Product Donations + Pro Bono Service Playbook

How to Create Effective Corporate Donation Programs

Taproot FOUNDATION

NETSUITE.org

We all know the story.

A donated product sits unopened in a nonprofit's janitor's closet. A social enterprise never actually goes live on their discounted software. A nonprofit uses 15% of a platform's functionality because they don't have the resources or know-how to fully understand it.

Discounted and donated products to social change organizations are increasingly popular. These donations can include software, hardware, subscriptions or platforms. TechSoup, a nonprofit that provides technology solutions, digital platforms and in-person experiences that support non-profits, public libraries and NGO's worldwide, saw double-digit percentage increases among both organizations served (117,197 in total) and donation requests processed (205,000 in total) in 2014. To date, TechSoup has partnered with over 100 companies and has generated over $5.5 billion in product savings to the nonprofit sector.

Isn't it all good then? Why do we even need a Product Donations + Pro Bono Service Playbook?

Recipients of product donations (typically nonprofits and social enterprises) are increasingly understanding that these donations cost money. While this money is not paid directly to the donor, recipients are paying for these products in staff time and consulting fees that are necessary to successfully use and adopt the donation. Since product donations are usually positioned as free, and sometimes even as a cure-all, organizations that don't properly plan for the donation end up struggling with unbudgeted expenses and unbudgeted time that turns into a distracting boondoggle for the organization.

On the donor side, product donation programs aren't meeting their goals either. Donors can't achieve their citizenship, brand or market development goals if no one is requesting or using their donations. All companies would agree that paid clients need training, customer service and implementation support. Why then do we not assume the same for product donation recipients? In the worst case scenario, some product donation programs can end up negatively affecting a company's brand or community reputation. Taproot Foundation and NetSuite.org see an opportunity to maximize the social impact of every product donation program and meet both the goals of the donor and the recipient. When social change organizations receive pro bono support in concert with their product donation, they can successfully implement and use donated products to achieve their mission. We aim to help companies better understand nonprofit customers and develop nonprofit customer strategies and support that ultimately generates high-impact product donations and services.

We developed the Product Donations + Pro Bono Service Playbook for companies interested in combining pro bono service—donated professional expertise from their employees—with a product donation program.

The purpose of this Playbook is to give you concrete steps to take as you develop your pro bono for product donation program. The Playbook outlines core tenets that will set your own program up for success, and weaves in case studies from NetSuite.org's own pro bono for product donation program to show real-life examples.

We hope you'll use this Playbook to guide your thinking as you structure and launch a pro bono for product donation offering at your company. It is our hope that the information contained within will help make your programs more strategic, meaningful and beneficial for your business, your employees and your community partners.

Taproot Foundation and NetSuite.org

We welcome your feedback, thoughts or any suggested additions to this Playbook.

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About

The Taproot Foundation connects nonprofits and social change organizations with passionate, skilled volunteers who share their expertise pro bono. Through their programs, business professionals deliver marketing, strategy, HR, and IT solutions that organizations need to achieve their missions.

NetSuite.org, the corporate citizenship arm of NetSuite, leverages its most valuable resources – its products and people, to accelerate the social impact of nonprofits and social enterprises around the world.

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A few notes to help you make the best use of this Playbook:

Our Case Study

NetSuite.org has graciously provided an insider's look at both their product donation and pro bono for product donation program. NetSuite.org's pro bono for product donation program utilizes employee talent to work collaboratively with "recipients" (NetSuite.org's term for organizations receiving a product donation) to take on a variety of pro bono projects all aimed at improving the organization's use of the software to build their organizational capacity.

Defining terms

- We've decided to use the term **"social change organization"** rather than charity or nonprofit in order to be more inclusive of the range of organizations doing good (ie nonprofits, social enterprises, BCorps, etc.)
- We use the term **"recipient"** to refer to the social change organization receiving the product donation.
- We use the term **"donor"** to refer to the company/ entity making the product donation.
- We use the terms **"product donation"** or **"donation program"** for simplicity purposes but it is meant to include product discounts as well. "Product donations and discounts" simply got too long...

The focus of this Playbook...

A company can have a product donation program without pro bono support. Similarly, you can have a pro bono program that is not connected to your product donations. These are, and can be, standalone programs at your company. The focus of this Playbook is how to strategically think about and unite your pro bono support with your donated products. Throughout the Playbook, we refer to this kind of unified program as "pro bono for product donations."

Are you ready to start?

So you want to offer pro bono service coupled with your product donations. **Pro bono for product donations will be the most advantageous for your recipients, and to your business, if you do the work in advance to be sure you're ready to take it on.** We'll help you determine whether you are ready for a pro bono for product donation program.

Following are the five steps you can take to determine whether you have the right resources, information and structure in place to launch pro bono for product donations.

Step 0:
Do you have a clearly defined product donation offering?

