Are You Actually Ready?

A two minute self-assessment before you shop for anything.

Check every statement that is true today. Not aspirationally true, not true once we hire someone. True today.

1 Organizational readiness. *Is the organization behind this, or just interested in it?*

- ☐ An executive sponsor understands that the real cost is switching cost and staff time, not the software license.
- ☐ There is a deadline that creates urgency without panic. A contract sunset, a board mandate, a season that has to be ready.
- ☐ Leadership agrees on what the system is for, beyond replacing what we have with something newer.
- ☐ The budget covers implementation and training, not only the subscription.
- ☐ Enough people agree the current state hurts that the change will not be fought.

2 Data readiness. *Readiness is not clean data. It is knowing where the landmines are.*

- ☐ We know how many systems hold constituent records, and someone can export from each one.
- ☐ We have an honest estimate of our duplicate problem rather than a hopeful one.
- ☐ A named person holds the institutional knowledge about why the data looks the way it does.
- ☐ We have decided what history actually matters to bring forward, and what does not.
- ☐ Nothing is currently freezing our data. No audit, no year-end close, no campaign in flight.

3 Team readiness. *The four roles that make it work, and the people who will live in it.*

- ☐ I can name the person who will be in the weeds daily, the strategist, the bridge to the rest of staff, and the executive sponsor.
- ☐ The daily users know this is coming and have been asked, not told.
- ☐ We have capacity outside our busiest season to do this properly.
- ☐ There is a final decision maker, and everyone knows who it is.
- ☐ We accept that year one is a new operating rhythm, not a finish line.

READING YOUR SCORE

13+ You are ready. Start the evaluation.

9–12 Ready with preparation. Fix the unchecked items first, because a vendor cannot fix them for you.

<9 Not yet. The gap is organizational, not technical, and buying a platform now will make it more expensive to close.

BEFORE YOU SHOP, NAME THE FRICTION

Look back at your process map. Technology friction is the only kind a new platform solves. Data, process, and ownership friction migrate with you, faithfully and at full price. **If most of your tags were D, P, or O, the work in front of you is not a purchase.**

TOTAL CHECKED _____

Scored yourself and did not love the answer?

Lake One helps nonprofits sort what is a system problem from what is not, before anyone signs anything.

ALL THREE TOOLS LIVE HERE

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