



# AMPLIFY YOUR OPERATIONS STARTER GUIDE

✦ *Developed for an AMPT Up Your Org workshop by Lenise S. Lee* ✦

Want more in-depth knowledge on your operations as a nonprofit organization?  
You can watch the full Youtube Recording [with this link.](#)

## Working **ON** the Business, not just **IN** the Business (What Are You Doing?)

✦ **CREATE THE VISION, MAKE THE PLAN, AND EXECUTE WELL.** ✦

### PLANNING

- Have a business plan, a strategic plan, and an annual plan
- Your To-Do List Should Have **Purpose** (consider starting with revenue generating, long and short term goals, professional development, and close with the minutiae)



### VISIONING

Cast your vision one, three, or five or more years out



### WELLNESS

Secure your oxygen mask first, and have a succession plan



### RESOURCES

- [Annual Plans: Beginner's Guide to Annual Planning](#)
- [Lean Model Canvas](#)
- [Clever Fox Planner](#)
- [The Eisenhower Matrix](#)



## Examine the Ins and Outs of People Management: (Who's Helping You?)

✦ **SET EXPECTATIONS, PUT THEM IN WRITING, AND MANAGE THE RELATIONSHIPS** ✦

### COMMON ROLES in NPOs:

- Board Members
- Consultants
- Contractors
- Staff
- Volunteers



*How do you define these roles and what do they do in/for your organization?*

### RESOURCES

- NCN's [Board Roles and Responsibilities](#)
- NMBL Strategies' [3 Key Differences Between a Working and Governance Board for a Nonprofit](#)
- SHRM's [Employing Independent Contractors and Other Gig Workers](#)
- G2's [Volunteer Management: How to Develop an Engaging Program](#)



# Explore Practical Tools and Techniques for Efficiency: (How Are You Doing It?)

EVALUATE THE TOOL, INTEGRATE IT WITH OTHERS, AND AUTOMATE THE PROCESSES

Automation, Integration, and Documentation are Key. Read the Manuals and Watch the Tutorials.

## ACCOUNTING SOFTWARE:

- Manages and records the day-to-day financial transactions (including income, expense, AR, AP, assets, and liabilities)

e.g. QuickBooks, Aplos, and Software4Nonprofits



## CUSTOMER RELATIONSHIP

### MANAGEMENT (CRM) PLATFORM:

- Manage interactions with a customer, capturing key information generated during those engagements.

e.g. Salesforce, Zoho, and Hubspot

## DONOR MANAGEMENT (FUNDRAISING) SOFTWARE:

- Manage donor contributions and documents relationships and communications

e.g. Kindful, Keela, and BlackBaud

## MARKETING SOFTWARE:

- Helps businesses successfully execute campaigns and communicate with their target markets.

e.g. Canva, Linktree, Hootsuite, MailChimp, and Constant Contact

## CLIENTFLOW OR CLIENT MANAGEMENT PLATFORMS:

- Allows you to organize, streamline and automate your client process (scheduling, emails, contracts etc).

e.g. Honeybook, Dubsado, Calendly and Acuity

## PROJECT MANAGEMENT SYSTEM:

- Used to plan, organize, and allocate resources for projects, programs etc.
- Helps teams collaborate and keep track of their progress while clearly defining tasks and responsibilities.

e.g. Monday.com, ClickUp, and Asana

## HUMAN RESOURCES SYSTEMS

- HR Information System (HRIS): maintains, manages, and processes employee information and hr-related policies and procedures.

e.g. ADP, Rippling, and Paylocity

- Human Capital Management (HCM): Both a set of HR processes and the name of the category of software. It is a set of practices and tools used to attract, recruit, train, develop, manage and retain employees. e.g. Zenefits and Paycor

- Payroll Systems: Automates the process of paying salaried, hourly and contingent employees (and in some cases contractors). e.g. Gusto and Workday