We know this sounds basic. But we're not asking simply if you give away or discount your product. We're asking whether you have a clearly defined product donation offering and if you've thought about how that offering helps social change organizations (don't assume everyone will know or understand how to use your product just because you're donating it!). Pro bono service is more valuable when it is coupled with an existing, viable product donation strategy.

Here are some questions you can ask to understand your own donation offering:

Do you have a market focus?
This means who is the target recipient of your donation, where are they located and what are the necessary qualifications for donation. Recipients could include nonprofits, social enterprises, BCorps or a combination. Geographic locations could be domestic or global. Qualifications can relate to organizations you may exclude from donation (common ineligible recipients are individuals and political or religious organizations).

Do you have a market segmentation?
This refers to how your discount or donation is structured. Examples could include a percentage discount scaled to a social change organization's annual revenue. This structure will likely differ based on the organization type (ie charitable organization vs social enterprise).

Do you have a specific product offering?
This means which products or levels of product will be made available to your recipients. Examples could include single products, product suites, or additional add-ons.

Have you validated how your product would be helpful to social change organizations?
Don't assume! It's worth doing the work to determine the reality of what your product would look like being used by these organizations. It may be identical to how your current customers use your product, or you could be surprised at the different business environment and needs.

The simplest way to clearly define your product donation program is to copy your company's business model. Write down every step in the value chain for your commercial operations including development, distribution, support, end-of-life, etc. Strategically think about which steps in the value chain can be eliminated and which steps can be achieved with alternative, lower cost approaches. Once the "product donation business model" is on paper, you can easily understand the ROI for the program.

Case Study:

SuiteVolunteers is NetSuite.org's pro bono program that connects NetSuite employee talent with recipients (product donation recipients). Prior to launching SuiteVolunteers, NetSuite.org had:

→ A market focus on both nonprofit and social enterprise organizations. They wanted to be inclusive and help a broad range of organizations doing good worldwide.

→ A market segmentation within both the charitable organization and social enterprise sections. In NetSuite.org's case, the amount of the deduction is initially tied to the annual revenue of the organization.

→ A defined product offering including a "base donation" (a complete solution for an organization to achieve their goals) and "additional items donation" (add-ons, additional users and associated support). NetSuite.org defines a base

and additional donation for every technology, including acquired products, regardless of whether NetSuite.org anticipates donating those products. These donations have changed over time according to the evolution of the business, the evolution of the product line and how non-profits use the software. Base donations ensure the program meets the philanthropic purpose by providing a complete solution at no cost, but it also creates an opportunity to build revenue streams when recipients seek solutions beyond the base donation.

Step 1:
Does your product need pro bono support?

You know your product. But how well do you know how social change organizations understand and use your product? Not surprisingly, this step takes research. It means talking to social change organization users and digging into their product experience. You'd never create a product enhancement or development without customer feedback, so don't create a pro bono for product donation program without customer feedback either.

During this stage, you may want to ask yourself:

Are social change organizations (ie nonprofits, social enterprises, BCorps) already using your product or other technologies? What are their challenges and successes?

How easy is it for social change organizations to adopt your product? Is there a large percentage of organizations acquiring, but not actually using the product?

Where are social change organizations encountering barriers or pain points in using the product? What is holding these organizations back from using your product to the fullest potential?

Who is the primary user of your product at a social change organization? Quite often you'll find that there is a different user profile at these organizations compared to your standard customer.

Gathering customer feedback doesn't have to be hard. It can be as easy as picking a few organizations and having a one-hour conversation with each on the phone. Often the major insights will be obvious from just talking to a couple recipients.

Case Study:

NetSuite.org continues to focus on understanding how social change organizations use their donated product. This is an on-going process for the company. Here are some examples of how they continue to learn about their customers' needs:

→ **Formal recipient survey:**
NetSuite.org conducts a yearly product donation recipient survey to continually reassess its donation program and better understand how the technology is being used to further the social impact of product donation recipients.

→ **Account management for nonprofits:**
NetSuite.org provides a dedicated account manager to every product donation recipient. The account manager delivers welcome sessions and shares best practices, answers product donation recipient inquiries and provides ongoing customer service.

→ **Capacity Assessment:**
On an on-going basis, NetSuite measures the capacity of all product donation recipients to effectively use the software. Using its customized maturity model, every product donation recipient is scored three times in year one and yearly after. The scoring measures the technology capacity of the recipient, its ability to succeed on NetSuite technologies, as well as their happiness on the platform. Their overall mission is to lead the product donation recipient through a life cycle where NetSuite.org technologies enable them to further their mission.

Step 2:
Have you defined success for your pro bono for product donation program?

Clearly outlining what you hope to achieve with your pro bono for product donation program will help guide your program's design. Determining what your goals are from both a social impact and business benefit perspective, can ensure that you create a program that meets all of your objectives.

