CCS

FUNDRAISING

How Nonprofits Can Achieve Operational Excellence in Times of Perpetual Change

CCS SYSTEMS & CHANGE MANAGEMENT

Content

It is a uniquely challenging time in the nonprofit sector. Nearly all of the leaders we've spoken with recently are wrestling with existential questions shaped by shifts in funding and policy, heightened scrutiny, advances in technology, and the realization that the way we work will look very different months – not years – from now. There is risk in change, but greater risk in avoiding preparation for a future that will demand both agility and an unwavering commitment to our values.

Through these conversations, what's also consistent is the conviction that the work done in our sector is essential, especially in these times, and the relentless hope that by working together and leaning into the difficult choices that need to be made, we'll be able to remain a consistent presence for the communities and people we serve.

We still have tremendous ability to affect the future, and many of the decisions that will determine how we show up are operational ones: what we invest in, where we prioritize and pull back, how we define and measure success. We hope this paper can serve as a helpful tool and guide on how to navigate these decisions within your own organization.

This paper is designed for multiple audiences in mind.

For leadership: to give shape and structure to the concept of operational excellence and create a shared language and platform for discussing organizational dynamics and tensions with your colleagues.

For managers: to provide concrete, practical examples on how to solve for operational challenges faced by your teams.

For individual contributors: to empower you to frame requests and challenges in a context that resonates with executive stakeholders, connecting operational improvements to dollars raised and saved.

With this paper, we invite you into a conversation about the challenges we cannot fundraise our way out of – the operational challenges that demand creativity, discipline, and shared problem solving. By addressing these head-on, we can position our organizations, and our sector, to thrive.

With gratitude,

Allison Willner
Executive Vice President
Practice Lead, Systems & Change Management
CCS Fundraising

What Does it Mean to Be Excellent?

Excellence is a tricky word, because in the domain of operations, it has so often become synonymous with another, similar word: efficiency.** The distinction between these two words is critical – not just linguistically, but philosophically.

Efficiency, as a goal in isolation, is dangerous. Especially so in the business of philanthropy, which is all about relationships. A nonprofit leader must balance donor expectations with both organizational needs and the creation of a positive experience for staff and volunteers. The standards to which nonprofits are held differ from those of for-profit companies, as does the level of trust that ensures donations continue to come in. They must do all this while intentionally preserving the dignity of the individuals impacted by their mission – students, patients, and recipients of food, housing, and care. **Efficiency is not the most important thing to solve for. It is a component of operational excellence, but not the heart of it.**

An organization that is operationally excellent is capable of foresight and continuous learning. **Excellent organizations maximize the impact of their missions through the systems and practices they have in place – the operational connective tissue that allows teams to collaborate, speak the same language, and grow thoughtfully.** Operational excellence has top- and bottom-line impact. It's hard-won but elegant, and often invisible when achieved. Operational excellence is established through a deliberate series of decisions: what to slow down, what to speed up, where to dedicate an abundance of time, and what activities to sunset. It's making choices about systems and structure that put you in the best position to achieve your goals.

We all know – in theory – what would make our organizations more excellent: better data, better visibility, better prospects, everyone's time applied precisely to the highest value tasks. The conventional best practices that work as-is if administered in a vacuum. But the reality – as we all know – is far murkier than that, especially so in an environment categorized by change fatigue, budgetary restrictions, and fear of the unknown.

The central question for nonprofit operations leaders then becomes:

How can we bring our organizations closer to operational excellence with every decision we make?

**OUR CENTRAL QUESTION CAN BE BROKEN DOWN INTO TWO COMPONENTS:**

1. *How can nonprofits fortify their operations to meet the challenges of today?*

2. *How can we all feel more equipped to handle – if not anticipate – the changes likely to impact our organizations in the coming weeks, months, and years?*

You likely recognize these pressures; they're the issues that keep leaders up at night. Managing through leadership transitions, the loss of funding, or the ambiguity of the road ahead. Wondering how much of the carefully crafted strategic plan is still viable in the changing landscape of federal funding. Breaking down silos within the organization and countering the entropy that comes with organic growth. Doing more with less amid budgetary constraints. Tapping into the cultural zeitgeist around the power and promise of artificial intelligence, but doing so without compromising the trust and authenticity necessary for a relationship-based business to succeed.

These are "ecosystem problems" – beyond any one department's ability to solve, influencing and influenced by stakeholders across the organization and the opportunity landscape outside of it. The friction they cause is often just the tip of the iceberg, and diligent analysis is required to find the underlying issues and solve them in the right way. They test the strength of your operations and your ability to diagnose and respond.

Through this paper, we'll focus on six themes emerging from CCS Fundraising's work with complex, high-performing organizations – all of which are essential to building organizational resiliency and responsiveness, especially in times of disruption.

The themes are as follows:

COLLABORATION	**CHANGE MANAGEMENT**	**TRUST**
SIMPLICITY	**SPEED**	**RISK**
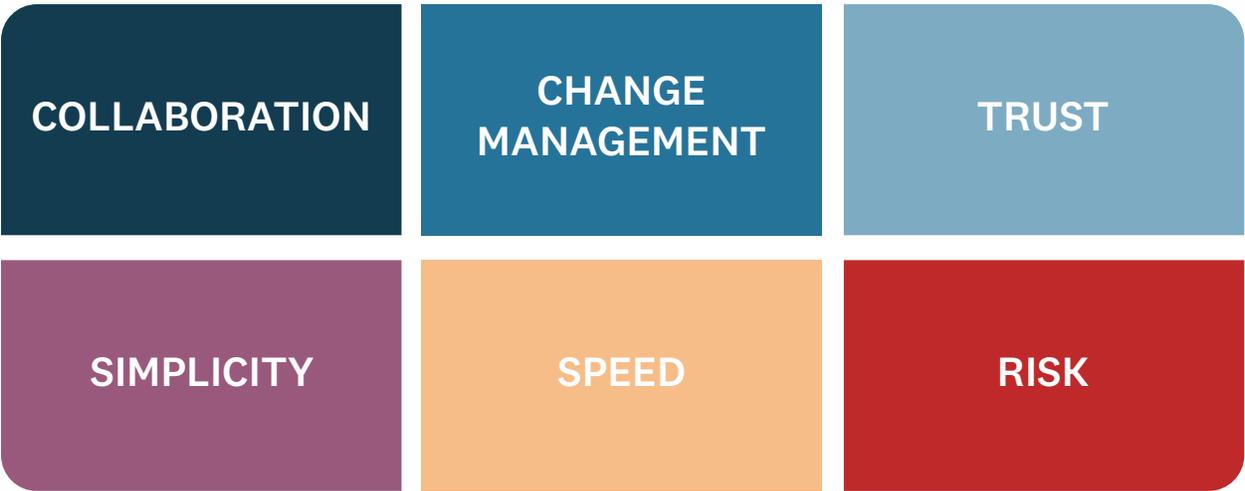
For clarity, we'll define each theme in the following way:

1. **Collaboration:** Working together to create a cohesive experience that maximizes donor lifetime value, and fostering shared accountability for stewardship of donors, dollars, and data.
2. **Change Management:** Improving the success rate of new expectations and initiatives large and small, recognizing that change is a constant for many organizations.
3. **Trust:** An essential ingredient for achieving a collaborative working dynamic between an organization and its supporters through transparency, responsible financial management, and data stewardship, as well as within internal teams.
4. **Simplicity:** A means of combating change fatigue, bringing focus and relevance to everyone's role within the organization, and a call-to-action for clear and direct decision making and communications.
5. **Speed:** Accelerating the pace at which decisions can be made and enacted, to reduce the time it takes to realize the gains from those changes.
6. **Risk:** Responsibly increasing organizations' tolerance for risk, balancing the fear of change with the known danger of inaction.

Each chapter of the paper explores one of the six themes in detail, examining how organizations are making each one a core practice, providing case studies from recent CCS partnerships, and showcasing tools and techniques readers can use to enhance their own institutions' operational stability.

This paper doesn't offer easy answers. In fact, there are no easy answers. Rather:

> *We aim to provide readers with a way to identify and give shape to some of the dynamics at play - and to share strategies and tactics to help you feel more adept in navigating them.*

We hope that by incorporating these tactics and "controlling the controllables," nonprofit leaders might be able to not only achieve greater financial success, but also reclaim more of the joy that is such a real and important part of why we are in this line of work.

