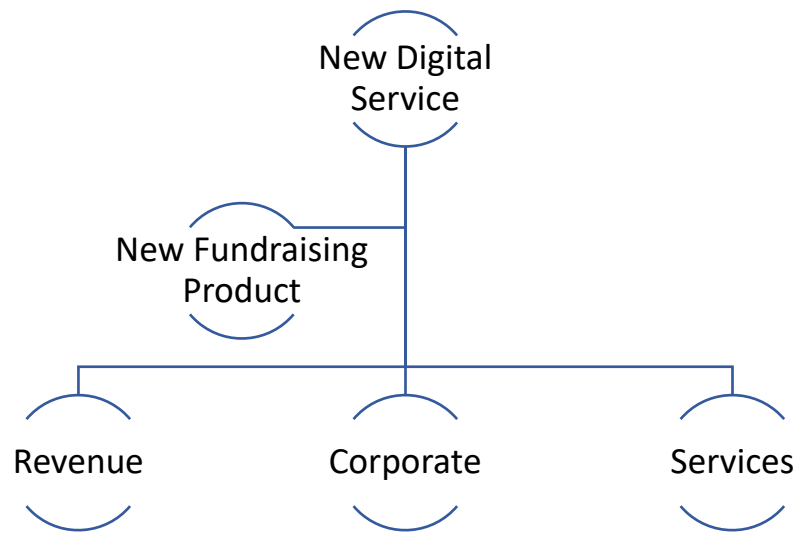
Partnerships

External Drivers or Policy

DDaT Enabled Evolution (or Transformation)

Innovation Horizons

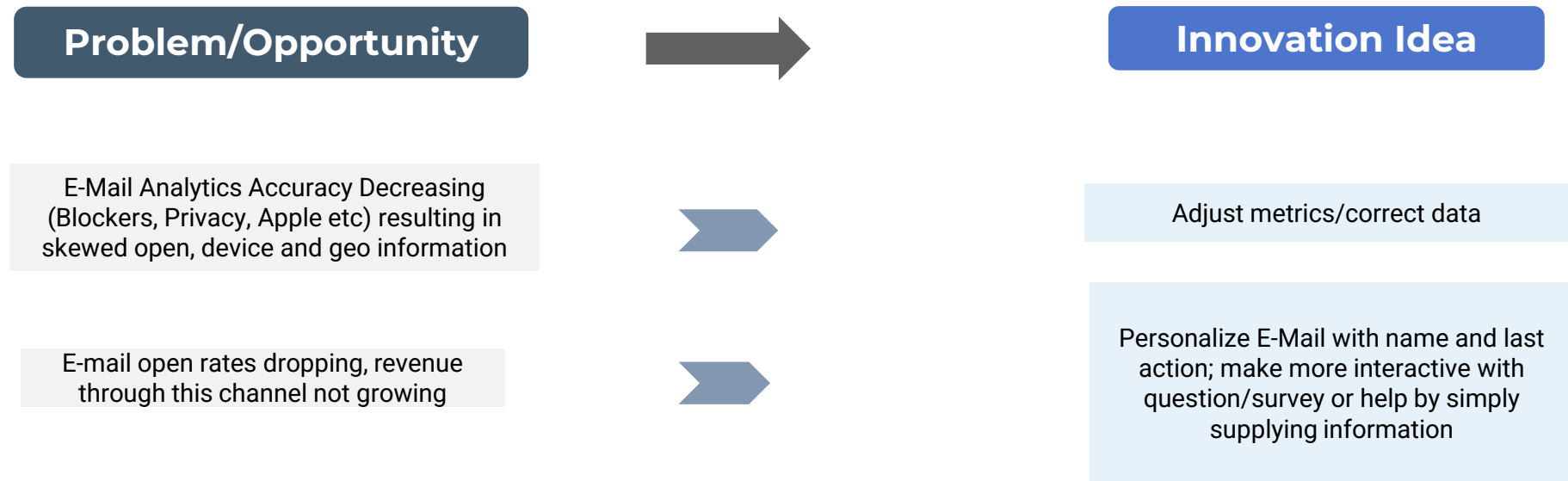
Consider spreading innovation resources across all 3 in any given budget year.



