



CharityComms podcast – Episode 1, pt.2 transcript

Robyn: Hello everyone and welcome back to the second part of our first episode of the CharityComms podcast; Digital leadership and challenging the status quo. My name's Robyn and I'm the events officer here at CharityComms.

Sushi: And my name's Sushi and the Digital manager at CharityComms.

Robyn: Thanks to everyone who listened to part one of the first episode, we had so many lovely comments and we're really happy that it's been so useful.

Sushi: Thanks to everyone who gave their tips and thoughts on improving the quality sound, we've taking them on board and have decided to invest in some kit for the second episode, as well as learning about noise reduction, which we hope you'll hear in this episode. We're super excited about learning more about the technical side and I feel like I've picked up a lot in the last couple of weeks. Those of you who follow me on Twitter, @Sushi_Juggapah, you'll know I've been truly geeking out. If anyone wants to find out more about what we've been up to or the technical side of podcasting, feel free to get in touch, I'd love to chat to you.

Robyn: So, for the second half of the episode, we got into it with two digital leadership experts; Zoe Amar, of Zoe Amar Communications, and Brani Milosevic, a freelance digital strategist and consultant. We discussed digital leadership in the sector, from senior leadership buy-in, to empowering yourself to make those changes. We hope you enjoy it!

Robyn: So, Hi Zoe and Brani, we're thrilled to have you both here to get into the increasingly important subject of digital leadership. Zoe founded Zoe Amar Communications in 2013 and has worked with a range of charities since, alongside writing for *The Guardian* and co-authoring the Charity Digital Skills Report and the Charity Commission's digital guidance for trustees - welcome Zoe.

Zoe: Thank you very much for having me.

Robyn: Brani is the founder and director of Digital Leadership Ltd, having forged her digital leadership experience spending 15 years working with some of the UK's biggest non-profits - thanks for joining us, Brani.

Brani: Hello.



Robyn: And was it those 15 years that made you think, these charities need some help.

Brani: Yes, probably!

[Laughter]

Brani: Too much experience working in-house, definitely.

Robyn: Yes.

Brani: But also, I used to work with other colleagues from other charities, because I was part of coalitions, campaigning, etc. So I got a fairly broad picture of what's happening in other charities, not just the ones I worked for.

Robyn: Would you say that's a similar experience, you having worked in the sector a long time, you've got a good grip on where we're lacking and where we need to be moving forwards on.

Zoe: Very much so. So this year actually marks my tenth year of working in digital - it's come around very quickly. So before I set up my agency which has been going for five years now, I worked for four-five years for a charity which advised other charities and government bodies about how they could use digital more effectively. And it's interesting looking back on that period, a decade. The charity sector has moved forward with digital but there is still an awfully long way to go. And people and really good leadership is absolutely fundamental to that..

Robyn: Hmm, fantastic. Um, Sush warned me that I'm already starting off by saying the wrong thing, which is that I consider myself a digital novice. At least around this table, I'm the digital novice of this group, so I'm thinking it might be good to define what we mean by digital leadership, what it means to be a digital leader. I don't know if you had something off the bat to define it?

Zoe: Absolutely, great place to start. Digital leadership is just about using digital so you can be a more effective leader. It's really leadership that's fit for purpose in the modern digital world. There's not a lot more to it than that. And I think it's a real test of leadership qualities that have been there for centuries. So how good you are at collaborating, how good you are at making decisions, how strong you are at bringing people with you. That's always been true of leaders. But digital has really challenged the way you would do that. And is a real test of whether you can do it effectively. So it's a very exciting time to be a leader and to work in digital.



Brani: And I suppose what I would add is, I totally agree with that, that's a lot of the things you were talking about is just the definition of leadership. But I suppose what digital has brought in, and what I've seen in the digital sector, especially is, actually people management and how you manage people to lead digital. So I work with lots of digital leads in charities and what I find unfortunately is that they're not managed in the best possible way. And this is the challenge of management really. So, which is again, goes hand and hand with the issue of leadership.

The other point around digital leadership which I would probably add to that is that being a leader in the digital world requires a really wide range of skills and leading digital in today's world requires you to understand the brands, understand the messaging, the policy, to understand retail, to understand political campaigning, to understand IT. So the range of skills and understanding that you have to have in order to lead digital is pretty wide.

Zoe: I think you've absolutely nailed it Brani. I think being able to be an effective digital leader isn't just about the detail, it's about being able to really understand digital in context, and specifically, how you can use digital to drive your organisation forward in a highly competitive, very volatile world.