The Importance of this Conversation Today

W hile the idea that "the only constant is change" is a longstanding concept (commonly attributed to the ancient Greek philosopher Heraclitus, circa 500 BCE!), the headwinds impacting the nonprofit sector today are uniquely challenging for a number of reasons, including those outlined below:

THE "OVERHEAD MYTH" AND HISTORIC UNDERINVESTMENT IN OPERATIONS

For many years, the pervasive belief that the effectiveness of a nonprofit is directly correlated with low operational costs put many organizations in the dire position of limiting necessary investments in staff salaries, critical infrastructure, and capacity-building initiatives. This myth, that only dollars dedicated to programmatic activities are responsibly spent, has burdened many organizations with residual inefficiency – in part because they could only solve parts of problems, or address symptoms as they arose.

While perceptions are beginning to change, with charity watchdog groups urging donors to assess nonprofits based on impact, not overhead, **the years of operational and technical debt many organizations are facing will not be easily resolved with a single software solution.** It will require diligent, coordinated effort between internal teams to achieve true operational agility.

THE COVID-19 PANDEMIC FORCING CHANGE WITHOUT CHOICE

Through the abrupt pivot to remote work and service delivery, the Covid-19 pandemic proved to be a pressure test of organizations' information systems. Staff were reliant on remote technology and had to quickly update processes and guidelines to adapt to the virtual environment. Organizations who were accustomed to paper file management, mail processing, or bank deposits needed to recalibrate and roll out new ways of working on an expedited timeframe.

During the pandemic, organizations were forced to change in a way they did not expect, on a timeline they did not choose. Given that change is disruptive in the best of circumstances (desired, planned for, supported and communicated in advance), unanticipated change at this scale has certainly led to elevated levels of change fatigue. Many nonprofit staff and leaders we work with have expressed a desire for stability, acknowledging that the appetite for transformation is low.

Now, largely post-pandemic, the question remains: how many of the processes and expectations established during the COVID-19 pandemic should be preserved? What changes, if anything, in the hybrid work environment? How are our donors likely to answer these questions for their own teams and workforces, and how should our approach to fundraising change in response? Faced with these questions, many organizations are thinking critically about how best to leverage their unique strengths and lessons learned as they plan for future growth.

SHIFTING FEDERAL PRIORITIES AND POLICY CHANGES

Changes in federal leadership continue to reshape the nonprofit operating environment. Since early 2025, the nonprofit sector has been significantly impacted through a series of executive orders, heightened scrutiny around the uses of federal dollars, and changes to the regulatory and legal environment.

Cuts to domestic social programs, particularly in housing, food assistance, and healthcare, have raised demand for safety-net services. Nonprofits providing those services face increased pressure and funding uncertainty, with less of those necessary dollars coming from federal sources. Similarly, organizations with missions advancing environmental conservation and the preservation of wildlife will likely be challenged by reduced federal protection of public lands, at-risk habitats, and migratory bird species.

Organizations with missions focused on social justice, human rights, and immigration have found themselves under greater scrutiny, with grant funding at-risk for programs advancing racial justice, equity, reproductive rights, LGBTQ+ causes, and more. Additionally, colleges and universities have been subject to negative attention from the administration, with research funding pulled back from schools refusing to comply with the administration's requests, scholarship dollars in question, and direct action taken against institutions like Harvard University.

For some organizations, these changes have served as a catalyst for increased support from non-government sources. **For many, the uncertainty has created a more urgent need to diversify funding sources, strengthen connections to individual donors, and keep a close eye on budget management.**

Regardless of mission or political affiliation, many organizations are engaging in scenario planning and financial review to adapt to the circumstances most likely to impact the viability of their operations. Doing so will allow them to react with speed and intention should those scenarios come to pass.

Visualizing Tensions

Finding the Right Balance for Your Organization

WHEN IS A BEST PRACTICE NOT A BEST PRACTICE?

When considering what it looks like to be excellent, it's common to start with a search for "best practices" – what industry peers are finding success in doing. However, it can be tricky to apply a practice working for one organization directly into your own, especially without full understanding of the internal and external factors contributing to that strategy's effectiveness.

Increasingly, we're hearing organizations talk about moving beyond the status quo, or a one-size-fits-all solution, toward "next practices" (future-focused and innovative), "emergent practices" (adaptive and evolving), or "different practices" (alternative to the mainstream). Taking that a step further, sophisticated shops are having thoughtful conversations about the operational and cultural shifts necessary to advance their philanthropic goals.
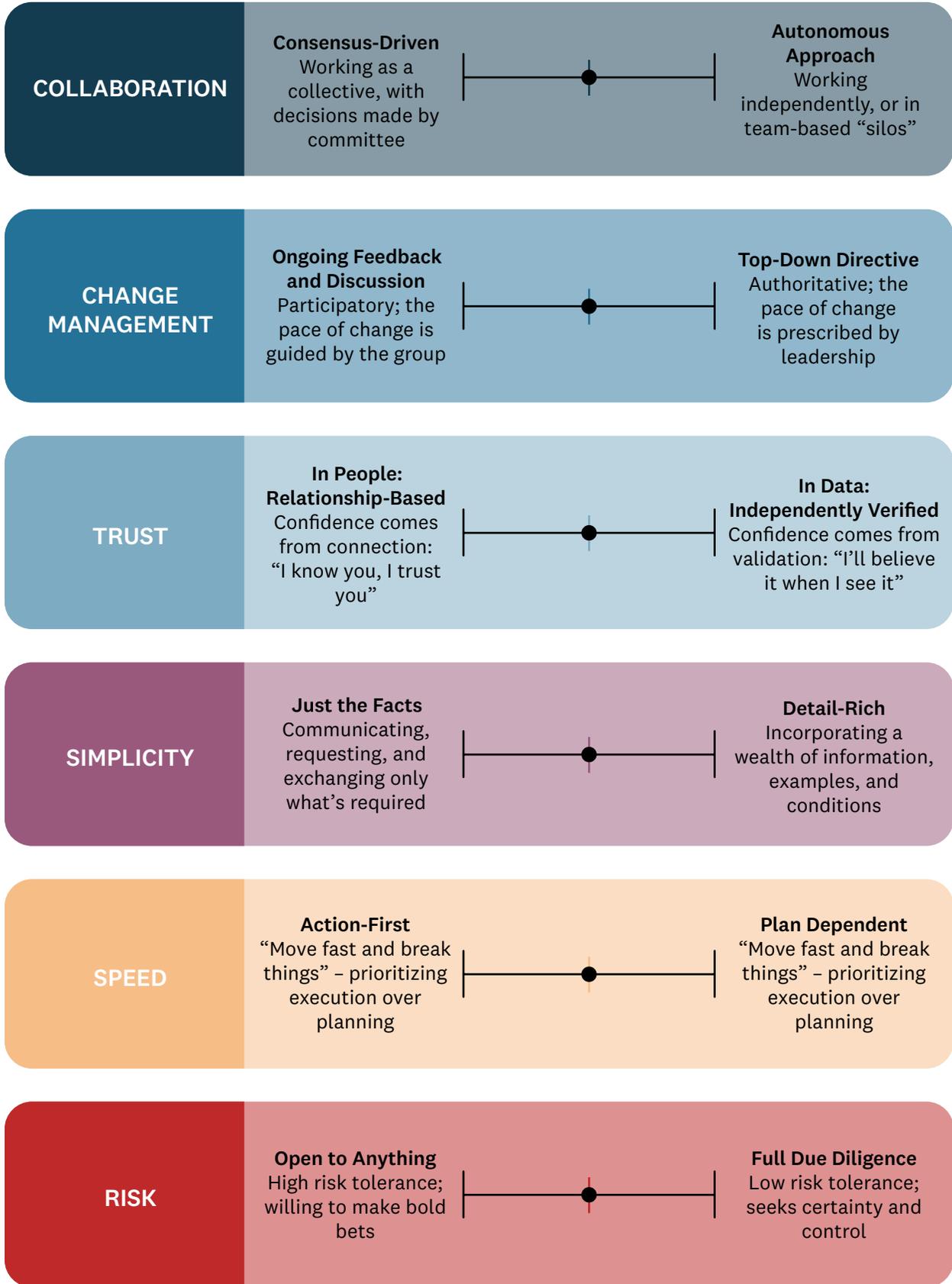
The slider bar framework below is intended to help readers assess their organization's current position across a range of factors that shape operational excellence and compare that position to approaches we've seen work well in today's philanthropic landscape. It's a way of sharing dynamics that support agility and stability in times of change while contextualizing the strategies and tactics that are outlined throughout the rest of the paper.

