



INSIGHT
PHILANTHROPY
RESULTS

EXPLORE

PD25

New Depths

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland

THE HUMAN SIDE OF SYSTEMS

Why Change Management Matters

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While you're waiting, complete your session evaluations in the mobile app!

PRESENTER



Allison Willner

Executive Vice President,
Systems & Change Management
CCS Fundraising





ABOUT CCS FUNDRAISING

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CCS FUNDRAISING

Mission: CCS partners with nonprofits for transformational change.

Values: As a firm, and as individual colleagues, CCS strives to embody excellence, professionalism, inclusion, and innovation in everything we do.



CCS FUNDRAISING SERVICES



CAMPAIGN MANAGEMENT



INTERIM DEVELOPMENT
MANAGEMENT



DATA ANALYTICS,
SYSTEMS, & RESEARCH



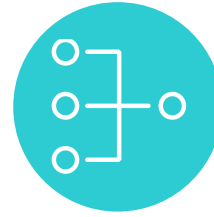
ASSESSMENTS & AUDITS



STRATEGIC PLANNING



TRAINING & LEADERSHIP
DEVELOPMENT



SPECIALIZED
DEVELOPMENT PROJECTS



PLANNING &
FEASIBILITY STUDIES



INTRODUCTION

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AUDIENCE PULSE

Who
enters
data?

*Entering actions,
gifts, proposals,
attributes, etc.*

Who
manages
data?

*Overseeing the
pipeline, updating
solicitations, etc.*

Who
uses
data?

*Receiving reports,
reviewing dashboards,
making decisions.*



LEARNING OBJECTIVES

In this session, we'll explore how the principles of change management, the human side of systems, and how you can:

- Socialize your solutions by devoting time and resources to training the team on your new way of working
- Use storytelling techniques to communicate the rationale behind process changes so they are easily understood, explained, and remembered



WHAT IS CHANGE MANAGEMENT?

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WHAT IS CHANGE MANAGEMENT?

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

- It is **proactive** and **ongoing**
- It applies to organizations and changes of **all sizes**
- It recognizes the **risk of both change and inaction**
- A thoughtful change management plan can **save you time, money**, and help you not only retain but **grow staff**, because even the most positive, welcome **changes are disruptive**



IN OTHER WORDS:

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

We paint the vision
of a better future,
and make a
commitment to
building it together

We invite everyone to
the table, and hear
their questions and
concerns

We think through
the “what’s in it for
me” and make the
case for working
differently



WHAT KIND OF CHANGE ARE WE TALKING ABOUT?

Rolling out a new set of metrics

Creating shared accountability for data management

Introducing a suite of reports for leadership

Introducing a 'data dictionary' with shared terminology

Incorporating new technology to support prospect development

Changing your organizational structure or operating model



WHY IS THIS SO IMPORTANT TODAY?

Our nonprofit clients and partners recognize the **importance of data-driven fundraising**.

93%

Of fundraising staff is knowledgeable about data-driven decision-making and CRM/database use

15%

of organizations report that **managing data (CRM)** is a top fundraising challenge in 2024, significantly down from 26% in 2023

14%

of organizations report **using data in decisions** is a top fundraising challenge in 2024, significantly down from 23% in 2023

However, **the reality is far from ideal:**

54%

of organizations report that **inaccurate or incomplete data** is their top challenge with donor data

30%

of organizations report that **not knowing what questions to ask / analysis to conduct** is their top challenge with donor data

9%

of organizations have **adopted AI applications** like **task automation** or **predictive analysis**

WHY MIGHT SOMEONE CHOOSE NOT TO CHANGE?



- Feeling comfortable with the status quo, or feeling change fatigued
- Failing to see the benefits (what's in it for them, and/or for the organization)
- Feeling excluded from the decision-making process
- Lack of communication or commitment from management
- Lack of confidence around technology
- Feeling underappreciated or threatened
- Resource constraints (time, money)



CATALYZING CHANGE

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CATALYZING CHANGE

“To get people to change, the advantages have to be at least twice as good as the disadvantages... if people have to give up something they like or lose things they value, the benefit (e.g., boosted efficiency, decreased cost, or some other positive change) has to be at least twice as big to make up for it.”

- Jonah Berger, The Catalyst

HOW CAN WE INCREASE THE LIKELIHOOD OF SUCCESS?