Robyn: And also of course, you do share this common goal of achieving and championing digital leadership in the sector - you sort of have digital ideas on the approach of how to get an organisation where they need to be. I dunno, what would you say, in a nutshell, or is that not very fair? In a nutshell, what do you reckon needs to be happening in the sector, or where do you see the sector in 10 years? Like what an organisation would look like.

Zoe: It's a really excellent question because I think the charity of the future, as in 2028, is going to look really really different. So if we think about particularly the large charities today, I think running a large charity at the moment is actually really challenging. You've got a lot of bricks and mortar; you've got a lot of people; you might have a pension deficit that you've got quite high fixed costs. Individual giving is going down and that model doesn't necessarily lend itself well to digital. So I would hope by the time we get to 2028, we would be talking about charities having a more fluid structure.

So if we look at a relatively new charity like CAST, they actually have a small nucleus of about 10 staff in the core team, and then a wider network, I think it's about 40-50 people, who can come in and work in an interim basis, or freelance. And they have a very very digitally-savvy board, and a CEO that really really gets it. So I would hope we're going to have more charities that look like that in 10 years time. That to me is a truly digital organisation.



Robyn: Yea, sounds like an organisation that is quite well prepared to adapt to change. Which I think - sorry you can go ahead.

Brani: That is what the book on digital transformation, by Lindsey Herbert. She was saying, her definition of digital transformation is - and there are so many definitions flying around - but her definition is, which I totally sign up to is, being digital transformed means - I'm paraphrasing - means being ready to change, being able to change. Being prepared for the change itself, something like that. So to be digitally transformed means being ready for the change itself.

Robyn: No, I definitely see that, especially because, whether you like it or not, the landscape changes so fast. It's sort of do or die really. If you're not keeping up, you're just being left behind.

Brani: Well I don't like to say I told you so...

[Laughter]

Brani: But I have been chatting to fundraisers for some time, and I did say to them, the model they're using for fundraising is going to eventually fail. And I've been bombarded by loads of stats which prove that I'm wrong. So now, a lot of people that come to talk to me doing more on digital and digital transformation, the reason why they're doing it is because fundraising is increasingly failing. Or rather, the projections are showing its going to fail. So, it's clear you have to respond to the changes you see around yourself, not just - I mean, GDPR is also something we will touch on. I was reading The Economist last week, or the 2018 predictions. One of the things it says there is GDPR is going to change business models. And that is so clear when you look at the spirit of the legislation. The discussions that are happening at the moment are around how we can game it. I find that increasingly concerning, because the spirit of the legislation totally aligns with the charitable spirit of helping people to act on their rights to protect their data. And this is not really understood on the charity sector and it is a concern because really this is kind of showing where it's all going, and it is going to change the model and not just in the charity sector, obviously retail is going to suffer as well.

Robyn: Well, I think GDPR is a really interesting example of how it's difficult to future proof these sort of things. This came out last year, and early on last year we started sort of having this sort of conversation with people saying, what is it and what does it mean? There wasn't necessarily real clarity around it in the beginning. And then people had to work really hard to catch back up to the developments and the implications it had for digital. So, you can't always see, well I think that's one of the trickiest things about digital, you can't always see what's going to be the next innovation and the next challenge.



Brani: I'm sorry I will have to interject here.

[Laughter]

Brani: Because actually, any digital person is going to tell you this is what we've been arguing for since the Web 2.0, really, which is have a conversation, don't do broadcast, talk to people where they are, be nice to people - that was always the principle of social networks and the digital world. And it's just constantly fighting between that and the need to raise money and old the marketing model, and now it's just come to a head.

Sushi: It feels like it's a - it's just a - almost like a kind of re- ...lifting up the original data protection laws as well. It doesn't feel like it's completely new thing. It feels like it's a reaffirming of what we already had.

Brani: We were just gaming it for years and now we can't anymore.

Sushi: And now you can't, you're gonna get a bit more telling off.

[Laughter]

Brani: Considerably more.

Robyn: Zoe I think you were going to interject there.

Zoe: Yeah, I think the really interesting thing about is obviously that its very principle driven legislation, as Brani was saying. This as with a lot of other digital developments is really a test of your ability as a leader to respond to change. And to adapt to that change and to do it quickly as well. And that's another characteristic that's very important for digital leaders. Being able to work at pace and to make decisions quickly and act quickly is really fundamental to doing it well.

Brani: But I also think awareness of the market and awareness of trends, that's one thing that again, I find not many charities have. It's mostly fundraising departments who have some understanding of what's going on.