Slider bar framework - an example:

HOW TO BE EXCELLENT

100% Best Practice

100% Custom Approach
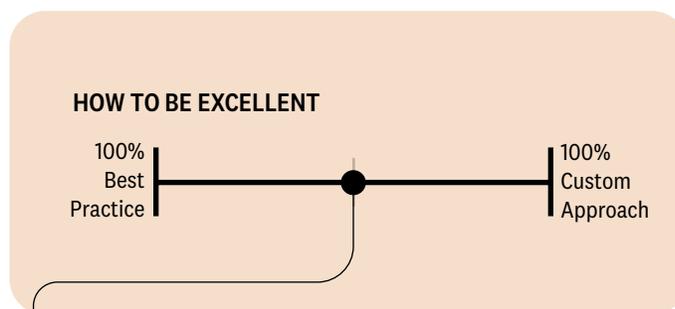
Operational excellence is best achieved by finding a balance between accepted "best practice" and the unique needs, vision, and values of your organization.

Many organizations are moving away from the notion of universal best practices and seeking instead to learn more about why a certain approach has worked well for a peer or counterpart, to better understand what conditions need to be in place for that practice to have the impact intended.

COLLABORATION

Consensus-Driven
Working as a collective, with decisions made by committee

Autonomous Approach
Working independently, or in team-based "silos"

CHANGE MANAGEMENT

Ongoing Feedback and Discussion
Participatory; the pace of change is guided by the group

Top-Down Directive
Authoritative; the pace of change is prescribed by leadership

TRUST

In People: Relationship-Based
Confidence comes from connection: "I know you, I trust you"

In Data: Independently Verified
Confidence comes from validation: "I'll believe it when I see it"

SIMPLICITY

Just the Facts
Communicating, requesting, and exchanging only what's required

Detail-Rich
Incorporating a wealth of information, examples, and conditions

SPEED

Action-First
"Move fast and break things" – prioritizing execution over planning

Plan Dependent
"Move fast and break things" – prioritizing execution over planning

RISK

Open to Anything
High risk tolerance; willing to make bold bets

Full Due Diligence
Low risk tolerance; seeks certainty and control

WHAT WE'VE SEEN WORK WELL:

To increase operational agility in times of change, consider the following approaches (all explored in greater depth further on):

COLLABORATION

Consensus-Driven — Autonomous Approach
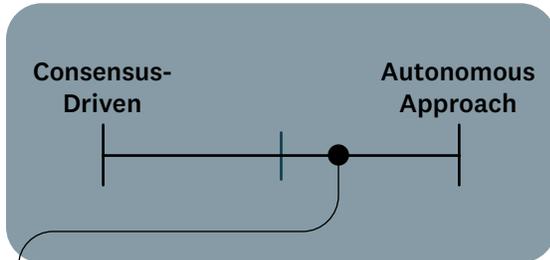
Approach collaboration like a **Series of Negotiations.**

Organizations with a highly consensus-driven culture benefit from the inclusion of everyone's perspective but might struggle to move as quickly as needed. Organizations working in silos promote independent problem-solving but risk duplicative work. Clarifying each team's role and purpose helps define handoff points and dependencies and work effectively together.

CHANGE MANAGEMENT

Ongoing Feedback and Discussion — Top-Down Directive
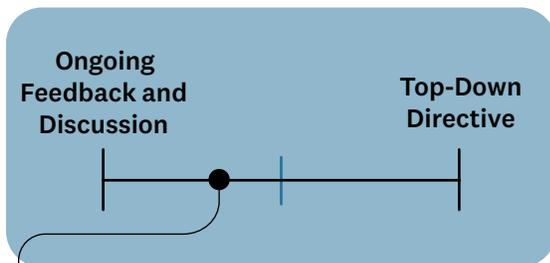
When adopting new ways of working, use a **"Discuss, Decide, Communicate, Proceed"** approach to keep momentum and build trust.

Involve a range of stakeholders early and be clear about who makes the final decision. After deciding, share the outcome, invite questions, and offer a space for feedback – without reopening the decision. This approach builds trust, while protecting progress from a contrary coalition holding up progress.

TRUST

In People: Relationship-Based — In Data: Independently Verified
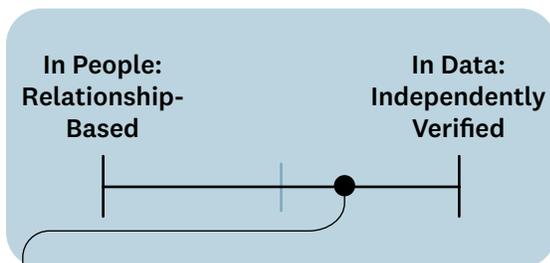
Foster a **Culture of Transparency** within your organization.

Be proactive and forthcoming with internal and external stakeholders, embrace vulnerability, and back up statements with evidence. While fundraising will always be a relationship-driven business, donors expect to see proof that their gifts are being stewarded and spent in accordance with their intended use. Strong bonds within internal teams are built through openness and candor. Being upfront with both audiences is imperative to trust.

WHAT WE'VE SEEN WORK WELL:
To increase operational agility in times of change, consider the following approaches (all explored in greater depth further on):

SIMPLICITY

Just the Facts — **Detail-Rich**
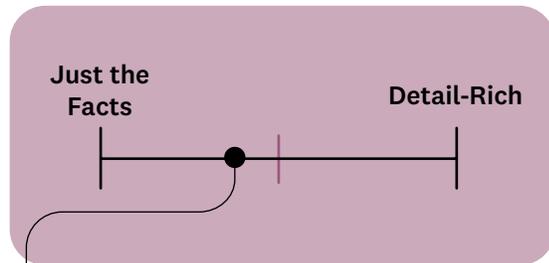
Endeavor to communicate in a way that's **Clear and Contextual.**

Help your audience can understand the "why" alongside the what, when, and how, and help find the best solution.

It can be counterintuitive – shouldn't we ask for exactly what we want? There are many ways to answer a question, segment a group of donors, or explain the impact of a gift. Sharing the purpose or intended use of a data set, list request, or set of priorities can lead to a more accurate outcome and reduce the need for back-and-forth clarification.

SPEED

Action-First — **Plan Dependent**
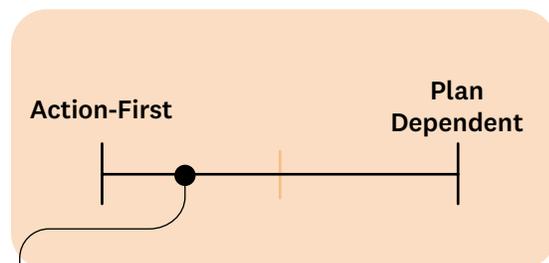
Rather than trying to solve for everything before getting started, take an **MVP Approach**.

Design the "minimum viable product" required to test and deploy your strategy. Additionally, consider defining a specific subset of prospects, donors, or gifts to use as part of the MVP, or establishing a threshold above which certain rules apply. Doing so can make it easier to build on a working model if successful or adjust if not.

RISK

Open to Anything — **Full Due Diligence**
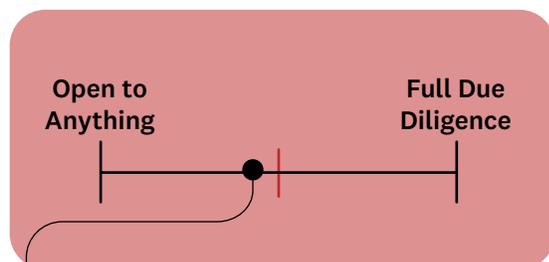
Take a bold approach by engaging in **Scenario Planning With a Bias Towards Action.**

Navigating the uncertainty facing the sector today requires embracing a level of risk not familiar to many in the nonprofit space. It also requires mitigating that risk by thinking through the possible impact and implications of each decision on your internal and external stakeholders. Doing so requires understanding what your organization won't compromise on, to ensure inputs and ethical boundaries shape your planning.

THEME 1
Collaboration
Shared Accountability for Donors, Dollars, and Data

COLLABORATION AS A DRIVER FOR OPERATIONAL EXCELLENCE AND ORGANIZATIONAL RESILIENCE

Relationships between gift officers and the donors they manage are often at the center of conversations around fundraising success. However, the ecosystem of teams and partners responsible for ensuring the right asks are made by the right people at the right time is of equal importance. As organizations scale their reach and deepen their impact, many are seeking to strengthen the coordination and collaboration across their internal teams to create more consistent, positive donor experiences.

A focus on greater collaboration between internal teams (including frontline fundraisers and operations, annual fund and major giving, development and finance) and external partners (institutional leadership, clinicians, faculty, community leaders) has been at the heart of many complex organizations' operational plans.