Source: McKinsey, 2009

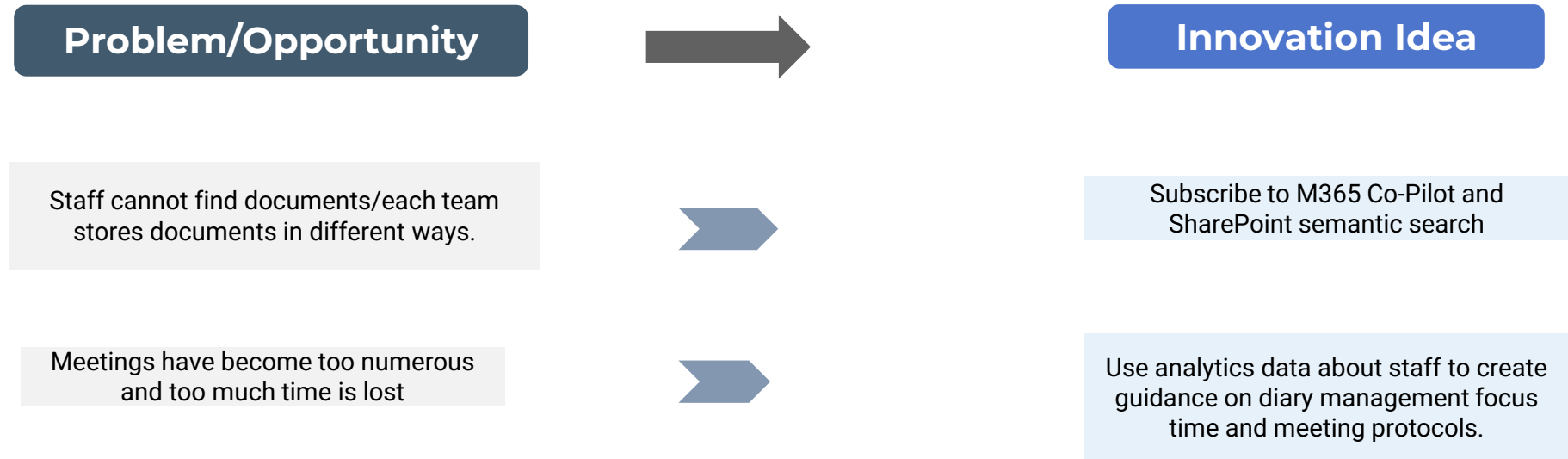
Digital Innovation

Horizon One : E-Mail Marketing



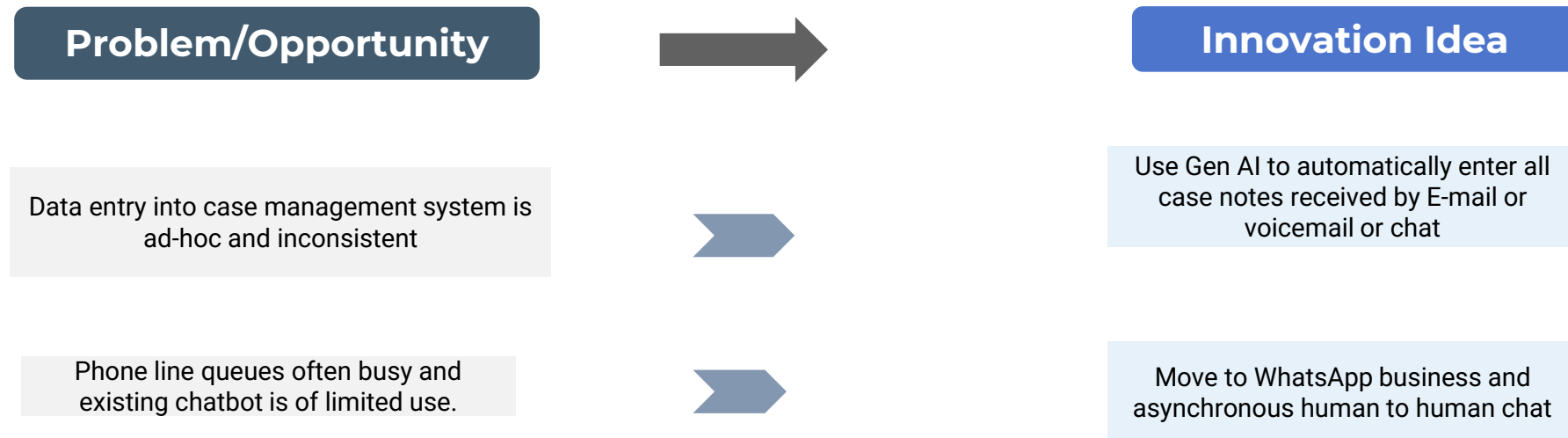
Digital Innovation

Horizon One : Staff Collaboration and Hybrid Working