Zoe: I think that's absolutely right - I mean one of the big trends that we're seeing in our work is that charities, just like every other organisation, have got to start investing some time, even if it's part of an existing member of staff's job, preferably someone in the leadership team in doing that horizon scanning and understanding what trends are coming across the horizon. And say, for example, talking to charities a lot about emerging technologies, things like artificial intelligence, the impact that could have on business models, and very few of them are actually preparing for it. And we know that



automation is going to be a very very significant development that could have an impact on a lot of jobs. So absolutely, you need leadership and leadership teams in charities who really get it and aren't just looking at what we need to do now - making sure we're ready for GDPR and other areas, fundamental though that is - but actually, what could my charity look like in three years.

Sushi: Do you see some charities doing that though? Examples of some charities doing and maybe doing it well? Or is that completely just not happening in the sector?

[Laughter]

Zoe: The emerging technologies side of things?

Sushi: Yeah, like having someone future-gaze and imagine?

Zoe: I think the charities who are doing that well are slightly ahead of the curve on digital already. So to them it's almost business as usual and keeping up with trends. So just off the top of my head, I think organisations like Autistica, The Mix for example, again which goes to show you, you don't need to be a huge national, very well resourced charity in order to do that effectively. There's a few other organisations I can think of, but I'm not sure if I'm allowed to say they're doing work in this area. So some are doing it but it's a really, really tiny minority of organisations and we need more charities to start preparing for where we need to get to now, but also in the future.

Brani: Yeah, I would definitely echo the last bit that you said because what I find is that sometimes charities would go immediately for the kind of horizon scanning but there's loads of basics they could fix. And that's the stuff I enjoy doing the most which is basically working with the team and the organisation and saying, well actually, if you look at your donation form - and I'm sorry to say but still, a lot of improvements to digital outputs could be made just by improving the forms - which is nothing innovative, nothing horizon scanning-y, nothing future gazing-y, but it's just get your basics right and then start looking at the bigger picture as well.

The other thing I find - and it's interesting the example you've given - is that the service delivery sector charities, especially health, charities delivering services to people, are much more bought into this whole idea that they need to embark on changing things. It might not be as quick, it might not be as well funded but the awareness is there. I come from the international development sector, that's where my background is and where I spent most of my career, environmental sectors - that kind of push doesn't exist, of course it's a no-brainer to say automation is going to make our service delivery better because we're going to be reaching more people faster. Like, it's very hard to argue against that. With organisations that work on



programmes overseas, that kind of argument doesn't necessarily flow as easily, so mostly the argument is around fundraising, marketing, which is harder to make the case for. Because all the systems are set up to do marketing and fundraising in the way its been done 50 years, so it's a different dynamic. But that's why I've found most of the health charities today are actually looking at all these different things, and making small steps, to improving their efficiency by using digital technology in the process.

Sushi: So do you think the risk actually, for international development charities, potentially is that they fall back, because they're not focusing on innovations. Because they do do service delivery in some respect, or they contract out to different organisations or charities in the country. But what if there are innovations in those countries, by small start ups and they are delivering things more cost effectively.

Brani: So, my experience of that is actually, there is something called Communications for Development, which started up in 2000, and I used to work on that for a few years, which was exactly about that. It was finding technologies that are appropriate for the local market. So, for example, M-Pesa or front line SMS, so those are all the services that were developed with that idea behind it. In my experience, international development actually has fantastic use of technologies in the delivery of services, especially around disasters - so I think they are actually fairly good and well set up there - what I find frustrating is that on the marketing and fundraising side, it's very much, "flies in their eyes" pictures of kids, it's very much the way fundraising used to be done during Live Aid basically. And it is that audience they are hitting as well, and it is that kind of audience they're interested in as well. And I suppose now that's changing because that audience is no more, purely because life is finite.

Sushi: So, you think, I know we're not trying to focus on international development charities, but do you think that is an area they have to pay attention to now. Because obviously they do want to - they want to seek out the future fundraisers, they want to build that community that will help to support their activity.

Brani: Yeah, I think they have a much harder case to make than health charities, for example. Because the research shows that a lot of support that comes to health charities comes because there is a personal experience of an illness, either in the person or in the family or friend's family, the immediate surroundings. With international development it's out there. While the audience is getting older, there is a reason why they were moved by those stories. It's a very hard task for international development to make the case for being supported by - the storytelling side of things is really important, and I think that's why a lot of them are focusing on that. So, it's going to be hard sell for sure. They're having a lot to do.



