



INSIGHT  
PHILANTHROPY  
RESULTS

# EXPLORE

PD25

*New Depths*

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



# FROM CHAOS TO CLARITY

Change Management Strategies for Prospect Development Teams

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

# TODAY'S AGENDA

Why do things Change?

Understanding the Project Management Cycle

Your Change Toolkit

Measuring Success

## OBJECTIVES

Personalized Change Roadmap

Practical tools for leading change





# ABOUT ME



Liz Hallett Mills

Director of Prospect Research and  
Portfolio Management at Roanoke College

Mom

DIY-er

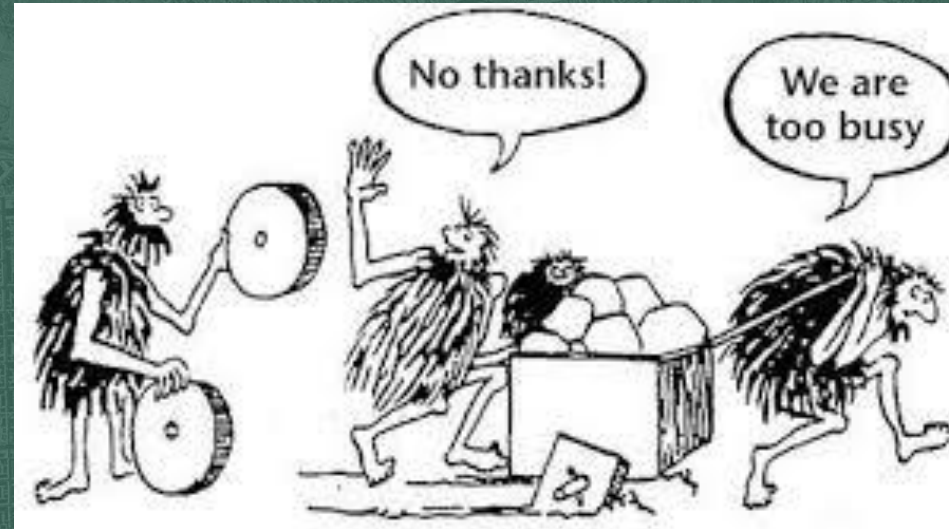
Musical Theater Nerd

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Act I, Scene I

# CHANGE



apra

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# ACCEPT THAT EVERYTHING CHANGES

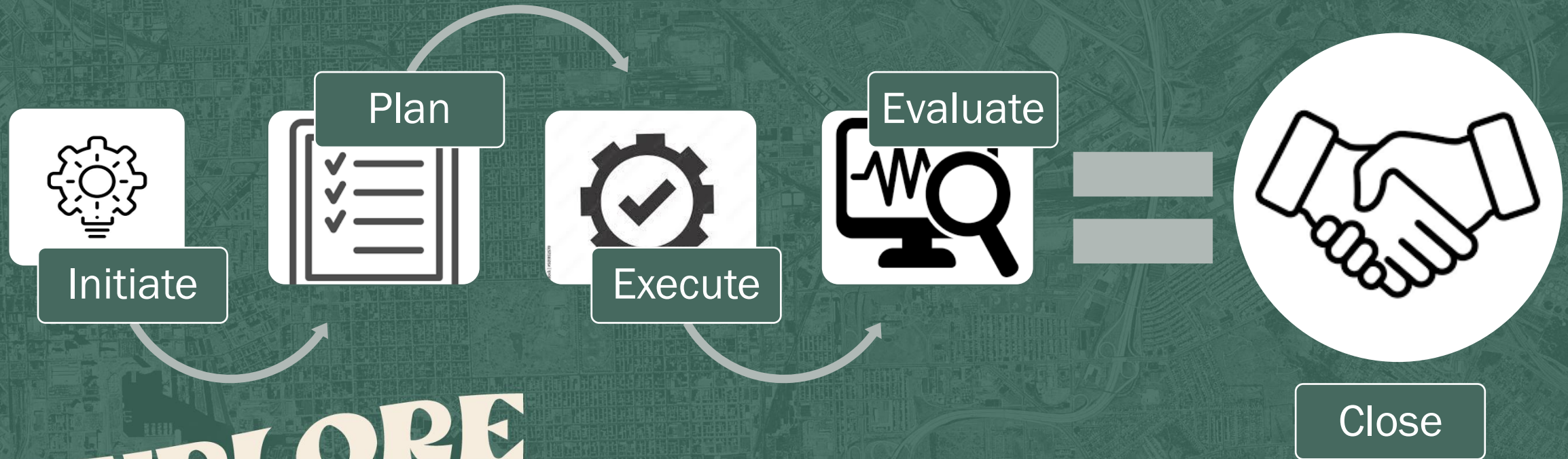
Change is good

Change is growth

Nothing changes, if nothing changes



# PROJECT MANAGEMENT CYCLE



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# WRITE YOUR SCRIPT

What is your Project

What is your Scope?