When staff collaborate more, visibility is increased; organizations can identify key data signals earlier and anticipate potential issues before they arise. Additionally, teams that work together effectively gain a clearer understanding of how upstream actions impact downstream results. With a broader understanding of the organization's operations, they can proactively support one another, leading to greater resiliency when one part of the whole becomes overtaxed.

HIGHLIGHT: IDEAL DYNAMICS AND COMMON POINTS OF TENSION
Between internal teams

TEAMS	IDEAL DYNAMIC	POINTS OF TENSION
Frontline & Operations	• True thought partners • Curators of the donor experience	• Frontline not using systems • Operations seen as "support"
Development & Finance	• Co-stewards of the organization's financial health • Collaborative planners	• Misalignment on counting, recognition, terminology
Development & Programmatic Partners	• Symbiotic, uplifting and resourcing the organization's greatest needs	• Perception of impact on the integrity of service delivery • Lack of access to impact data

Effective collaboration begins with a shared vision for success – a "north star" that helps everyone in the organization find their place within the broader strategic plan. It is enhanced by mapping the journey of a donor from beginning to end, understanding who is involved at each stage, and in what way. With that shared understanding, teams can be able to pinpoint areas where more information, additional support, and broader perspective can enhance the donor experience, increasing the likelihood or scale of their giving. This becomes the basis for intentional collaboration.

Once those areas of opportunity are identified between teams, building the infrastructure for collaboration is mostly a series of "micro-negotiations."

For example:

What do you, as a gift officer, need from your business intelligence team?
- Possibly: A list of prospects to visit when planning a trip to Boston.

What can you offer to them in return?
- Consider: Context about the request, a commitment to trusting the data they provide, and feedback on how the information was used to further the mission. And: A commitment to entering notes about all those visits in the CRM!

Taken as a whole, these "micro-negotiations" paint a picture of the priorities and dynamics in play within your organization and provide an opportunity to create a shared language and continuous feedback loops that support continuous improvement over time.

HIGHLIGHT: CREATING A "VIRTUOUS CYCLE"
Through a commitment to continuous improvement

Data and technology are increasingly communal, with many staff using the same data points. Because of this interconnectedness, every action has an amplified effect. Understanding who you're dependent on, and who's dependent on you, has never mattered more.

When teams commit to using information in a consistent way, the organization can learn faster, adapt sooner, and act with greater confidence.

Ultimately, enhancing collaboration increases an organization's ability to respond to both challenges and opportunities. Designing systems that foster collaboration starts with understanding how each team sees its role in the broader strategy – and then removing the structural and cultural barriers that prevent effective teamwork.

TACTICS TO INCREASE COLLABORATION WITHIN YOUR ORGANIZATION:

Conduct an exercise to understand the incentives of each internal team.
- Visualize how each team's work fits into a prospect's journey (e.g., from the point a prospect first engages with your organization to the point they're able to see the impact of their giving, how is each team involved?).
- Document what each team needs from one another to make the process better for them (internal) or better for the donor (external).

Create shared terminology, establish a data dictionary, and develop core reporting.
- Ensure terms and data used by multiple teams are consistently used and defined. Host a workshop with cross-functional representation and capture the results in a data dictionary. Update the dictionary on a quarterly basis.
- Create a suite of "core" reports that reflect a universal view of progress – e.g., define how your organization will count total fundraising (cash vs. accrual), the campaign total, forecasted revenue, etc. Use these reports as a reference point to validate the accuracy of ad hoc or team-specific reports.

Define handoff points between teams, and the ideal working relationship for teams who frequently collaborate (e.g., users and consumers of data).
- Pinpoint areas where information or responsibility transfers ownership across teams and systems and clarify what the expectations are on both sides.
- Don't overcomplicate; begin with the areas that are the highest stakes (e.g., involving priority donor segments or important information).

Track collaboration through metrics and KPIs to understand its impact on dollars raised and/or time saved.
- Consider tracking collaborative solicitations (e.g., those with 2+ teams or stakeholders involved), and calculate yield rate and total dollars raised for solo vs. collaborative asks.

Build intentional relationships with partners beyond development and establish feedback loops to show the impact of that partnership.
- Active collaboration with partners like clinicians and researchers (for hospital foundations), deans and faculty (for higher education institutions), and community leaders (for social service organizations) is integral to ensuring your fundraising activities are making the greatest impact.

SNAPSHOT

WHY INVEST IN COLLABORATION?
- A better donor experience, leading to increased donor lifetime value.
- Greater operational efficiency, with clear roles and handoff points between teams.
- Increased responsiveness to external factors, with organizations able to bring their best thinking to bear.

CASE STUDIES

HEALTHCARE FOUNDATION   "Process Pressure-Testing" Workshop

CCS partnered with a Healthcare Foundation to increase collaboration between teams and drive greater adoption of the organization's CRM system to more effectively identify and capitalize on fundraising opportunities.

As a key component of the process, the Foundation adopted a new workflow for prospect identification, assignment, management, cultivation, and stewardship. After providing training on the process, CCS facilitated a "Process Pressure-Testing Workshop" – with the aim of ensuring all parties involved had working knowledge of not only their own role in the process, but how all the pieces came together. Everyone took on a new persona – the CFO became the Database Administrator and the Major Gift Officer became the Head of Operations. The team then talked through the process step by step, surfacing questions that could be answered in the room when the group hit a stumbling block.

At the end of the workshop, everyone in the room knew more about one another's roles, and we were able to further refine our documentation of the process to address the questions that were raised when the process was "live."

NETWORKED NONPROFIT   Building the Processes Needed to Support Collaborative Fundraising

As part of a broader initiative to foster greater collaboration across its national network, a US-based Networked Nonprofit engaged CCS to help build the infrastructure, policies, and processes necessary to support collaborative fundraising at scale.

To do so, CCS facilitated a series of working sessions with executive leaders from across the network to surface the practical needs and obstacles impacting collaboration between the national office and local associations. The goal of this process was to enable the network to pursue larger, more impactful gifts by developing coordinated approaches, demonstrating collective impact, and strengthening peer learning to benefit everyone's experience.

Through this work, the team uncovered a set of recurring challenges to collaboration. Some of these, like shared messaging, a case for support, and standardized data collection, were best addressed at the national level. Others, like local impact measurement and storytelling, required leadership from individual associations. With clear priorities in hand, the team piloted the new approach with a select group of foundation and corporate funders. This pilot showed "micro-negotiation" in action and laid the groundwork for unlocking more collaborative revenue across the network.

THEME 2

Change Management
Bringing Everyone Along While Keeping Pace

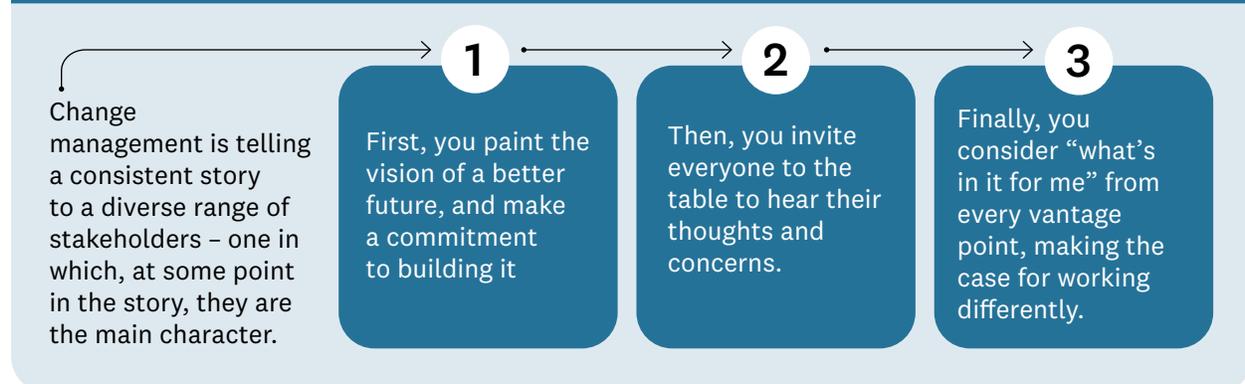## CHANGE MANAGEMENT AS A DRIVER FOR OPERATIONAL EXCELLENCE AND ORGANIZATIONAL RESILIENCE

Change management is an organization's systematic approach to engaging with and supporting teams through times of transition.

Much more than a buzzword, effective change management:
- is both proactive and continuous
- applies to organizations and changes of all sizes
- recognizes the risk of both change and inaction
- helps organizations save time and money, while not only retaining but growing staff – because even the most positive and welcome changes are disruptive

HIGHLIGHT: AN ALTERNATIVE DEFINITION
What does change management look like in practice?