Here are two categories you'll want to explore as you think about the success of pro bono for product donations programs:

Your Social Impact
How do you envision that your pro bono for product donation program will benefit both your product recipients as organizations and the greater community? When thinking about the recipient organizations for instance, your program may focus on building their organizational capacity to better deliver their services. This may mean that you want to see the organizations you work with more effectively use your solution to achieve their mission. Or that you want to see a marked change in efficiency for these organizations as a result of using your product more fully. When thinking about how your program affects the greater community, you can consider what are the social issues that you may focus on for instance. This may not be relevant to every company, and you may determine that you want to address all social issues. Or you may have a signature issue, such as homelessness, food security or inclusive entrepreneurship and you'd like your pro bono for product donation program to focus specifically on supporting those organizations who address that issue.

The Benefit to your Business
This relates to how you envision that your pro bono for product donation program will benefit your business. There are a myriad of reasons why pro bono service is good for business. Likely, you'll want to consider how this program can benefit your employees. Some examples of goals for business impact, can be to better retain and develop key personnel (such as high potentials) within your company. Or your program may be a globally available offering in order to build cross-country camaraderie and culture. Or your program may include team projects across business units because you're looking to build employees' comfort working across departments. Knowing some of your business goals and identifying how your program may help you reach those goals will make your program a win-win for both your recipient partners and your company.

Case Study:

NetSuite.org outlined clear goals from the beginning of their pro bono program.

For social impact, they were focused on ensuring that their recipients better adopted and used their solution with the pro bono support, and that this support increased the organization's ability to deliver its services. In order words, they focused on building organizational capacity for their partners. For this goal, it also meant they wanted to have a program that could provide pro bono support to a growing number of recipients. Next, they looked at their employees and wanted to create a program that was inclusive of employees globally. They purposefully designed a program that would build a sense of company cohesion and connectedness among their disbursed employee base. Getting a sense of both their social impact and business goals allowed NetSuite.org to design a responsive pro bono for product donation program.

Step 3:
Do you have internal buy-in around pro bono for product donations?

Never underestimate the power of internal buy-in. Building advocates, champions and advisors across your business will go a long way to building a pro bono for product donation program that lasts.

Here are suggestions as you consider your own level of buy-in:

What do your corporate executives already know and believe about pro bono service?
Are they aware of the business benefits of pro bono as a skill-development and product knowledge building strategy? This can help you gauge how heavy your "lift" will be to internally sell the value of pro bono at large, and particularly to your product donation offering, to your C-Suite.

Is pro bono happening ad hoc at your company already? This will help you gauge how heavy your "lift" will be to internally recruit employees to participate in a program.

Are there opportunities where you can pitch pro bono as a solution for an existing internal challenge? For example, is your HR team looking for more professional development opportunities to offer to employees?

An easy way to build buy-in is to give your colleagues a chance to be an early thought-partner or contributor to the design of your pro bono for product donation program. Through stakeholder interviews, focus groups or even just conversations, purposefully asking for their feedback and insights not only allows you to build a stronger program, but gives them a sense of ownership and accountability for the program as well.

Case Study:

NetSuite.org worked to build both executive and employee buy-in before launching a program. Here is how they did it:

At the executive level:

→ **Take it on the road:**
In 2012, NetSuite.org presented to every C-level executive on pro bono and the early plans for the pro bono for product donation program. The roadshow both socialized the concept and introduced the business value of the program. It also provided opportunities to understand the potential obstacles for employees to participate, which then were addressed in the final program plan.

→ **Extend Ownership of the Program:**
In 2012, NetSuite.org developed their Pro bono Advisory Council (featuring a senior representative from each large department in the company). This Council provided early advice on defining pro bono projects and continues to advise the NetSuite.org team and promote the program to their teams.

At the employee level:

→ **Make it personal**
(and professional):
NetSuite.org talked to employees who had engaged in ad hoc pro bono projects to understand their own personal and professional gains. The NetSuite.org team highlighted these benefits in recruitment materials and internal communications about the program.

Step 4:
Are resources available for pro bono for product donation at your company?

We all wish that pro bono for product donations just happened. But it doesn't. It takes both financial and personnel resources. Be realistic and realize that like anything within your business, you are going to need to continually invest in this to make it work. Understanding your own available resources can help you gauge whether you have what it takes to set this up for success.

When thinking about resources, consider:

Do you have personnel dedicated to your product donation and pro bono for product donation program? These are individuals whose responsibilities specifically include the management and accountability of these programs. This is not a volunteer's job or a 10% project for an employee. You will need people-power to design and run a pro bono for product donation program.

Do these employees have the bandwidth to take on a pro bono offering? Capacity is reality. If you have one person responsible for employee engagement, your Global Week of Giving, your volunteer programs, your grantmaking and your product donations, this person may be stretched thin already. Consider whether this person can feasibly and responsibly take a pro bono program on.