Zoe: At the same time, I think there are some really interesting examples of digital innovation in the international development sector. So you were just talking about storytelling, and for me, SolarAid very much pioneered that approach, largely because of the leadership of Richard Turner, their head of fundraising. And they make great strides in that area, had a lot of success from it. Many charities have followed in their wake. I also think there is some really interesting work coming out of CARE International UK at the moment, where they're doing some really interesting work around how they can position themselves as a more effective employer using digital channels. So I think there are some really interesting things going on in a lot of different sectors, within the sector. But we need to champion and really hero those examples a lot more...

Sushi: Yes

Zoe: ...in order to encourage other charities to go on the journey as well.

Robyn: Yeah, obviously, digital innovation goes right through the charity itself, and beyond the charity, into all the external routes it uses to reach people, to communicate with donors and everyone and beneficiaries. So it sort of begs the question, where do you start? I know there's probably no real answer to that. But if you're sort of thinking, this all sounds great - I would love my charity to be better on track with this - I suppose it depends who you are in your organisation, but where do you start?

Zoe: It really starts with the people. It starts and ends with the people. So, the question we get asked on projects, where do you start? This really depends - it will stand or fall on how good your people are with digital. So, I would start by understanding where you need to get to but also, do you have the right people to deliver that. So what skills do you actually have in the building and thinking about how you can close those gaps. So, it's about having that real clarity of vision and what you need to do to get there. Thinking about what resources you need in order to achieve that. And then making sure you really, as a leader, keep people on track. And do you have that momentum towards achieving that vision.

Brani: A lot of the work I do is around digital strategy and digital transformation and the main thing I always look for in the process is what are the quick fixes, so the donation form is an example of give. Another example is, most of the time when you talk to people there is something about the website that everyone is united in hating so there's always an opportunity to fix that. Very much to what Zoe was saying, in order to be able to move on it, we need to understand what you're trying to do and then set up the skills, the roles, the technology and the processes that are going to deliver that.



So, one of the ways I try and make it simple for people to understand where to start is by focusing on a supporter journey. So, if you identify who are your main types of supporter, like profiles type of thing, personas. Design a few journeys in terms of how you would - over let's say three months - how would you want to engage them with your charity. And then once you've designed the process, have an internal discussion saying, do we have the skills to do this? Which is the question around, who is going to do this automation and who is going to be looking at all the stats that are coming out in order to tweak it to make it better. Do we have enough content? If we don't, who is going to produce this content? Where is this content going to come from? Do we have the right technology, so we want to do this automation, we want to look at the data and query it on a regular basis - can we do that? Why can't we do it? What should we do to be able to do it? So, it's basically finding quick fixes to be able to do that. But one of the things I find most fascinating, is that all that's fine, but actually, where the quickest changes can be made, is around processes - how people plan and how people work together.

So, I had a client where that was my main recommendation, it was through the process, we hadn't completed, and I said to them, I actually think you could definitely achieve much more if you work together, rather than in separate teams. So, Christmas campaign, they were planning each team separately. Then I look at their stats, and basically the traffic to the website was 25% up but the income was 25% up. Now that is not to be ignored - that is a huge difference year on year. So, I said to them, why is this, because I can't see anything in the stats which explains to me why this is happening, so it must be something to do internally in the process, can you tell me what's happening? They said, well actually it's the first year we totally all worked together. We planned it all together. So, I said to them this is a perfect example which proves to yourselves that you should continue doing this over and over again. So, there is all this big stuff, big insights, big planning, big budgets, but actually, just have a look at how you work internally. And seriously, the silos I've seen, in organisations of 15 people, I just find it absolutely amazing.

Sushi: I've never worked at a charity where there wasn't silos.

[Laughter]

Brani: I worked for big charities and I thought silos was a consequence of being in a big charity, but no, I also saw small charities which have silos, so just get rid of it.

Sushi: Yeah.

Brani: And think about that end supporter. I think that audience focus. Focusing on audience, focusing on supporter, constantly thinking with that



hat on does unravel all these other things and it stops being overwhelming because you start understanding why it's all connected. Well if you start coming with the big bang stuff without enough awareness internally it might be confusing.

Sushi: And if anyone wants to read more about Brani's approach, she has contributed an article to the Knowledge Hub about that - we'll link it at the end of the podcast.

Sushi: So, it's this relentlessly focused on your end user, that's your starting point of how you think about change. Sounds like both of you agree on that.