Change management is telling a consistent story to a diverse range of stakeholders – one in which, at some point in the story, they are the main character.

1 First, you paint the vision of a better future, and make a commitment to building it

2 Then, you invite everyone to the table to hear their thoughts and concerns.

3 Finally, you consider "what's in it for me" from every vantage point, making the case for working differently.

When building a case for change, it's important to consider the logical reasons why someone might choose not to go along with it. For example, if they're feeling comfortable with the status quo, or experiencing change-fatigue. If they fail to see the benefits for themselves or the organization. If they are feeling excluded from the decision-making process or perceive a lack of communication or commitment from management.
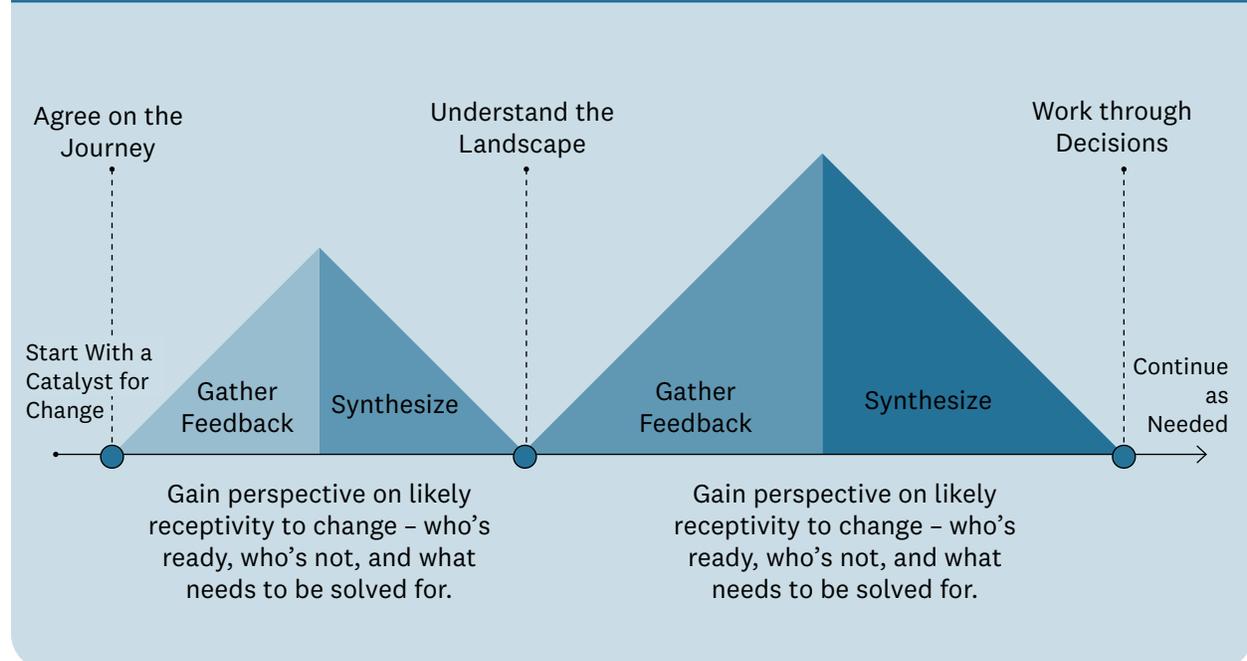
Sometimes, the challenge is a lack of confidence around technology – a fear that they may be "left behind" or lose power or control in the new post-change environment. They may feel underappreciated or threatened by what is to come. They may feel constrained by limited resources like time or money.

All are valid factors, and reasons why a thoughtful change management strategy requires a basis of deep respect and genuine curiosity in order to succeed. It requires accepting that there will likely be resistance and committing to working through the cycles of presenting a plan, gathering feedback, refining and advancing the plan, and gathering feedback once more. The cycle might repeat for weeks, months, or years, depending on the scale and expected impact of the change.

It requires relentless overcommunication and vulnerability from leadership, who may be sharing information while plans are still in development. This might be uncomfortable for some. It benefits from (and can help create) a culture of psychological safety, where staff feel able to raise their questions early on, allowing for each "cycle" of feedback, decisions, and communications to take the organization further.

HIGHLIGHT: VISUALIZING THE CHANGE MANAGEMENT JOURNEY
Cycles of feedback, synthesis, and communication

Agree on the Journey

Understand the Landscape

Work through Decisions

Start With a Catalyst for Change

Gather Feedback

Synthesize

Gather Feedback

Synthesize

Continue as Needed

Gain perspective on likely receptivity to change – who's ready, who's not, and what needs to be solved for.

Gain perspective on likely receptivity to change – who's ready, who's not, and what needs to be solved for.

How can a nonprofit leader increase their organization's tolerance for change? Removing ambiguity throughout the process goes a long way. The more certainty that can be created, whether in the form of concrete, real-life examples, hands-on training, walking through or acting out a new process, or providing a sandbox to test out a new system before go-live, the less risky that change becomes.

"The more change involves uncertainty, the less interested people are in changing. The more ambiguity there is around a product, service, or idea, the less valuable that thing becomes. Less like a gift card and more like a lottery ticket." – Jonah Berger, The Catalyst

TACTICS TO INCORPORATE CHANGE MANAGEMENT INTO YOUR ORGANIZATION'S GROWTH PLANNING:

Set the vision with a compelling case for change and show how everyone factors into that vision.

- Consider focus grouping that vision with select stakeholders in your organization, to ensure all teams can see themselves in the process and gain early insights into how each group might react to the change.

Describe what won't be changing.

- Put another way, change management is about creating stability when and where you can. Make sure conversations are not focused exclusively on what is new – reiterate what will be familiar in the future state.

Reduce ambiguity, and give people the opportunity to experiment.

- Use real world examples wherever possible, so people can translate from the old to the new.

- Don't underestimate the role of play – the more fun you can make the process of learning something new, the more likely it is to stick.

Always provide an "on-ramp" to the conversation so staff can engage fully, regardless of how familiar they are with the process.

- Begin meetings with a few set slides or familiar paragraphs explaining why the organization is changing, what is gained through the process, where we are in the timeline, and what we're solving for today.

Overcommunicate, and do so with consistent language and visuals.

- Provide regular updates and keep track of the audiences receiving them to ensure sufficient coverage. The cadence of communications should generally begin with leadership, with additional detail and context provided by each level of management to their respective teams, using consistent terminology.

SNAPSHOT

WHY INVEST IN CHANGE MANAGEMENT?

- Faster and more comprehensive adoption of new ways of working
- Greater staff retention through times of disruption
- A better end product, with continuous feedback and refinement throughout

CASE STUDIES

NETWORKED NONPROFIT   **Managing Change Around an Operating Model Shift**

CCS partnered with an international Networked Nonprofit preparing to shift its operating model to engage donors through more channels and unlock greater fundraising potential. To guide this complex change, CCS engaged hundreds of stakeholders, developing a clear, repeatable cadence for sharing updates and soliciting feedback.

Our approach alternated between large-group information-gathering exercises and focused synthesis, bringing revised materials back to stakeholders for further input. This iterative process ultimately led to leadership decisions, which were then cascaded across the organization. Throughout, we relied on consistent visuals, metaphors, and messaging to create a shared entry point for the conversation – helping participants feel informed and supported, even when not everyone agreed with the outcomes.

Ultimately, once the operating model shift took place, staff were more prepared and equipped with a comprehensive understanding of what was coming, how they would be affected, and how to be proactively involved.

HEALTHCARE FOUNDATION   **Delivering a Multifaceted Training Approach**

CCS partnered with a large Healthcare Foundation to help their team become more data-driven. The engagement included defining key performance indicators, setting goals at the individual, team and department levels, standardizing terminology, and upskilling staff on how to use their CRM to track progress and support fundraising efforts.

With over 100 staff involved, including leadership, managers, associates, assistants, and major gift officers, we knew that a one-size-fits-all training wouldn't work. Instead, we designed a multifaceted approach: general sessions to align everyone on the vision, tailored sessions for managers and assistants to support their specific roles, and open "office hours" where team members could ask questions in a judgment-free environment.

Training was delivered in multiple formats: reference guides, recorded modules for self-paced learners, in-person trainings, and hands-on workshops. This helped to make sure staff had the greatest opportunity to learn according to their own style. We also built in regular checkpoints to assess learning progress and offered supplemental training to fill gaps as they arose.

This approach increased compliance with the new data standards and provided the team with a wealth of material to support their journey towards greater data sophistication.