Do you have the financial resources to hire outside resources or consultants if needed? If you realize you're stretched thin, can you call in an expert? There are intermediaries and organizations (like Taproot) who are experts in managing and running pro bono programs. Whether you're a DIY kind of company, or a chronic-consultant hiring kind of company, consider the value in bringing in an outside expert. The money spent can save you headaches and wasted time.

As you walk through these questions, you'll get a sense of whether you have the right resources, structure and information that can serve as a launching pad for your pro bono for product donation program. This may take time and you'll likely need to focus on building this groundwork first. If you already have this groundwork in place, read on for the 3 tenets you need to know to make pro bono for product donations work.

Case Study:

We'll talk in much more depth about how NetSuite.org invested in their pro bono for product donation program later, but for now we'll say that their structure has dedicated staff, budget and bandwidth that make it work.

Congrats!

You've determined that you have a thriving product donation program and that you are ready to combine it with pro bono support. **With strategic design, and appropriate investments, pro bono service for product donations can be a powerful combination that supports your recipients' use and adoption of your solution.**

The following pages contain guiding questions and suggested recommendations for designing and launching your pro bono for product donation program.

Three Tenets to Guide Your Program Design

Consider these tenets your guiding principles to a successful pro bono for product donations program.

1.
Follow the Business
Your pro bono for product donation programs should closely follow the overall goals and processes of the business.

2.
Make the Investment
Your pro bono for product donation program requires a level of investment across staff & personnel, budget and infrastructure.

3.
Structure the Offering
Your pro bono for product donation program will need to be designed to easily engage both volunteers and recipients and to ensure successful outcomes.

Tenet #1: Follow the business

Corporate programs for social good are not side-projects. They are core to how your customers, employees and community partners interact with and perceive your business. "Follow the business" simply means treat this initiative with the same amount of rigor and diligence that you would any other aspect of your company.

Why "follow the business"?

Maintain quality: Using the same set of standards or rigor as the business expects helps you establish the program's reputability internally and also encourages a level of accountability and quality of the program itself.

Ensure sustainability: Your program is a part of the business. How the business is doing, or urgent priorities and strategies, will all directly affect your program. Remaining connected to your business helps you stay on course and be responsive which ultimately enables your program to continue to exist and thrive.

Make your life easier: Why swim upstream? Again, the intention is not to create a totally separate, disconnected program. Adapting business processes or resources to fit your needs will save you time and aggravation. It's too easy to treat a social impact program as the black sheep at a company. If you continually show how you are similar, rather than dissimilar to the business, you'll be met with less resistance.

When you need to lead...
There are times you can't follow the business, simply because there isn't a precedent. For example, there likely isn't precedent for qualifying for tax deductions. If you do need to create a new process or go down a new path, just ensure that you do it with the same level of focus, resources and quality that you'd run any other area of your company. Do your due diligence. Understand how other company's approach this process and think about best practices you can reference when you make your case.

Case Study:

Let's look at real-world examples of "following the business" at NetSuite.org.

→ **Don't build from scratch:**
In the early days of their product donation program, NetSuite.org had to meet with the legal and finance teams to take care of operations such as legal agreements or financial implications of the program. Rather than establishing an entirely new structure including procedures, contract terms, agreements, etc. for the product donation program, the teams decided to simply set the skew price for a product to $0. NetSuite.org could now donate products, and do it all within the same bounds and processes the business already used.

→ **Adopt existing business offerings over time:**
NetSuite.org knew their recipients needed access to more training materials. However, it was a complicated process to get recipients' access to the existing classes and materials at NetSuite. Rather than create an entirely new process, NetSuite.org waited until the business rolled out an annual training subscription pass. NetSuite.org adopted the pass for their product beneficiaries, which meant the infrastructure was already set up within NetSuite for these trainings, and they could easily plug social change organizations into it.

→ **Treat it with rigor:**
NetSuite.org's pro bono for project donations program is held to the same standards as any business operation. They hold monthly meetings with C-Suite Executives where they set priorities, report on progress and adjust course as necessary. This meeting is an example of the accountability and focus it places on the pro bono for product donation program. In other words, NetSuite.org has created a set of metrics and are holding themselves accountable to them.

→ **Make appropriate asks at the appropriate time:**
Following the business also means you know what resources are available, and likely, could be applied to your program. You will be able to ask for resources that are doable within the current environment of your company and will be likely to be approved. Timing is often everything. Look at what is happening in the business and make asks at the right times to face less of an uphill climb. For instance, NetSuite.org has Professional Services (consulting) employees whose hours are billed to customers. If they are doing pro bono, they aren't charging hours. NetSuite.org was able to show that the degradation to the business would only be 1%. Executives were comfortable with this figure and agreed to that being a cost born by the business for the program. For employees who bill hours, participating in pro bono would decrease their billable time. To ensure that these employees weren't penalized for participation, the NetSuite.org team became a "customer" that the employee billed. This structure allowed these employees to participate in pro bono without any negative consequences.