- Understand the **environment** we're operating in
 - The “right answer” might not be the right answer
- Understand the **perception of the current state**
 - What might we think is a pain point that isn't actually one at all?
- Have conversations that **involve all stakeholders**
- Illustrate **how each person fits** into the broader story



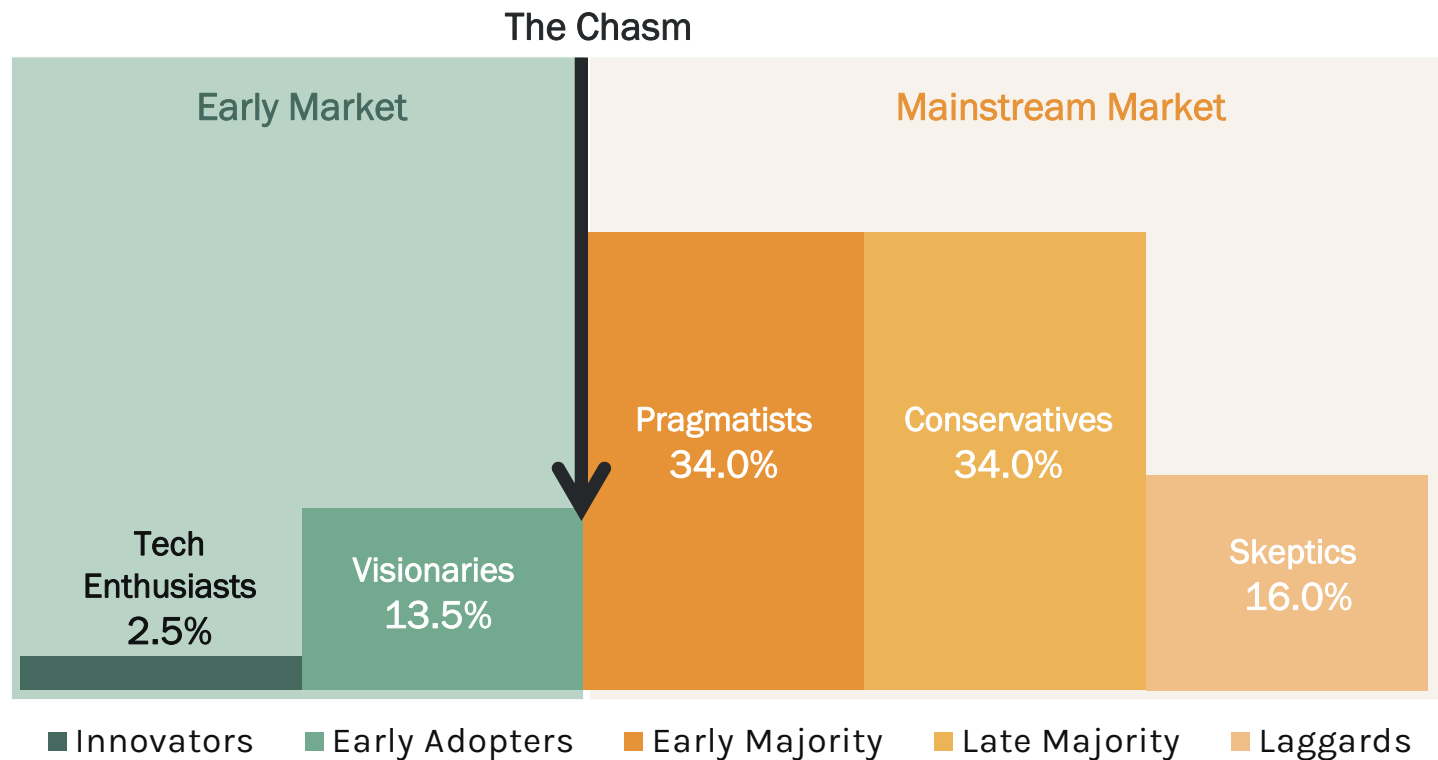
HOW DO WE INCREASE ADOPTION OF TECH?

