

# How to Write an Impact Statement

## What is an Impact Statement?

The very first critical step is to define why, for your particular organization at this particular time, a database is crucial to support the way you aspire to work and what you aspire to achieve.

***This message is your impact statement.***

An effective Impact Statement meets the following criteria:

- Relevant to your organization's mission (and so, relevant for all staff)
- Tied to your organizational priorities for the near-term (0-24 months)
  - Are you aiming to grow your team? Build a certain segment of your donor portfolio? Extend services to a new area?
  - The statement should clearly and directly connect to these priorities-- it's the touchstone you and your staff will return to again and again to get everyone on the same page about why it matters
- Tied to transparent, measurable indicators of success
  - Important to keep in mind: success, as you define it, should be achievable in the near-term

## Who to engage in writing the statement

- Executive leadership
- Heads of departments
- Team/person identified as responsible for the CRM (Executive Stakeholder)

## How to develop the Impact Statement

**To prepare to write your impact statement, consider the following:**

- What are your organization's top priorities (likely found in a strategic plan)?
- What are your top challenges (likely identified within a strategic planning process)?
- How might a high-functioning CRM address those priorities and challenges? What value would it provide your organization?
- How is the success of the CRM measured? How will you know if you're on track to creating the value outlined above?

## Writing the Impact Statement

**Considering the statement development questions above, draft your CRM impact statement:**

\_\_\_\_\_ [organization name] \_\_\_\_\_ aims to create/maintain a high-functioning CRM in order to  
\_\_\_\_\_ [define value CRM brings] \_\_\_\_\_, which supports our organizational goals to  
\_\_\_\_\_ [organizational priorities CRM can impact] \_\_\_\_\_.

### Example:

ABC institution requires a single, integrated system designed to bring greater **efficiency, reliability, control, and cohesion**. *(This is the mission)*

ABC senior management, program directors, and junior staff all share the common view that this transition is essential to **increasing productivity and information sharing** over the next decade. *(These are the priorities)*

*(These are the success measurements)*

1. Center-wide set of processes and training
2. Greater integration across programs
3. Eliminate redundant information and processes
4. Balance between openness/transparency of information

## Utilizing and communicating the Impact Statement

This Impact Statement should be communicated early and often to all team members engaged with the system. The Impact Statement is also used to guide important decisions related to investments in the system and how it should evolve.

**Consider the following as you use and communicate the Impact Statement:**

- When and to whom does the impact need to be communicated?
- How can you keep the impact statement front of mind going forward?
- How the Impact Statement should be used:
  - throughout the rest of this process?
  - during training and change management?
  - during roadmap management? And new enhancements?
  - to assess the status of the CRM initiative?

## Need help or strategic guidance around creating an Impact Statement?

If you or your organization would benefit from support around creating an impact statement or setting up a steering committee to guide technology initiatives, check out the [managed services page](#) on our website to learn more, and contact us at: [info@northpeak.com](mailto:info@northpeak.com) to get started.