THEME 3
Trust
In the Institution, the Use of Dollars, and Between Internal Teams

TRUST AS A DRIVER FOR OPERATIONAL EXCELLENCE AND ORGANIZATIONAL RESILIENCE

At a time when skepticism is high and trust is hard-earned but easily lost, organizations must make trust-building a strategic priority – both with external partners and internal teams.

Preserving the trust built through years of genuine partnership, excellent programmatic work, and impactful service delivery requires intentional effort. This is especially true as nonprofits are challenged to make difficult choices to grow and fulfill their missions.
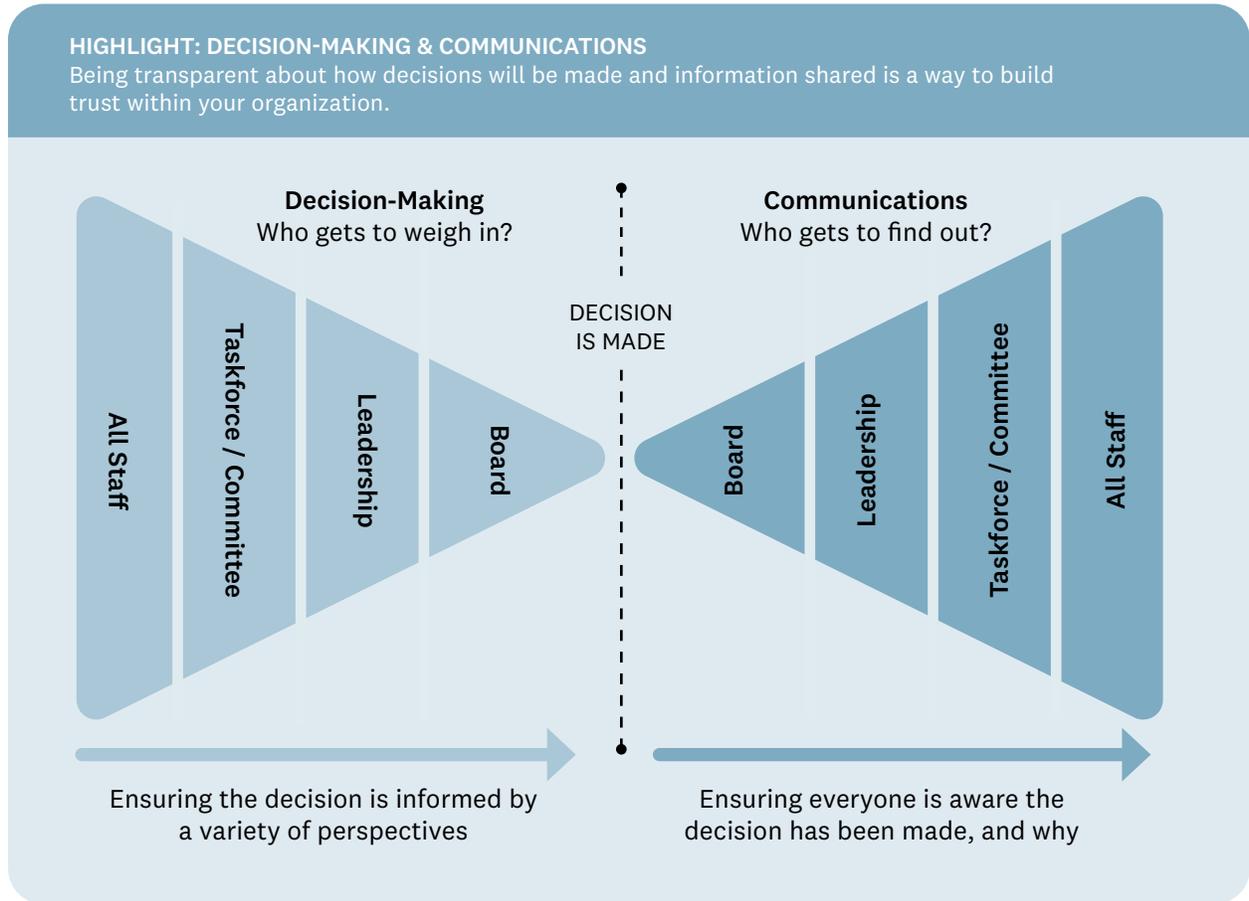
Trust is cultivated and reinforced through policy, through what the organization accepts and doesn't. Tolerance for responsible risk. Transparent and proactive communication about decisions made, and the logic behind them. Providing donors with accurate accounts of their giving. Stewarding their personal information properly. Spending their dollars as directed.

Building trust internally is equally important. The more staff trust one another, the less time needs to be spent in meetings confirming information shared. The more your organization trusts its data, the less time needs to be spent on review and validation.

The challenge with building trust is that it requires vulnerability, much like change management. It requires telling the stories of things that go well, and things that don't – successes and failures alike. Both the initiative that brought in a major gift, and the event that didn't go as planned. By introducing metrics that track "bad outcomes" and conducting "post-mortems" for strategies that failed to achieve the intended effect, organizations will build the muscle required to turn perceived failures into learning experiences and improve in the future.

There's also a note to be made here about AI, and the use of generative AI in particular, to communicate and engage with donors. Many organizations are asking themselves how to balance automation with authenticity, creating unique touchpoints and greater internal efficiency by using these tools without risking donor data or violating the trust they've built with their donor base.

While there is tremendous potential for artificial intelligence in scaling the effectiveness and impact of fundraising teams, caution is very much warranted. In the healthcare space, where preserving the security of patient data is at a premium, some organizations are focusing their adoption of AI on internal tools that can help make teams more efficient. One such example is reflected in a case study at the end of this chapter.

HIGHLIGHT: DECISION-MAKING & COMMUNICATIONS
Being transparent about how decisions will be made and information shared is a way to build trust within your organization.

Decision-Making
Who gets to weigh in?

Communications
Who gets to find out?

DECISION IS MADE

All Staff
Taskforce / Committee
Leadership
Board

Board
Leadership
Taskforce / Committee
All Staff

Ensuring the decision is informed by a variety of perspectives

Ensuring everyone is aware the decision has been made, and why

SNAPSHOT

WHY INVEST IN BUILDING TRUST?

- Increased donor confidence, encouraging greater giving
- Greater internal collaboration, with teams working towards a shared goal
- Less time spent reviewing and validating information

TACTICS TO INCREASE TRUST WITH PROSPECTS & DONORS:

Set clear expectations with gift acceptance policies and MGO training
- There is a difference between donor interest and donor intent. Once a donor makes a gift, it's the responsibility of the organization to use those dollars according to the donor's designation.
- Equip gift officers with training, language, and guidance that empower them to have conversations with donors early in the cultivation process. This increases the likelihood of a match between donor interest and the organization's greatest needs.

Practice ethical data collection and responsible governance
- Only collect, aggregate, and use the information the organization can responsibly manage. Develop policies for the responsible handling and retention of information.
- Consider how much information is truly needed, and prioritize the data required for thoughtful relationship building.

Prioritize accurate, proactive reporting
- Ensure donors receive regular communications about the impact of their giving, and that key data points essential for maintaining trust in the institution's financial stewardship of dollars (e.g., total giving) are easily accessible and accurate.

TACTICS TO INCREASE TRUST WITHIN YOUR ORGANIZATION:

Establish a process for making and communicating decisions
- Defining a standard process by which decisions are made and communicated can help reduce confusion and build trust within internal teams.
- Individual decisions and initiatives can be tracked as they move through the process, reducing ambiguity and confusion around what leadership has chosen to move forward with.

Share wins, losses, and learnings
- Report on the truth – even if painful! Foster a culture that values continuous improvement, and is unafraid of a "no", a "not now", or to disqualify a donor in favor of cultivating another one.
- An organization that is comfortable with continuous self-reflection is one able to grow in a more agile way.

Communicate the "why"
- Make providing context an institutional practice. Put in the extra effort to explain the logic behind a decision as a means of continued education for everyone involved.

CASE STUDY

HEALTHCARE FOUNDATION   **Using AI to Strengthen Operations and Drive**

CCS partnered with a Healthcare Foundation to strengthen the operational infrastructure needed to achieve the goals outlined in their strategic plan. After conducting a comprehensive Systems Assessment – spanning people, process, and technology – we worked with the team to define key metrics, KPIs and terminology, and design streamlined workflows that would foster greater efficiency.

To ensure staff could easily adopt and apply these new standards, the foundation piloted an innovative solution: a custom large language model trained on hundreds of pages of internal documentation. This resource empowers staff to quickly find answers to operational questions, including "what KPIs apply to my role?" or "how do I log contact reports correctly?" without having to search through dense manuals.