Zoe: Yeah, that's what Marie Curie did with their digital transformation. So, my understanding is that it very much began with really, mapping out those supporter journeys, understanding all the different touchpoints, on and offline, thinking about how they could support people at each key stage. And actually, that's a really good tool to help your CEO and your trustees understand digital. Because you are putting them in the shoes of their supporters and the beneficiaries and that's really powerful.

Robyn: Talking about the fact that we need to really get everyone on board, ultimately, it does mean that there are a lot of people working in the sector at the moment who, when they came in, it was a very different landscape, and maybe if you weren't actively paying attention to how digital was developing, maybe it's just, in a way, passed you by. And so, I was wondering what your thoughts would be if you're a person that's identified that in yourself, or if you are someone who works with someone like that, the best way to try and help get them back to grips with digital. I'm not sure if I've got the right phraseology but you get what I mean.

Zoe: Absolutely - it's about how you motivate people to change. And there are two ways to do that - speak to many psychologists and they'll tell you. The first one is very much about the cost of not responding. And so, helping people understand that actually there are other similar organisations to you who are doing this stuff. And they might not just be charities actually. So many of the organisations that we work with, increasingly they're seeing their competitors could be corporates, could be social enterprises. So, helping them understand what the result is of not moving forward with this. It could also be things like not getting enough digital fundraising. But then also the positive reinforcement as well - so if you did this, what would it mean? And most likely, it would mean you can have stronger relationships with supporters. Obviously, that's a real driver behind GDPR, as you were saying. It can mean you're just going to be seen as more relevant and better able to respond to change really quickly. And so, it's really thinking about how can you motivate people to change.



Robyn: I suppose the quick wins come in there as well, where you can be like; "we did this, and here's how it's changed everything!".

Brani: Again, health charities that are speaking about that. Actually the way to enthuse people about the change digital can bring in is by doing some small fixes to the process which everyone got excited about and then they're all much more open to talk about things. That could happen. But the other thing, you were saying earlier, you're a digital novice, and actually I don't believe that anyone is because - well actually, there is probably a percentage of people that are, there are 10% Ofcom says of people who are digitally uninitiated - but every day you are part of the digital world we live in. Every day, you're using your Oyster or some such. You're paying with your credit cards and using the contactless. You are using a mobile phone of course. You're shopping online, we're a nation of online shoppers. So, it's actually dismantling the fear people might have by doing it. Someone was saying to me when people in their team said, oh I need training on how to use WhatsApp and she just said to them, have you tried...?

[Laughter]

Brani: Because that's the thing, you can't break it.

Sushi: It is interesting, when you get that kind of - people are well embedded because they have smartphones, they use technology every day. But the fear of technology in your professional life sometimes is quite interesting. And that question of, "can you train me on how to use WhatsApp" - yeah, [to Robyn] did you get training to use WhatsApp? I mean, you use it every day to badger me.

Robyn: That's how I got really good at it.

Sushi: I find that really interesting, there's something about - that's where I wonder if it's not just the skills we need, but attitudes. And there's an attitude of, I'm just gonna give things a go, I'm gonna try it and fail. And that attitude is part of a digital culture that is part of being digitally savvy.

Zoe: Yeah, absolutely, it's very much about encouraging people to be unafraid of failure, and as you say Brani - taking those small actions to build confidence. Confidence is really really key to do effective digital leadership. And that can be something as simple as, I know what I know, I know what I don't know, I feel comfortable asking for help and also just trying out some things and giving it a go. You're not going to break the internet.



Brani: I mean the other thing I find working with clients who are going through huge change is that the technology that is being provided by the organisation for people needs to be appropriate. And a lot of the times, you will find that people's personal devices are better quality and more up to date than what they're getting from their employer. That is deeply frustrating, and it is used as an excuse to not buy into change. Because there is that thing as well. It's like the things are changing, I know I can't stop this - so it's finding an excuse of why they can't. They would definitely do it if only they had the appropriate technology. So, there is a little bit of that. But it is true to say, you do need to address the issues, especially around remote working for instance. I mean, volunteer expenses, I don't know any organisation where that's isn't a bit issue. Volunteers hate it because it's so complicated, so bureaucratic and takes so much of their time. What if we actually had a system that does it simply. So those kinds of things are important to think about as well. This is where the big investment comes in as well.