Tenet #2: Make the investment

Consider how companies launch a new business line or product. This should all hold true for pro bono for product donation programs as well. There are research & discovery phases, there are analyses of costs and benefits, and there is a baseline investment of capital and personnel that grows with success.

What does an adequate investment in pro bono for product donation look like?

Research & discovery: Don't underestimate the power of knowledge as you are designing your pro bono for product donation program. Spend time to understand the core variables that are going to make a pro bono for product donation program work. Here are some ways to start:

➜ **Conduct informal interviews** with your employees to understand how likely they are to participate in pro bono, their realistic time commitments and how they'd like to engage (virtually? individually? short or long-term?).

➜ **Hold focus groups** with your recipients to understand their interest in pro bono and their own technical capacity.

➜ **Converse with business unit leads about their department's core areas of professional expertise** and any timing constraints or good/bad times of the year (for example, is there a release every April that makes your product team unavailable for February and March?)

➜ **Audit your own internal communication and remote connectivity solutions** to understand how they can be used for employee recruitment and project management.

Staffing & Personnel: You are going to need people to run a pro bono for product donation program. The amount of staff may change based on your intentions around size and scale. Here are some suggested roles for the individuals who will be key to your pro bono for product donation program:

➜ **Program managers:** These are individual(s) who will manage the entire program. In NetSuite.org's case they divide up management of the Product Donation team and the Pro bono team – but everyone works collaboratively. These people are responsible for the overall success of the program, and manage every detail of its implementation from recruitment to evaluation. These people are also often the "face" of the pro bono for product donations program at your company and represent and promote the program both internally and externally.

➜ **Team Leaders or Project Managers:** These are volunteers who will lead each pro bono team. It's important to establish a person to play this role, just as it would for any project you take on.

➜ **Advisory roles:** These are your subject matter experts. Advisors main responsibilities are to provide key insights or feedback to program management staff. These advisors should also be expected to advocate for the pro bono program internally among their team and colleagues.

Budget:

➜ **For your product donation program:** So many product donation programs are started under-resourced. While the costs associated with launching a product donation program may not be the same as launching a new product there are costs associated to support marketing, creation of custom materials, delivery of the product (for example, will you need to pay for the cost of server space?), etc. Assuming that a product donation program will cost the company zero dollars is setting yourself up for failure.

➜ **For your pro bono for product donation program:** As long as you have staffing well handled, the pro bono side of your program can be managed on a shoe-string budget. Consider the internal marketing needs you'll have (how will you promote this program?), a database/volunteer management system and employee recognition/incentives as elements you might want to put budget towards.

Don't know what to ask during a focus group with your nonprofit users?

Where are they seeing challenges?
Understanding frequent needs of the recipients using your product donation will help you identify where the needs are that you could apply pro bono resources to.

How much do they understand pro bono?
Understand whether the recipients know the difference, and know how to utilize, traditional volunteers vs pro bono volunteers vs consultants. Be clear about what pro bono support you're intending to provide.

What is technical capacity?
An organization receiving your donation should have the necessary resources internally or have a plan to implement the solution. Otherwise, the product will remain unused, or will cost the organization to spend unplanned resources to use. Determining an organization's capacity to accept and use your product can and should be part of your product donation application.

Products are sold. Customers need support. These somehow get overlooked or convoluted when it comes to discounted or donated products. Read on for ways to structure your product donation sales team so that you can properly incentivize staff and meet customer needs.

<u>Case Study:</u>

NetSuite.org's pro bono for product donation program has grown and matured into its current iteration over 10 years. Here is a snapshot of the unique investments NetSuite.org makes particularly in the research & discovery and the staffing & personnel bucket in their pro bono for product donation program:

Research & Discovery

NetSuite.org focuses on use of the product among their donation recipients. They have learned that an organization needs a baseline technical capacity in order to successfully adopt the product. NetSuite.org has created a capacity assessment model and process for potential recipients. This model weighs things like the organization's technical knowledge, personnel resources and financial health in order to help NetSuite.org determine the likelihood of success for the donation.

Staffing & Personnel

Pro bono for Product Donation Program

Program management:

NetSuite.org has five people on the Corporate Citizenship team.

One program manager leads the pro bono program, and spends roughly 70% of their time managing this program.

Two additional program managers assist by serving as Project Managers overseeing a number of quarterly projects, using approximately 15% of their time to support the program.

Advisory roles:

NetSuite.org created and convenes a group of 10 Director-level advisors. These Advisors helped draft the scopes for the original pro bono projects when the program was starting. They continue to provide feedback annually on what projects will be offered to recipients. Advisors also provided early feedback about when their teams were available to engage and continue to promote the program to their department.

Product Donation Program

Sales & Support:
Product donations don't lend themselves to traditional sales processes like quotas or commissions. NetSuite.org has created a sales structure that provides employee incentive and ensures that social organizations are set up for success. This structure includes:

Social Impact Account Executives (5 total): Responsible for prospecting new recipients in defined geographic territories. Uniquely, these individuals are not driven by sales quota and have a base salary.