The result: improved access to critical information, greater consistency in data practices, and a smoother path towards lasting operational change. This reflects a broader trend across the sector – organizations increasingly using AI to accelerate internal collaboration and reinforce behavior change.

THEME 4
Simplicity
Clear and Direct Decision-Making and Communications

SIMPLICITY AS A DRIVER FOR OPERATIONAL EXCELLENCE AND ORGANIZATIONAL RESILIENCE

Within the framework of people, process, and technology (all three pillars of operational excellence), we've seen both growth in complexity across the board and a desire for a "return to simplicity" as a means of restoring greater focus and prioritization to our work.

On the people side, simplicity is often synonymous with role clarity. As organizations grow, staff take on new responsibilities that often intersect and cross over with other roles. This makes the work of defining the boundaries and handover points between them a continuous practice.

Regularly aligning teams with the organization's broader strategy and reviewing individual roles to keep job descriptions current helps create a clear understanding of the organization's people structure and dynamics.

On the process side, many organizations fall somewhere on the spectrum from "dependent on institutional norms, not documented processes" to "beholden to 50+ page manuals." Neither end of the spectrum has proven to be most effective in supporting an agile, continuously learning organization.

To avoid the common pitfalls around process documentation, CCS recommends "solving for the rule, not the exception." For instance, what solution can be found to address 70-80% of use cases, and who is the right "go-to" person to triage edge cases? Taking this approach and providing a standard template for process documentation that encourages brevity and clarity can help increase compliance with desired ways of working without diluting focus.

On the technology side, with recent emphasis on "big data" and a "more is better" approach to information gathering – especially with the rise of AI – it can often be overwhelming to determine how to manage limited time, resources, and bandwidth. Depending on the organizational volume an organization is responsible for – from dollars to donors, interest to intent – data cleanup projects become increasingly complicated resource-intensive.

CCS has seen a rising trend towards "data minimalism": identifying and prioritizing the most essential data needed to drive dynamic fundraising results. Organizations taking this approach focus on the smallest number of actively managed data points that are intended to produce the greatest volume of insights. Doing so provides the opportunity for teams to learn new ways of working while also managing their day-to-day responsibilities. It's a way to make sure the full fundraising team truly understands each metric and takes ownership of their role as stewards of that data.

HIGHLIGHT: BECOMING A DATA MINIMALIST
Measuring what matters, and building a foundation of trustworthy data

1. First, determine what information is necessary to support core fundraising activities, including: portfolio management, pipeline management, donor segmentation, prioritization and assignment, and financial reporting and forecasting.

2. Then, determine what information needs to be complete and comprehensive to be useful (e.g., Total Giving is only a useful data point if we have an accurate count of all gifts), and what information is helpful in isolation (e.g., knowing a donor's interests is beneficial, even if you don't know every donor's interests.)

3. Finally, define how each priority data point should be structured, sourced, and interpreted, and establish accountability for stewardship of the information. This minimalist data set will likely not be the only data you use in your work, but it serves as a consistent, reliable, trustworthy foundation on which to build deeper analysis.

A MINIMALIST DATA SET MIGHT INCLUDE INFORMATION LIKE:

- Contact information
- Relationships
- Constituency groups
- Donor interests
- Solicitation data
- Prospect stage
- Opportunity status
- Likelihood
- Gift type/amount
- Gift fund/appeal
- Referral source
- Substantive actions

TACTICS TO FOSTER CLARITY AND SIMPLICITY:

Practice data minimalism
- Identify a limited set of essential fundraising data points and prioritize consistency, accuracy, universal understanding, and shared stewardship of that information.
- Establish clear governance for the entry, management, and use of that data by all teams across the organization, and build reports that provide leadership-level visibility into a shared means of tracking progress.

Distill processes down into their core components
- Translate expansive process documents into 4-6 major phases, and define the ideal outcomes of each. This will help all stakeholders involved understand their roles in driving those outcomes.
- Guide decision making and process improvement through these "snapshot" visuals.

Develop reports and dashboards that "go deep"
- Provide a summary view that prompts action and allows for further inquiry through filters, expanded views, and linked reports.
- Utilize tools like PowerBI and Tableau to allow stakeholders to engage with information and, in doing so, foster greater understanding.

Reduce barriers to entry for technical conversations
- Ensure conversations about data are not beleaguered with jargon or technical language that precludes domain experts from participating.

Use one-pagers and visuals to make information easier to engage with
- Spend the time to develop and workshop compelling visuals that can serve as anchors and reference points for future conversations.
- When done right, these visuals will often take on delightful names – e.g., "the slider bar page," "the growing-the-pie slide."

SNAPSHOT

WHY INVEST IN SIMPLICITY?

- Enhanced organizational agility through increased trust in data and faster recognition of signals
- Ability to work more effectively across teams with a universal language
- More compelling case for investment from a variety of stakeholders

CASE STUDY

HEALTH AND HUMAN SERVICES **Consistent Visuals & Rigorous Prioritization**

A Health and Human Services organization partnered with CCS to transform their Salesforce CRM into a reliable "single source of truth" for pipeline visibility, revenue forecasting, and streamlined reconciliation between development and finance.

Recognizing that change can stall when it feels overwhelming, we focused on a rigorous, disciplined approach, prioritizing pipeline management and revenue forecasting. This was supported by clear reports and dashboards to guide donor conversations and align funding with organizational priorities.

To drive adoption, we developed a highly visual framework that outlined four key behavior changes and three system configuration changes required to foster the visibility leadership needed. This framework, a set of 4-5 slides, was reinforced at the start of nearly every meeting and training. While the repetition became a running joke, the consistency paid off: staff could recall the framework from memory, stayed aligned on priorities, and understood how their day-to-day work supported the organization's larger goals. As changes were made to the system and as new expectations rolled out, there were no surprises, as they had already been socialized.

THEME 5

Speed

Clear and Direct Decision-Making and Communications

SPEED AS A DRIVER OF OPERATIONAL EXCELLENCE AND ORGANIZATIONAL RESILIENCE

Faced with recent volatility and uncertainty ahead, many nonprofits are challenging themselves to move faster – to implement new strategies and software on an accelerated timeline and to maintain competitiveness in a shifting environment.

To speed up the pace of progress, these organizations are exploring the use of Agile methodology and other iterative practices that encourage a "minimum viable product" ("MVP") approach over large-scale efforts. Central to these methods is the creation of feedback loops – including short cycles of planning and execution, a "test-and-learn" philosophy, and frequent surveying and focus grouping to adapt in real time. The more an organization knows about its staff, donors, volunteers, and service recipients – and their reactions to the changes being rolled out – the more that organization can continuously improve the process over time.

Designing the MVP required to test and deploy your strategy might mean defining a specific subset of prospects, donors, or gifts to focus on, or establishing a threshold above which certain rules apply. Doing so will make it easier to build on a working model if successful, or adjust if not.

Taking an MVP approach is also beneficial for organizations with small budgets or stretched teams, as the process focuses limited resources on what matters most. By breaking projects down into their essential component parts, organizations can also solve problems incrementally, learning, and celebrating success along the way.

The challenge of moving quickly is ensuring you don't abandon change management, due diligence, and other practices that can feel like friction but serve an important purpose. Taking the time to create alignment between teams on the vision for a project, the terminology and data to use, and expectations for collaboration is wise; the philosophy "slow is smooth, smooth is fast" applies here. Similarly, building in checkpoints throughout the project allows you to gather constituent feedback, establish unified direction, and confirm that your organization's values are guiding the work.

TACTICS TO INCREASE THE PACE OF PROGRESS:

Take an MVP approach
- Define specific segments on which to deploy a new strategy (e.g., focusing on just top prospects, actively managed donors, lapsed alumni from the last year, etc.).
- Limit the amount of information required to determine whether something is working, in order to make faster, more informed decisions.

Consider how much information is required to act
- Avoid "analysis paralysis" by determining upfront what questions need to be answered before the team can move forward.
- Accept that you won't have answers to everything.

Clarify who has decision-making authority
- Establish upfront who can make the final go/no go decision for a given initiative and communicate that with everyone working on the project.
- Create an easy process for elevating stuck decisions for resolution.

Convene small groups to solve focused problems
- Organize working groups, task forces, and committees to gather cross-functional stakeholders with expertise, and task them with tackling key organizational challenges. Give the group clear direction and expectations so they can gain momentum.
- Ensure the group is empowered to act and has leadership-level participation or visibility.