Zoe: I think that's a very interesting point actually because, now, it's not just about the supporter experience or the beneficiary experience. Increasingly, it's also about the employee and volunteer experience as well. And I think that is really important for digital leadership because, my concern is that I'm seeing a lot of very talented people leaving the charity sector now - particularly at the junior or middle-management levels - because they are getting deeply frustrated by the pace of change. And we cannot afford to lose those people. So, charities need to think about how can we position ourselves as an attractive employer, and attract that talent, and retain that talent and develop that talent. Because that is how we are going to grow the digital leaders of tomorrow.

Brani: Yeah, and this is exactly what I was talking about in the beginning. This is a failure of leadership and management I find sometimes, because you find young bright things, who are landed with a huge digital project and totally unsupported on leadership and change management. So, they either get bullied, or they get really frustrated and leave. Because there is this thing, you either do leadership - it's a skill, it can be taught, people can be mentored into it. There's loads of things organisations could be investing, to build up these young digital leads, or not necessarily young, but junior, who haven't necessarily had the experience of senior leadership. You can build them up because there is a lot they can bring, apart from the skills, they also have the values of the organisation at heart. So, there is a lot of reasons why you would want to keep them on board. And I just don't necessarily see that that is happening much.

Robyn: Well we here at CharityComms are big advocates of mentors, obviously, we've got a mentoring scheme. So, 100% agree. If you're someone who feels like you've got knowledge to share, become a mentor, so valuable.



Brani: I'm one, I love it. I think it's brilliant. I think that's what gave me this insight because I have worked with a few people through CharityComms mentorship scheme and it is sadly, when I speak to them, it's clear to me they are already thinking about leaving.

Sushi: But this is also what Digital Leaders is as well, this is what your product, Digital Leaders does. It's giving people, it's the people skills.

Brani: Well this is a slightly different tack, and I suppose Zoe and I have spoken about this - but we can elaborate on this a bit more. My thinking about digital leadership is really looking at digital leads and developing their skills to help organisations in the process of digital transformation. Because what you do find a lot, and I've been a digital lead, so I speak from experience, we can be arrogant, we can be really irritating and sometimes it's because you're not aware of the discussions happening higher up, the relationships happening higher up the organisation. So, the Digital Leadership Forum, is something I organise once a year, and then we have quarterly refreshers, that's exactly the space, aimed at digital leads to work through these tactical relationship skills. So, it's not about, do you know how to develop a website? It's agile or waterfall or whatever, you probably do. It's more about, how do you influence? How do you influence your manager? How do you influence up the hierarchy? How do you develop yourself as a leader? Because most of the time, these people - bless them - have a to-do list as long as their arm, they won't have time to develop their skills in terms of how they are communicating to their managers and all the rest of it. And they really need to, they really should, because that's how they're going to get those wins. So that's the area I was looking at, this bottom up approach. But Zoe, I know, you're looking at the top down as well.

Zoe: Yeah, you're right, we work a lot with CEOs and trustees. So, it's interesting, when you were talking about your experience there because I was thinking we've had some similar experiences on the digital leadership programme that we run with School for Social Entrepreneurs. And you're right, it's absolutely about encouraging people to be more resilient and to develop those persuading and influencing skills. And also just to understand that all of this stuff driving digital change is stakeholder management on steroids. It's really really hard, and you need to be really good at taking people with you, whether you're a head of digital or whether you're a CEO who wants to help your charity go digital, or a trustee who's driving your board forward in this area. And everyone needs support with that, because I think it's a really hidden unacknowledged area of what makes great digital change.

Sushi: Great.



Robyn: That was actually a question we had and you guys have nailed answering it. Because I imagine there will be people listening to this who are like; "I'm in the position where I should set into the role of being a digital leader – it's in my remit and I should do that". So, I suppose one of the key ways you're saying to do that is to get better, I suppose persuading people who are above you. But then if you're middle management, you've got to be good at upskilling the people who are below you in a way - does that make sense?

Brani: I think it's about standing in their shoes, because - digital leadership, my whole business idea, came out of the frustration of ten years, being part of digital leads groups, where we had events, went to the pub and then we whinged that management just doesn't get it. And I thought, after 10 years of management not getting it, this is just stupid - how can we help them get it? What can we do to help management get it? That's where I think the ideas around getting people to understand what the perspective of their manager is, what is happening in their life, why are they not hearing what you're saying, how can you help them gain trust in you really? That's another thing, sometimes with your approach you can look like a loose gun. And your manager doesn't really totally trust you. It's about developing that relationship and really helping them nail the objectives they have as well. And just walking in their shoes, that's what digital leads need to do really, when they think about managers, rather than just get frustrated.