Social Impact Solution Consultant (1 total): Responsible for doing demos to prospect organizations and sales consultations with social change organizations.

Grant Administrator (1 total): Responsible for the due diligence and review of all grant agreements for the organization receiving the donation.

Account Manager (6 total): Responsible as the point of contact for the recipient and accountable for the recipient's use and adoption of the product. Their success is measured by renewal rates and recipient use.

Recipient Impact Customer Success Specialist (1 total): Responsible for understanding and building success in the donation recipient customer base.

Tenet #3: Structure your offering

There are a variety of ways pro bono for product donation programs can be designed. The key is designing a program that works for your company, your employees and your product recipients. There are however common components to any pro bono offering. As you are launching your own pro bono for product donation offering, here are some common considerations:

What are your size and scale goals?
Are you designing this program to serve 100 recipients a year? To serve domestic recipients only or global organizations as well? Alternatively, are you successful if you only serve a small number of organizations per year? Be realistic about the size and scale of your program, so you can structure it accordingly.

How will volunteers get involved?
Determine how your volunteers will do pro bono. People can volunteer individually or in teams for instance. They can volunteer in a time-bound event, short cycles of help or in longer-term projects. Advisory Committees could have annual commitments or 1-2 requests per year. How you ultimately design how volunteers get involved could depend on a few factors:

➜ **How is work done at your company?**
If you have a culture of team-based approaches to client work or problem solving, you may consider the team model for instance. If you have a largely disbursed, global workforce, you may consider virtual engagements.

➜ **What is a feasible, realistic commitment?**
Consider how many hours or days your volunteer time-off policy includes (if any). Consider the business cycles and times of year that are the busiest at your organization. Consider any other upcoming business changes (mergers? hiring? lay-offs?) that may affect how much your employees will be able to participate.

How will the pro bono service be delivered?
This relates to how and when the volunteer and social change organization work together. Pro bono can be delivered in a predictable, predetermined cycle throughout the year. Or pro bono can be ongoing and social organizations can apply at any time. Pro bono projects can happen locally with an emphasis on face-to-face encounters, or can be delivered completely remotely. How you ultimately design how pro bono service will be delivered could depend on a few factors:

➜ **What is your program management bandwidth or expectations?** Ongoing opportunities require an ongoing management of details and therefore greater bandwidth.

➜ **What does your employee to social change organization balance look like?** This relates to where your employees and partners are located. If you have a large population of employees in North America, but the greatest concentration of recipients are in Europe, you'll likely want to consider virtual pro bono. Even with virtual teams, consider time zones – how will the employees and the recipient meet if they are never working during the same time period?

➜ **What is your corporate culture?**
What is likely to be adopted and enjoyed at your company? Do employees need face-to-face encounters? Do they like high visibility events that bring together diverse teams? Do they enjoy smaller team-building formats or individual opportunities to engage? All of this information can help you determine how to structure the delivery of pro bono.

What is NOT good for pro bono?
Consider whether the pro bono will be additive and appropriate for the organization or whether it's merely a stop-gap for a service or investment the organization needs to make. There are times when something is so critical to an organization's successful use or adoption of a product, that sometimes it should be paid for.

Still not sure which expertise is best used for pro bono service?

For a company, pro bono should really mean donating the professional services that you employ a person for. You may have a product engineer who is an excellent photographer, but if you don't employ them for photography, you shouldn't donate their photography skills pro bono. Similarly, while pro bono is a learning opportunity and training opportunity, it's imperative that the team include experts.

Case Study:

NetSuite.org has donated or discounted their product to over 850 social change organizations worldwide. Of those, over 300 have received pro bono service in addition to their donation. Nearly 1,000 NetSuite.org employees have volunteered their expertise to empower these organizations to optimize the donation. Behind these figures is the strategically designed pro bono for product donation program that makes it work. Here's an at-a-glance look at what constitutes NetSuite.org's SuiteVolunteers:

Who:
Nonprofit and Social Enterprises who receive NetSuite.org product donations (aka Recipients) NetSuite employees (aka SuiteVolunteers)

What:
Teams of SuiteVolunteers work collaboratively with donation recipients to take on a variety of projects all built around improving the organization's use of the software, and building their capacity.

Where:
Pro bono projects are completed virtually.

When:
Pro bono projects are completed in 20 hours per volunteer (on teams, meaning a typical project is 40-60 total hours) over the course of a quarter (only offered Q1, Q2 and Q3).

How:

Step 1:
Recipients and volunteers complete online applications indicating what they need help with, or for volunteers, what they can provide assistance with.

➔ Recipients can apply for up to 3 projects within a quarter. They provide information about both their challenge and how they are hoping to overcome it.