- Understand your audience and **identify your champions**
- **Reduce uncertainty and** help people find their place
- **Use stories** to make the case for change
- Create **shared accountability** for success



UNDERSTAND YOUR AUDIENCE & IDENTIFY YOUR CHAMPIONS

Create incentives for early adopters, celebrate and share wins throughout to maintain momentum



REDUCE UNCERTAINTY

“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

For each audience, think through:

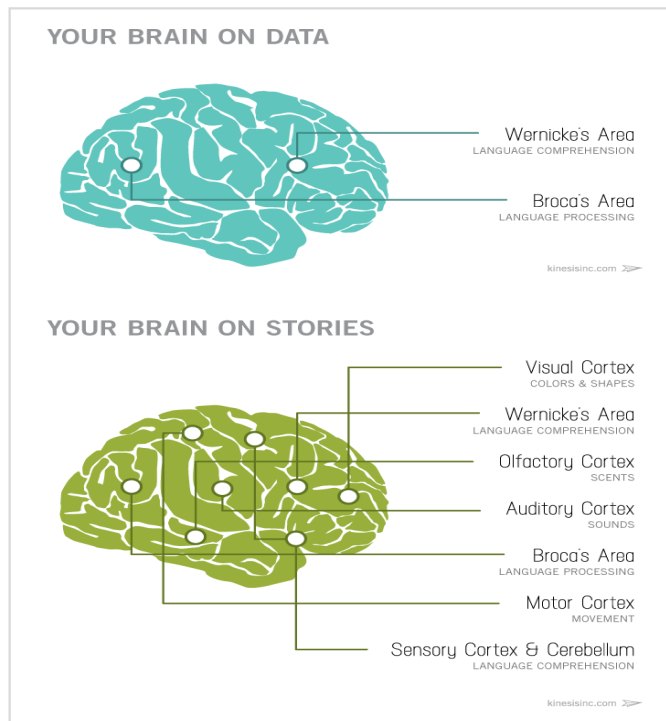
1. How will this change help me do my job better?
2. How much effort will it take before I realize gains?
3. Does our team have the tools we need to succeed?
4. Are others using the new system? Is leadership using it?

Play through scenarios start to end:

1. Use real-world examples where possible (create familiarity)
2. Tell the whole story (e.g., what happens with your Actions once you enter them?)
3. Create spaces to learn, and establish feedback loops
4. Use principles of ‘wayfinding’ to help people find where they belong in a process



USE STORIES TO MAKE THE CASE FOR CHANGE



- Make the future state at the end of the change process worth pursuing
- Address the emotions inherent with change
- Develop a narrative that anticipates and proactively addresses questions likely to arise:
 - When do I need to start working differently?
 - How will I know if I'm doing it right?
 - Who do I go to if I have a question?



CASE STUDY | HEALTHCARE ORGANIZATION

Partnership goal:

- To optimize the use of their CRM – increase adoption, forecast revenue in a way that aligns with finance, improve pipeline visibility

Solution:

- Created a ‘preamble’ that served as an on-ramp to each conversation, so wherever someone was coming from, they could orient themselves to the right conversation

Outcome:

- More productive meetings, better engagement

CREATE SHARED ACCOUNTABILITY FOR SUCCESS

Data stewardship is everyone's responsibility – what it looks like differs by role

For Leadership

Make a **visible commitment** to using data

Invest in the **team** (resources & training)

Understand the **process** is a journey

For Managers

Hold your team **accountable**

Use and improve tools and reports

Support your team as they learn

For Staff Entering Data

Raise **issues** as you encounter them

Commit to **continuous improvement**

Explain the **rationale** behind changes

CASE STUDY | MEDICAL FOUNDATION

Partnership goal:

- To design and implement streamlined business processes to coordinate activity between staff and teams

Solution:

- Conducted a workshop to talk through prospect management from identification to assignment, cultivation, solicitation and stewardship

Outcome:

- Identification of questions that could be addressed in the room, leading to a more thoughtfully designed process more likely to succeed



HOW CAN WE HELP EVERYONE SEE HOW THEIR WORK CONTRIBUTES TO YOUR ORGANIZATION'S SUCCESS?

- Make it visible
- Make a commitment to using it
- Make it a habit to provide context
- Use real world examples



WHAT CAN YOU DO TOMORROW?

When you want to introduce something new:

- Invite everyone to help design the future
 - Sell them on the vision
 - Make sure we're solving the right problem
- Tell them a story
 - What the future looks like
 - “What’s in it for me?”, and why the change is worth the pain
- Create space for ongoing dialogue and feedback
 - As an essential part of the process
 - Change takes longer than you think!



THANK YOU!

Please complete your session
evaluations in the mobile app.

An aerial photograph of a city grid, showing streets, buildings, and green spaces, rendered in a monochromatic green color.

aprc