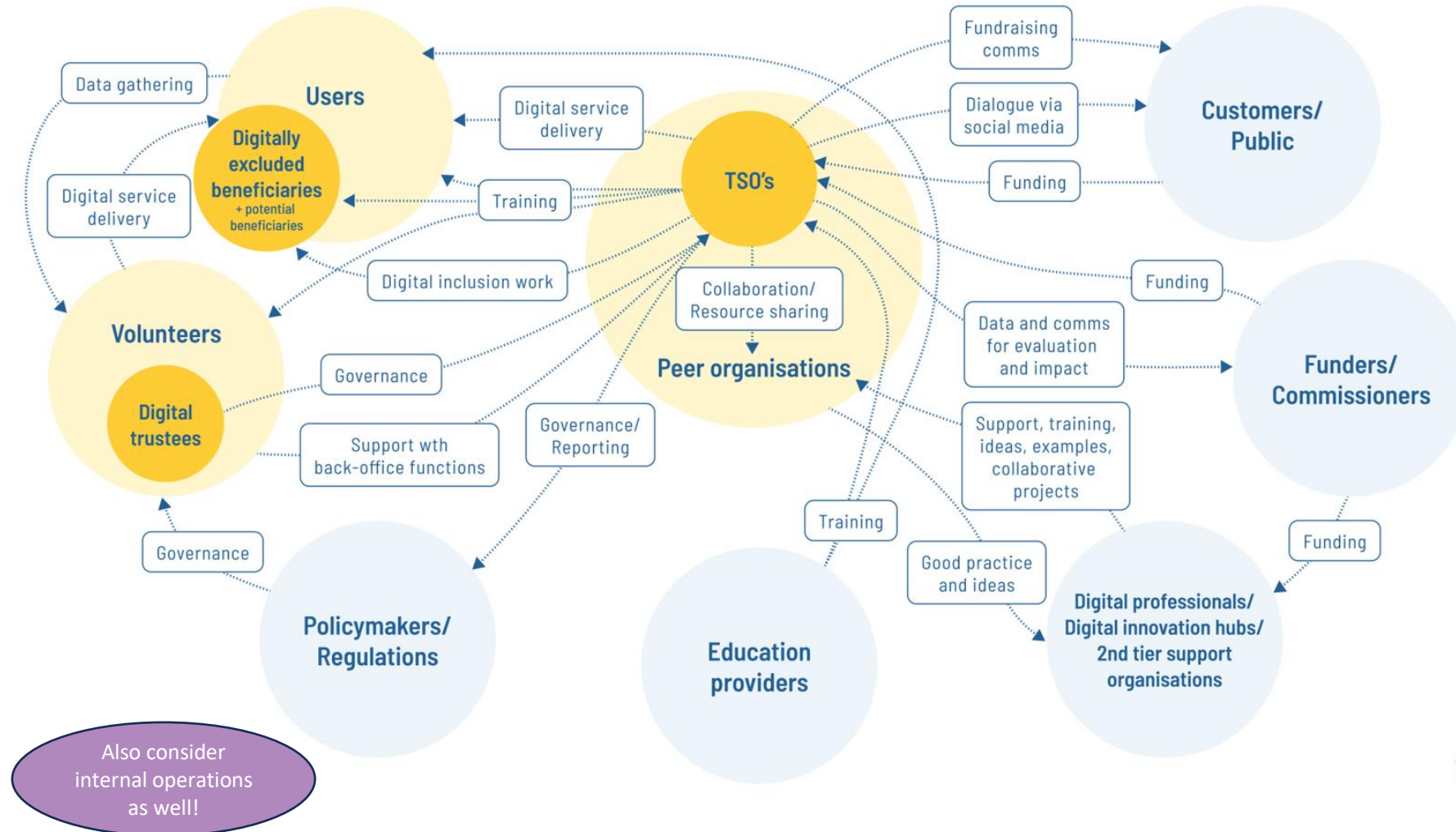
Digital Innovation

Horizon One : Service Provision



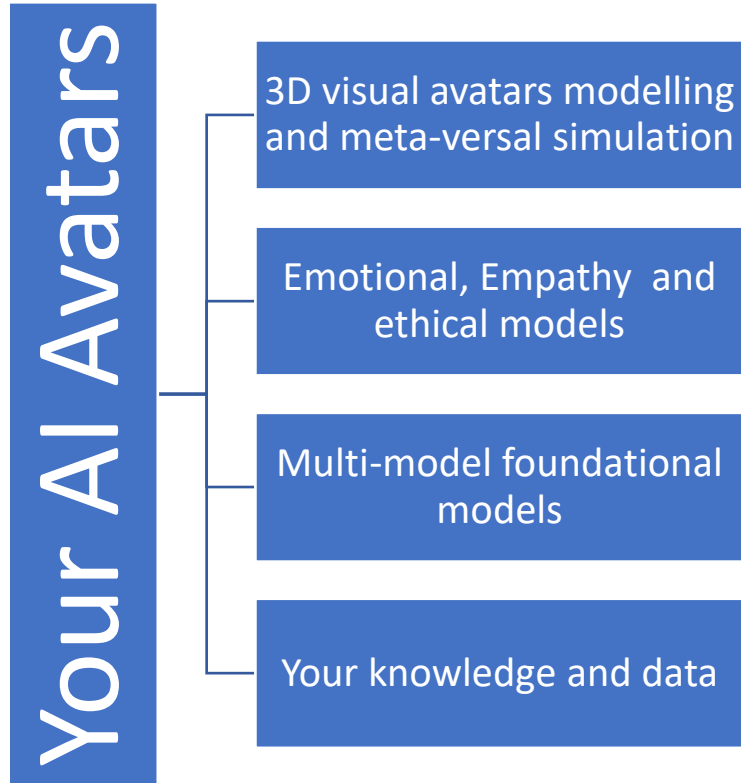
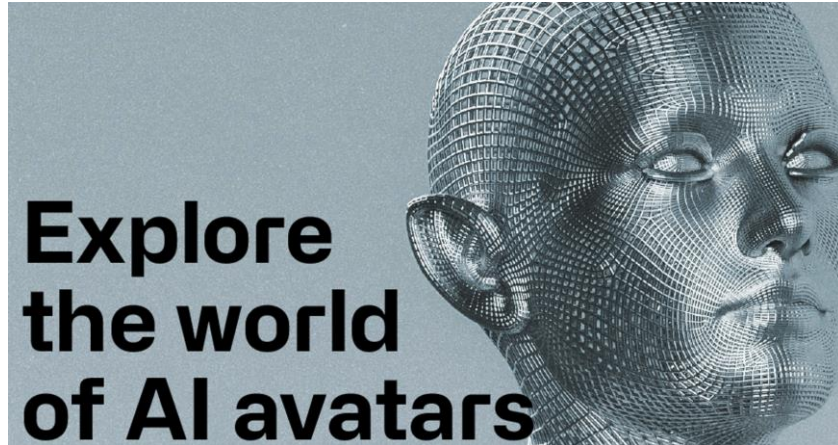
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Horizon Two : Review your ecosystem to scan for problems or opportunities.....



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Horizon Three : Look to market opportunities to identify where earlier adoption may make sense.