➔ SuiteVolunteers apply each quarter indicating their interest, expertise and manager approval.

Step 2:
NetSuite.org program management team reviews and scores each application. Highest scoring applications are matched with qualified employee teams (the match takes into account location/time zone, skills/need, as well as a variety of NetSuite.org specific matching factors that have been built in to support department goals of professional development, etc.). Finally each team is assigned a project manager from the volunteer pool.

Step 3:
SuiteVolunteers and recipients are notified if they have been accepted into the program and are provided an orientation (NetSuite.org runs 3 orientations each quarter, volunteer, project manager and recipient).

Step 4:
NetSuite.org program managers introduce SuiteVolunteers to Recipients and teams kick-off their engagements.

Step 5:
SuiteVolunteers create the final scope for the project and timeline. All parties agree to the timeline and deliverables.

Step 6:
Projects are executed and successfully completed! (This is typically over 8 weeks).

Step 7:
NetSuite.org completes project evaluations with both SuiteVolunteers and Recipients to understand project outcomes, impact and possible future program modifications. Employees track total volunteer hours.

From a timing perspective, once Step 7 happens, the next quarter's Step 1 has already kicked off.

NetSuite.org's pro bono for product donation model works for their company, their employees and their product recipients. Your own program may look similar, or completely different. The key is designing a program that advances your product donation strategy, aligns with your employee expectations and corporate culture, and addresses the unique needs of your product donation recipients.

Things can go awry...

You will likely encounter barriers or challenges in your pro bono for product donations program. Consider them your chance to reassess your program as you create the most responsive and impactful offering.

Common barriers to successful pro bono for product donation programs and how to overcome them.

Your pro bono for product donation program will never be perfect.

Your business and the world evolves. Your pro bono for product donation program should, too. Encountering barriers is common, and you can be prepared and ready for what may come.

Here are some examples of NetSuite.org's early challenges with their pro bono for product donations program and how they overcame them:

Setting It Up:
NetSuite.org knew they wanted to offer pro bono behind product donations, and knew they needed employee volunteers to do it. What they didn't know was whether employees could commit the time or whether it would negatively impact their day-jobs.

How they overcame the challenge:

NetSuite.org program staff asked Advisory Council members to give them a sense of team schedules and availability throughout the year. With this information, NetSuite.org program staff knew which teams were more likely to be available and when.

NetSuite.org had executive approval for employees to use up to 20 hours of business time each time they took on a pro bono project. They ensured this approval was socialized each time they discussed the program so that everyone was clear on scope.

NetSuite.org wanted to set clear expectations and deliverables upfront with recipients and volunteers. To do this, they developed a list of core

projects that could fit into the time allotted, would be beneficial to a large number of organizations, and had a large number of employees who could fulfill them. This list was then shared with the advisory team who helped to tweak it into the published list. Each year this list is reviewed and re-assessed.

Getting People Onboard:
If you build it, they don't always come. NetSuite.org realized they had to focus on educating both volunteers and social change organizations about the program, and making the entire engagement process (from application to evaluation) as seamless and user-friendly as possible.

How they overcame the challenge:

Emphasize your program staff team's support:
NetSuite.org focused on helping employees understand that they had the skills to take on these projects and that they were supported by the NetSuite.org team. NetSuite.org created, and stuck to, feedback loops and ongoing evaluation to make sure volunteers felt supported along the way.

Make it easy to get involved:
Once the volunteer is interested, signing-up should be simple. Everything from creating a clear, easy-to-use application process to instituting (and enforcing) time-bound projects has ensured that SuiteVolunteers get, and stay, involved in the pro bono projects.

Recruiting employees can be tough. Here are some ways NetSuite.org recruits SuiteVolunteers.

→ Specific sign-up windows are publicized throughout the year coupled with a communication and marketing campaign.

→ Advisory Council members make targeted asks to their teams.

→ All new employees learn about the program during their New Hire Orientation and then again through a personal welcome email from NetSuite.org staff at their 90 day mark.

→ NetSuite.org asks alumni volunteers to help with recruitment.

→ Employees are incentivized to nominate their peers with things like raffle contests.

→ NetSuite.org has created a compelling video for employees on how the program works.

→ Information about the program is available on social media and the company's intranet.

→ Team and department leads are asked about what pro bono service could do for their team and encouraged to help spread the word.

Sometimes your original hypothesis is incorrect.

After some early test projects at NetSuite.org, they learned a few things. Rather than stay the course, NetSuite.org adjusted and responded to what was, and wasn't, working.

Here's what they learned and how they adjusted:

Individuals had a higher failure rate than teams: "Single point of failure" was real for NetSuite.org's pro bono program, especially before the program was formalized. A single person might have too much on their plate to manage the entire project alone. A team approach has helped NetSuite.org make sure that unforeseen employee responsibilities or turnover won't negatively impact the project timeline or deliverables.