Sushi: We've talked about this trust issue, trust is really the foundation that allows you to make the case. You say we're on a burning platform, we have to invest in digital - if you've got trust with your board, they will make the right decision to invest in the products you talk about. Even though that investment is probably going to be 10 years plus, before you see proper return on investment, which is also the other issue, and suppose the quick wins help to firm up the case. How do you see trust working with the senior stakeholders, the trustees - as a CEO, do you have to win the trust of your trustees? Win the trust of your trustees?!

[Laughter]

Sushi: Do you have to walk in their shoes as well? What is it that you need to be doing when you're a CEO or head of digital?

Zoe: I think that's a really interesting question, about the relationship with your board, as a CEO and how digital is changing that. We know the relationship between CEOs and boards is such a time consuming, labour intensive thing in the sector anyway. And I said it before, and I'll say it again, I don't think charity governance is always fit for purpose in the digital age. If you think about the main ways a CEO might interact with their trustees, the traditional thing of a quarterly meeting and email and all those kinds of things - just in



the same way that you need to get your charity and your staff working in a more digital, fast paced way where there'll be more certainty, you need to get your trustees comfortable with that as well. So that means communicating with them more regularly, telling the story about digital success, that will be those examples of digital change and of course, those quick wins. And if you haven't got a trustee on your board who really gets digital, for goodness sake, get someone on your board who really gets digital and skill up the rest of board as well, so they understand that everyone owns this, and they need to drive it.

Sushi: So, you'd say you're an advocate of digital trustees?

Zoe: Definitely, but I don't think it's just the case of parachuting someone who's got digital skills onto a board. You need to be a bit more considered. You need to think about what is the problem you're trying to solve here. There's no point getting someone onto the trustee board who is say brilliant at CRM, if you need a generalist. And you also need to make sure that the story doesn't end there. You have to make sure the rest of the board get that they all need to change and the rest of the charity needs to evolve as well. And I think a great example of that is Parkinson's UK, where you've got a chair who really gets digital, you've got a CEO who really gets digital and you've got a director of digital transformation, Julie Dodd, who's really really talented. You've got a holy trinity there, so think about the structure you've got on your board, but also overall throughout the charity, so you've got leaders who can all drive digital change.

Robyn: Absolutely. So, this changes tack a little bit, but would you say there is - I mean, we have charities of all sizes, I was literally talking to someone in the North West, at one of our events, who was on a team of three and I was like, "oh, in the comms team?" and she was like, "no... the whole thing".

[Laughter]

Robyn: Yeah, so we've got the huge range, so do you think there are differences? Any tips you would give to people who are on the smaller size? And whether it makes it harder or easier to be on a smaller team or maybe it doesn't work that way.

Zoe: I think smaller organisations need to work that to their advantage. Of course, if you're at Parkinson's UK or at Age UK you've got good sized budget, you've got a big digital team, yes, that gives you a lot to play with and you've got some great assets, but at the same time, if you're a smaller organisation, like the team of three you just mentioned, you're agile. You can make changes really really quickly, and you can decide where you want to go, and you can make that happen in what, six months? It's not going to take years like it does in other organisations. So, there's still lots of stuff you



can do. And having worked with plenty of larger and smaller organisations, the resources are different, but the process isn't. You still need to have that clarity about where you're going, develop a good strategy, and actually being small means you're going to be forced to cherry pick. I used to work for a small charity and we couldn't do anything without having a really strong business case and a really good reason to do it. And that's a great discipline.

Robyn: I was going to say, do you think it means the process of, "just going to give this a go" is a bit trickier, because you haven't got a large team where you can try something out, and if it doesn't work, it doesn't matter, you'll try something new.

Sushi: A space to fail

Robyn: Exactly, there isn't space to fail, that's a good way of putting it. Do you think that makes a difference, in terms of getting rid of that fear of trialing and erring with technology and digital?

Brani: I think agree with what you're saying, it's about the understanding of what you're trying to do is the first thing and this actually reminds me of that point when people saying, do you have a digital strategy? and digital strategy should be part of the organisation's strategy, blah blah. I actually don't think that's the case. The main thing is that if you do have a digital strategy, it needs to be absolutely rooted in the organisational strategy. And having the two separate in those terms is the wrong thing. That goes for however small/big you are.

Sushi: So, it sounds like, digital leadership is essential in most charities, but it's so essential in small organisations. You have to have people who are really aware of what they're doing with the resources that they've got.

Zoe: Yeah, there's nowhere to hide in a small charity. I used to work in a small charity and actually that's where I think boards have a really big role to play. Because they should be holding the charity to account on how fast its move forward with all this stuff. That goes for large organisations too, it's true. But absolutely, you need to use that level of scrutiny and that level of visibility within the organisation to your advantage in driving this all forward.