Establish feedback loops and ways to oversee progress
- Maintain oversight of projects and initiatives in progress and set measures by which their impact will be evaluated, making it easier to pivot or adjust as needed.

Create reliable frameworks and processes
- Avoid having to reinvent the wheel by developing a foundational set of frameworks, processes, and templates, and keep documents up-to-date so they're easy to reference and use.

SNAPSHOT

WHY INVEST IN INCREASING ORGANIZATIONAL VELOCITY?

- Faster time-to-impact for new initiatives, with more dollars raised and saved through quicker implementation
- Greater ability to adjust and refine strategies and tactics, rather than waiting for something to be "fully baked" and then deployed
- Reduced risk of plans becoming outdated once ready to use, creating internal frustration if work needs to be redone

CASE STUDY

NONPROFIT MEDIA ORGANIZATION   **Accelerating Progress Through Strategic Workshops**

CCS worked with a Nonprofit Media Organization to build the operational infrastructure necessary for near-term campaign success and long-term fundraising growth. After conducting a comprehensive assessment of the organization's structure, processes, and systems, CCS developed a roadmap to increase technology adoption, improve access to data, and foster an ideal donor experience.

Several factors made this project uniquely complex, including the need to integrate membership and fundraising data to create a holistic view of donor behavior. Additionally, other data governance and systems design initiatives happened in parallel – and our work needed to learn from them and dovetail with them to avoid potential conflicting actions or duplicative effort.

To address this, CCS convened a cross-functional workshop bringing together development, finance, and IT, as well as the stakeholders leading related efforts. This workshop was an essential step in creating critical alignment on definitions, timelines, dependencies, and governance expectations.

As a result, the organization emerged with a clearer shared understanding of the foundational inputs to each initiative and how decisions impacting multiple projects could be made together, ensuring faster, more coordinated progress across all initiatives.

Risk
Balancing the Uncertainty of Change with the Danger of Inaction

RISK AS A DRIVER FOR OPERATIONAL EXCELLENCE AND ORGANIZATIONAL RESILIENCE

As the philanthropic landscape evolves, nonprofits are starting to embrace a more balanced approach to risk, recognizing that inaction can leave organizations just as vulnerable as innovation. This growing appetite for responsible risk goes hand-in-hand with the sector's push for greater agility and the adoption of practices from the private sector.

This risk-taking often comes in the form of experimentation, with leadership encouraging staff to take advantage of cutting-edge technology and try new ways of working. Visible support for innovation from leadership is key to building an environment in which staff feel empowered to question norms and explore new ideas.

When it comes to deciding how to move forward with specific initiatives or how to deploy limited amounts of investment capital (financial, time, and attention), organizations are turning first to scenario planning, then imagining different possible futures and identifying and pressure-testing strategies that will help sustain a base of support and ensure the organization remains operationally viable.

Nonprofits engaging in this process begin by identifying potential external factors that could impact their work, including shifts in funding, changes in federal policy, technological advancements, or environmental disruptions – and determining which would most significantly influence their ability to fulfill their mission.

Once the external variables have been identified, organizations develop distinct scenarios that describe how the uncertainties might play out. For example, a nonprofit formed to protect endangered wetland birds might consider, among others:

- **Scenario 1:** Federal regulations protecting birds are rolled back, and the need for our rescue work increases, leading to a greater reliance on individual donor dollars.
- **Scenario 2:** Major corporate funders shift their giving priorities to climate technology solutions, leading to decreased grant funding for conservation work and requiring the organization to diversify its funding model.

This sets the stage for the exploration of implications, including what the organization would need to stop, start, change, or continue doing to address the challenges at hand. It also enables the organization to better plan and prepare in advance, and to develop contingency plans should those futures come to pass.

TACTICS TO BUILD GREATER COMFORT WITH UNCERTAINTY:

Establish your values at the start
- Make it clear what your organization's non-negotiables are, and what dynamics and outcomes you're working to achieve through innovation.

Encourage experimentation as an imperative to growth
- Think in terms of "innovation" and "experimentation" rather than "risk," and build comfort in to move forward thoughtfully, even when information is limited.
- Reframe failures as learnings to be uplifted and shared and, when engaging in scenario planning, discuss the potential downside risks of inaction in your calculations.

Create a "sandbox" environment in which innovation is encouraged
- Set helpful guardrails to make it safer to innovate within defined boundaries.
- Clarify what's on – and off – the table, and reduce the fear of encountering a new obstacle that could have been avoided with more information early on.

Use pilots to test new ways of working
- Use a structured and time-bound pilot framework to test the viability and impact of new initiatives.
- Establish the goal, scope, length, resource requirements, expected outcomes, and metrics for evaluation at the start.
- Take time at the end of the pilot to conduct a full evaluation and decide on what happens next: further testing, expansion of the program, adjustment to the strategy, etc.

Model risk-taking at the top
- When leadership endorses and lives a more risk-tolerant mindset, staff feel confident they can try new things as well.

Set KPIs that incentivize innovation
- For example, organizations might track the number of assumptions tested during an initiative or pilot, the percent of budget or resources allocated to R&D, the number of experiments that resulted in implementation, or operational improvements.
- In addition, review your current KPIs to ensure they aren't unintentionally reinforcing rigidity or adherence to every step of a given process over outcomes.

SNAPSHOT

WHY INVEST IN INCREASING YOUR ORGANIZATION'S TOLERANCE FOR RISK?

- Gain the ability to anticipate and plan for changes in advance, better preparing your organization to operate effectively.
- Create opportunity to harness your team's creativity and best thinking to solve organizational challenges, and adapt to the changing nonprofit environment.
- Build flexibility to test and refine new and different ways of working, allowing organizations to benefit from practices both within and beyond the sector.
- Reduced risk of plans becoming outdated once ready to use, creating internal frustration if work needs to be redone

CASE STUDY

NETWORKED NONPROFIT   **Using Pilots to Test Strategies Before Large-Scale Rollout**

CCS partnered with a large, complex Networked Nonprofit to support the network in diversifying revenue and building greater operational resiliency as the funding landscape continues to change. Over a multi-year engagement, the team worked alongside national leadership and local affiliates to learn which strategies and tactics were most effective for acquiring, retaining, and upgrading individual donors – an increasingly important segment for long-term sustainability.

Recognizing the diversity of readiness across the network's over 1,000 affiliates, the organization chose a phased approach. Rather than launching new strategies all at once, the team worked with CCS to design and implement a series of pilots with affiliates of varying sizes and capacities. The pilot process was intended to help identify ways to increase the likelihood that each strategy would be successful, and identify the conditions required (e.g., leadership support, a baseline of clean data, templates, and toolkits) that had an impact on effectiveness.

Through the pilot process, which spanned a full year, the organization not only identified which strategies were most effective, but also developed practical guidance for tailoring approaches based on an affiliate's size, readiness, and local context. Along the way, CCS helped define a set of leading indicators, both revenue and non-revenue metrics, that could be used to track early progress, inform future financial models, and guide timely course-corrections.

With the insights and data gathered through this rigorous process, the organization is now equipped with a robust set of tools, resources, and recommendations to support affiliates in strengthening their revenue pipelines. A go-to-market plan is currently underway to scale the approach to other local affiliates, helping to build greater financial stability across the network at large.

CCS Systems & Change Management

CCS Fundraising's Systems & Change Management practice helps organizations establish the operational infrastructure that makes high-impact philanthropy possible.

We look through the lens of people, process, and technology to analyze and optimize your data and systems – all with an eye toward driving top-line revenue growth and creating more efficient ways of working. We believe that "total efficiency" is not always an ideal outcome; our deep understanding of fundraising strategy ensures we strike the right balance in what will continue to be a relationship-driven business.

A Selection of Services:

- Systems Assessments
- Database / CRM Audits
- Process Mapping
- Workflow Optimization
- Information Design & Data Visualization
- KPI Development

- Visioning Sessions
- Workshop & Focus Group Facilitation
- Training Curriculum Development
- Report & Dashboard Design
- Scenario Planning & Financial Modeling
- Change Management Partnership
- Transformation Planning

To learn more about our work, visit us at: ccsfundraising.com/services/systems

Practice Leadership:

Allison Willner, Executive Vice President, founded and leads CCS's Systems & Change Management practice, partnering with complex organizations to holistically analyze and strengthen fundraising operations.

Allison has spent her career at the intersection of philanthropy, technology, and organizational change, helping nonprofit leaders build data-driven cultures and structures that enable greater impact. She developed and authored this whitepaper as part of the practice's ongoing work helping organizations bridge the gap between strategy and execution.

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