The balance of employees to social change organizations may be skewed. NetSuite.org found that 75% of their nonprofits were based in North America, but only 50% of their employees were. The team was concerned that language and time zones may be barriers to getting the projects done. NetSuite.org found that language and virtual connectivity was not typically problem, but time zones did matter. Now, all project volunteers are matched as closely as possible based on time zones since scheduling is often a barrier to successful pro bono service.

Social change organizations want help with the software. In the beginning, NetSuite.org offered pro bono projects that weren't directly related to helping recipients better use the software donation. What they quickly realized however, is that when recipients had the opportunity to talk to a NetSuite employee, they almost always wanted to talk about their use of NetSuite. Following this realization, NetSuite.org shifted the program so that all projects focused on helping recipients better use their software donation.

...and if NetSuite.org could do it again?

We all want a "do-over" sometimes. If NetSuite.org could set up their pro bono for product donation program again, what would they do differently? They'd have built in additional "interventions" for recipients so that pro bono wasn't seen as a one-time service. NetSuite.org wants each pro bono engagement to incrementally build the recipients' product knowledge and capacity rather than having it be a "one-and-done" support service. The team has also made considerable tweaks to how their process runs, from improving the database that collects the nonprofit applications, to streamlining communications and manual processes, to even changing the tenor and purpose of the orientations. No one has a crystal ball, and setting up the "perfect" pro bono for product donation program right out of the gate is unlikely for any company. Iteration and adaptation will be key as you learn and improve!

Why it's worth it

Your pro bono for product donation program helps organizations all over the world take on our biggest social challenges. Product donations and pro bono support can help these organizations reach their optimal efficiency and scale.

When organizations operate better, they can focus more time and effort on solving social challenges.

Pro bono for product donation programs help organizations operate more effectively.

This simply means these organizations can function better. Whether the organization promotes the development of **future leaders through education and adventure,** is providing **healthcare and care management to low-income individuals in New York** or is improving the well-being of individuals in Bangalore and Cochin, India through the practice of Ayurveda, a traditional medicine of India, all organizations are better equipped to serve their mission when they operate most effectively.

Here are a few examples of how pro bono and product donations can help organizations operate better:

→ The organization converts manual processes to automated ones saving staff time and resources.

→ The organization more accurately tracks and distributes inventory reducing errors.

→ The organization creates marketing content and processes that help cultivate donor and constituent relationships.

And the list goes on and on...

Talking about increased efficiency is not earth-shattering. But for Brightpoint, whose credit card reconciliation process previously took 3-4 days to complete and now with the use of NetSuite.org and NetSuite.org's pro bono volunteers they were able to reduce it to 10-20 minutes, increased efficiency can be game-changing. With the increased time and resources, Brightpoint is able to now serve the healthcare needs of over 40,000 New Yorkers per year.

Still not convinced? Here's another example from NetSuite.org and the SuiteVolunteers program of why building more efficient organizations matters.

Case Study:

NetSuite.org supports AyurVAID Hospitals, a chain of NABH accredited hospitals in Bangalore and Cochin that practices Ayurveda, the traditional medicine of India, at the standard of rigor of leading modern hospitals.

AyurVAID aims to treat the root causes of chronic diseases. A crucial tenet of their medical practices is to maintain close relationships with their patients over the long term and provide treatments focused on diet, lifestyle and therapy. The hospitals knew they had to focus on patient relationships rather than transactions. Customer relationship management had to be core to the hospital's success and operations.

To do this well, AyurVAID needed to track the patient lifecycle from admittance to ongoing care. SuiteVolunteers helped AyurVAID create patient communications and an outbound market strategy. The volunteers created templates, marketing automation processes, campaign records and reports within NetSuite. They customized dashboards, forms and alerts that helped the AyurVAID team keep up with and better manage patient check-ins. The resulting deliverables and advice from the SuiteVolunteers allowed AyurVAID to fully utilize NetSuite.org software for in-patient management and communications. Following the success of this initial project, AyurVAID then engaged SuiteVolunteers to set up an automatic integration of forms and workflows to transfer patient information between all of their hospital centers. The ability to seamlessly transfer patient information has enabled doctors to focus on building patient relationship rather than transactions, and deliver better care.

Your Turn

Pro bono service is a powerful way to ensure that your nonprofit and social change customers fully utilize your product donation or discount.

It is also an invaluable experience for both your employees and your product recipients.

We encourage you to now take action! Here's what you can do next:

→ Use the readiness assessment guide to make sure you have the right resources, information and structure in place to launch a pro bono for product donation program. (p. 5-9)

→ Walk through each tenet, answer the prompt questions, and design your program. (p. 12-15)

→ Read each case study along the way for both encouragement and inspiration.

We hope you found this Playbook to be useful as you think about how to structure and launch a pro bono for product donation offering at your company.

Thank you for reading and we'll look forward to featuring your corporate program and story in future editions of the Playbook.

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