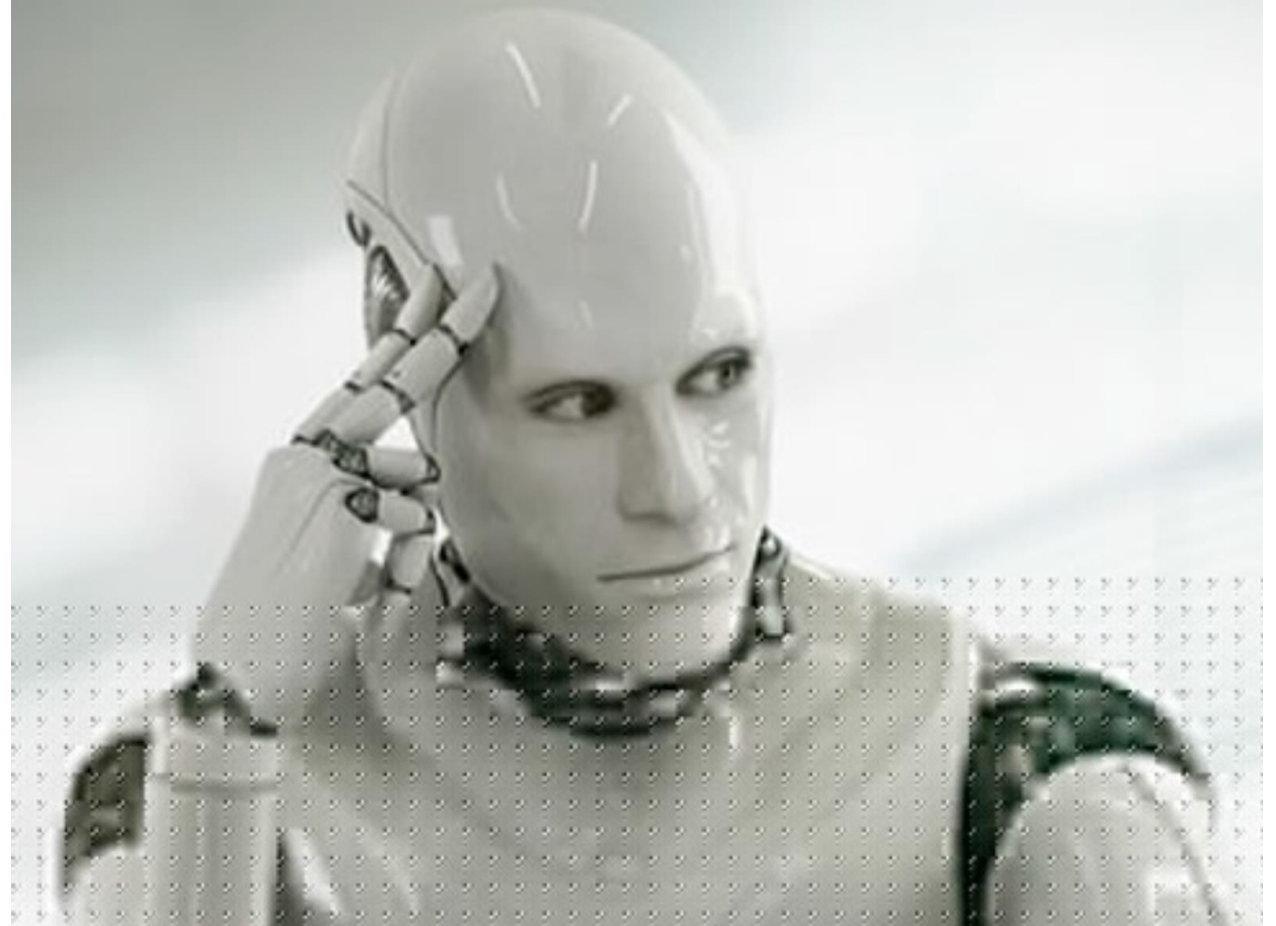


Is this fantasy or an inevitability? Could this disrupt your sector? How could your TSO ethically exploit such technology? How could you start to innovate in this space?

Innovation Workshop

Your Turn

- ❑ Everyone take 5 minutes to think of an idea that you would seriously consider taking forward at your TSO
- ❑ Spend about 20 minutes comparing ideas – which does your table find the most compelling?
- ❑ At the end we will ask each table for the best idea(s). The winner will receive praise and glory showered upon them by this audience group 😊



How to describe your Innovation Idea

I have an idea for _____ [a solution]. Based on initial research,
I think if we _____ [an action], then we will _____ [a result]
for _____ [an audience]. This is important because _____ [a need].

I'd like to try _____ [an action], which will require _____ [a resource].
As we test and replicate it, we will measure _____ [a metric], to determine
if it is successful and should be repeated at scale.

Remember : It needs to be feasible for your TSO to do. It needs to have a market or audience to succeed.



Discussion and feedback

Event feedback

Please use the QR code to view and complete the online feedback form.





Thanks & Goodbye!

Upcoming events...

CRM, customer data and cake

25 September 2024, 2pm-5pm, London

Grant management solutions and selection

31 October 2024, 2pm – 3.15pm, Zoom

www.adaptaconsulting.co.uk/upcoming-events



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