Robyn: Amazing - we were wondering if there was a meeting of minds, if there's a combination between these plans of attack...

Sushi: Plans of attack?!



Robyn: ...the attack is on championing and improving digital leadership within your organisation. There's a middle ground, where you're sort of working on bottom up and top down maybe?

Brani: Well you need both, for sure.

Sushi: In every organisation?

Brani: Well I suppose, that's an interesting question, because I remember when I was in-house, whenever you're trying to make the case for some investment, they're always asking "so what about others?", what are other organisations doing. And then the response you get is, yeah, but they are very different from us. So, there's this whole work you do about getting case studies of other organisations but then they want the specific thing for them, which makes sense because actually, while there are loads of similarities, there's loads of specifics in organisations that you have to take into account. But if I'm asked to do the general thing, then yes, you need to go top down and bottom up, because the two are very closely related. Because in order to develop digital leads, you need good managers, you need people who understand the change that's happening and can support it.

Zoe: You need to hit it from both angles, so I think the great advantage that a lot of comms people and also people rising through the ranks in digital at the moment is that they've got that grassroots experience. And they are at a point in their career where they can try stuff out. And then obviously, you need to get your board and your CEO and your leadership team very much supporting digital. So, you need a persuading and influencing strategy for both ends of the organisation - otherwise it's not going to work.

Brani: Yeah, a lot of the time it's about showing what other organisations are doing, so it's usually competitor organisations that you pick out and showcase what they're doing.

Zoe: I think benchmarks are really useful, so where you've got data, case studies from competitors like you were saying, I think that's great. And also, there's loads of data out there now, you know you guys at CharityComms have some really good reports, there's the Charity Digital Skills Report, there's the Lloyds index as well which clearly shows that charities who are using digital are going to save money, they're going to save time. Those on social media are going to be much better at fundraising, there's a lot of data out there now that you can use to build a really good business case.

Brani: But the bottom line is, there has to be some willingness to listen because there's no way you can make the case to someone who thinks it's all rubbish. So, this is where the trust thing comes in, you really have to work on trust for someone to give you the time of day to really hear what you're saying.



Actually, that's one of the things, I'd quote you on this Zoe, where Zoe was in one presentation saying send this information to people but also know when to stop.

Sushi: Yes.

Brani: Definitely, I know I've done this for sure and I've seen other people doing it, where you just bombard with more and more data and people just basically shut down.

Zoe: Absolutely, it's about that tenacity and being willing to make the argument, as it were, and to make the case for digital repeatedly but also in a way that's quite subtle. So it could be that it's as simple as; "Oh, I've just seen this article about this charity who did this great digital fundraising, I just thought I'd send it on to you". And you're not making the case and saying "I want an investment of £50k in digital fundraising now", you're just getting people to think and that's really powerful.

Sushi: There was also something else you said which was the idea of, letting other people think they've planted the seed - plant the seed let them grow the plant, or whatever the analogy was. That is interesting because there is something about, you get caught up when you have the enthusiasm you get a bit caught up in the kind of; "this is my baby and my thing and I need it to happen", but ultimately, it just happens - it happens, great!

[laughter]

Robyn: Amazing, well that was so, so interesting, thank you so much for joining us Zoe and Brani.

Brani: Thank you, it was a pleasure.

Zoe: Thank you, it was really interesting.

Robyn: I know! Honestly.

Brani: I think we should do the series of this because there's so much I could say [laughing] and it's not going away either!

Sushi: So what side of the debate do you fall on to? Do you need the grassroots advocates, who are pushing for digital transformation, or do you need a digital trustee and transformation from the top? Or, is it really both?



Robyn: I think, we've talking it over haven't we, and I think we both really land in the middle.

Sushi: Definitely land in the middle.

Robyn: A nice healthy dose of both! So if you'd like to check out slides from Zoe and Brani's talks at the Digital tools and channels conference, we've got them linked in the description box, so do go and check them out. You can get in touch with Sush and I, our contact details are on the About Us page of the CharityComms website, or you can hit me up on my Twitter, my @ handle is @robynlewes, spelt L-E-W-E-S and we've got episode 2 in the words at the moment. We're still interviewing but we're hoping to get it out to you soon so stay tuned. Thanks for listening, bye!

Sushi: Bye!

The CharityComms podcast is produced by Robyn Lewes and Sushi Juggapah.