

90-Day Technology Checklist for New Nonprofits

Your Guide to Building a Solid Technology Foundation



www.missiontechadvisors.com

How to Use This Checklist

Congratulations on starting your nonprofit! This checklist will guide you through setting up essential technology in your first 90 days.

Important Notes:

- Complete tasks in order when possible—later tasks build on earlier ones
- Most tools listed are FREE or heavily discounted for nonprofits
- Don't skip the nonprofit discount applications—they save thousands
- Each section has space for notes and account information
- Keep this checklist and update it as you complete tasks

Time Commitment: Plan for 2-4 hours per week for technology setup

Budget: Most items are free; budget \$100-300 for optional paid upgrades

WEEK 1-2: Communication & Collaboration (Days 1-14)

Email & Workspace Setup (Days 1-3)

- **Apply for Google Workspace (FREE for nonprofits)**

Visit: google.com/nonprofits

Expected approval: 1-2 weeks

- **Purchase domain name (if you don't have one)**

Recommended: yourorganization.org (~\$12-15/year)

- **Set up custom email (yourname@yourorganization.org)**

- **Create shared drives in Google Drive**

Folders: Board Documents, Fundraising, Programs, Finance, Marketing

- **Set up Google Calendar for organization**

Notes:

Team Communication (Days 4-7)

- **Create Slack workspace**

- **Apply for Slack for Nonprofits discount (FREE for teams under 250)**

- **Set up essential Slack channels**

Channels: #general, #fundraising, #programs, #questions

- **Invite team members to Slack**

- **Connect Slack integrations (Google Calendar, Google Drive)**

Notes:

WEEK 3-4: Donor & Constituent Management (Days 15-28)

CRM System Setup (Days 15-21)

- **Apply for Salesforce Power of Us**

Visit: salesforce.org/power-of-us

FREE for up to 10 users

- Complete Salesforce NPSP setup wizard
- Customize fields for your organization
- Import existing contacts (if applicable)
- Create basic reports (Donation summary, Contact list)
- Set up dashboards (Fundraising, Contact overview)

Notes:

Email Marketing Platform (Days 22-28)

- Choose email marketing platform (Mailchimp or Constant Contact)
- Create account and apply for nonprofit discount
- Import contact list from CRM
- Create email templates (Welcome, Thank you, Newsletter)
- Set up automated welcome series

Notes:

WEEK 5-6: Fundraising & Financial Management (Days 29-42)

Online Donations (Days 29-35)

- Choose payment processor (Stripe or PayPal)
- Create account and apply for nonprofit rates
- Set up donation form on your website
- Test donation form with small test donation
- Configure monthly recurring giving
- Plan integration with CRM

Notes:

Accounting Software (Days 36-42)

- Choose accounting software (QuickBooks, Xero, or Aplos)
- Create account and apply for nonprofit discount
- Connect bank accounts
- Set up nonprofit chart of accounts
- Create basic budget
- Set up essential reports (P&L, Balance Sheet, Budget vs Actual)

Notes:

WEEK 7-8: Website & Public Presence (Days 43-56)

Website Setup (Days 43-49)

- Choose website platform (WordPress, Wix, or Squarespace)
- Apply for nonprofit discount (if applicable)
- Purchase hosting (DreamHost offers FREE hosting for 501c3s)
- Choose template/theme
- Add essential pages (Home, About, Programs, Donate, Contact)
- Add donation form to website
- Test on mobile devices
- Set up Google Analytics

Notes:

Design Tools (Days 50-56)

- Apply for Canva Pro (FREE for up to 10 team members)
- Set up brand kit (logo, colors, fonts)
- Create essential templates (Social media, Event flyer, Newsletter)
- Invite team members to Canva

Notes:

WEEK 9-12: Security, Automation & Documentation (Days 57-90)

Password Management (Days 57-63)

- Choose password manager (1Password has 50% nonprofit discount)
- Create account and apply for nonprofit discount
- Add all current passwords to password manager
- Set up team vaults (Board vault, Staff vault)
- Enable two-factor authentication on critical accounts

Notes:

Basic Automation (Days 64-70)

- Create Zapier account (15% nonprofit discount)
- Set up: New donation → Add to CRM → Send thank you
- Set up: Email signup → Add to CRM and email list
- Set up: New Salesforce contact → Add to email platform
- Document how each automation works

Notes:

Documentation (Days 71-90)

- Create technology documentation folder
- Document system access and passwords location
- Create process documents (Add donor, Send email, etc.)
- Create emergency contact list
- Schedule monthly technology review

Notes:

QUICK REFERENCE: Free Nonprofit Programs

Google Workspace - google.com/nonprofits (FREE)

Salesforce NPSP - salesforce.org/power-of-us (FREE for 10 users)

Canva Pro - canva.com/canva-for-nonprofits (FREE for 10 members)

Microsoft 365 - microsoft.com/nonprofits (FREE options)

Slack - slack.com/nonprofits (FREE for teams under 250)

TechSoup - techsoup.org (Gateway to discounts)

Google Ad Grants - google.com/grants (\$10,000/month FREE ads)

90-DAY COMPLETION CHECKLIST

- Professional email (@yourorganization.org)
- Team communication tool (Slack)
- CRM system set up (Salesforce or alternative)
- Email marketing platform configured
- Online donation capability
- Accounting software tracking finances
- Website with essential pages
- Design tools for creating materials
- Password manager for security
- Basic automation between systems
- Documentation for your team

Need Help With Your Technology Setup?

Setting up your nonprofit's technology foundation doesn't have to be overwhelming.

Mission Tech Advisors helps nonprofits:

- Choose the right tools for their needs
- Apply for nonprofit discounts and programs
- Set up and integrate systems
- Train teams for successful adoption
- Build sustainable technology practices

Schedule a free consultation:

www.missiontechadvisors.com/contact

ebooth@missiontechadvisors.com

ABOUT MISSION TECH ADVISORS

Mission Tech Advisors helps mission-driven organizations streamline their technology, integrate systems, and focus on what matters most—making an impact.

With over 15 years of experience serving nonprofits, we specialize in system integrations, custom development, Salesforce customization, technology strategy, and ongoing support.