What is your Deadline?

Write a 2-sentence script: “Prospect Research are rolling out a new prospect entry workflow in the CRM to reduce manual entry and duplicate work. The goal is for the new process to auto-populate a new record in the prospect pool report with wealth rating, affinity score, and research notes.”



# RECRUIT YOUR CAST

Cast roles

Define Workflows



Lead (You)

Supporting actors (Project Research, Prospect Management)

Backstage crew (IT, Advancement Operations)

Audience (Gift Officers, Leadership)



# REHEARSE



## Training

Identify pain points, bottlenecks

Hear Feedback – Anticipate and mitigate risk





# OPENING NIGHT – GO LIVE

You don't rise to the level of your goals. You fall to the level of your systems.

- James Clear  
Atomic Habits

Examples:

Wealth Screening Integration

Campaign Launch

End of Year Proposal Cleanup

New CRM module





# CURTAIN CALL

Take a bow

Close the project

Measure, manage, and maintain



# REPORT ON OUTCOME

## Problem

- Gift officers relied on anecdotal knowledge rather than data to prioritize outreach.

## Change

- Prospect development led a comprehensive identification project, integrating scores into the CRM and dashboards

## Outcome

- 150 new high-capacity prospects were identified and assigned. 19 new \$100K+ gifts were closed in the following year.



# CHANGE TOOLKIT

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# TOOLS FOR THE TOOLBOX

CRM

Microsoft Teams

Asana

Monday.com

Trello

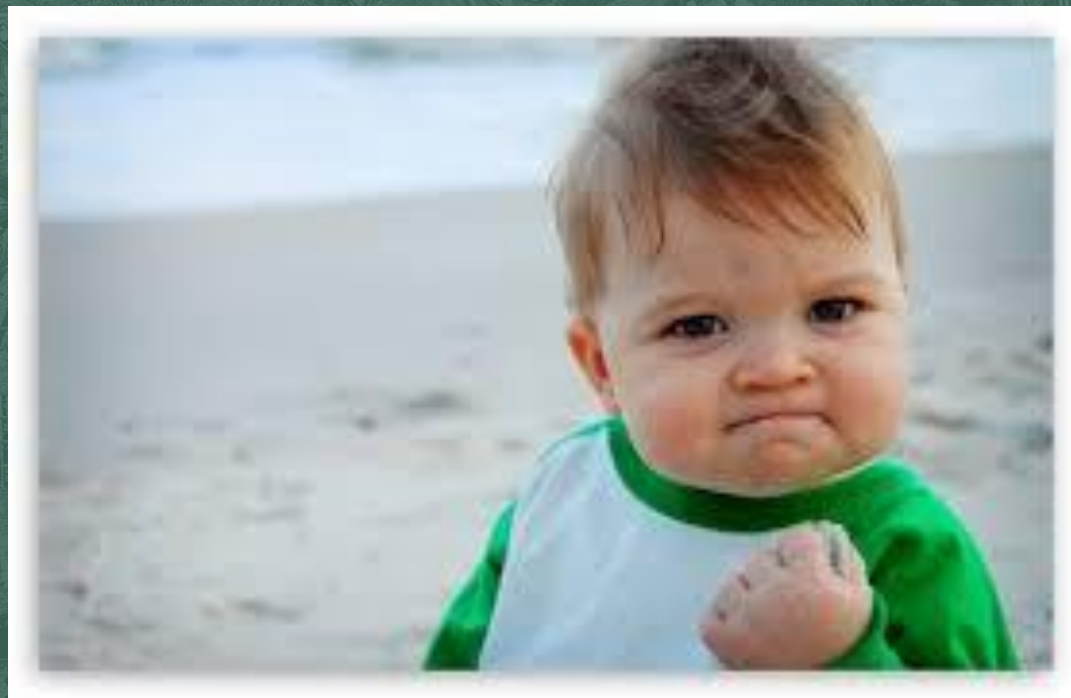




Curtain Call

# MEASURING SUCCESS

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# WHAT GETS MEASURED GETS MANAGED

Team Communication  
Performance Evaluation  
Informed Decision-Making  
Resource Allocation  
Accountability





# QUESTIONS?

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Keep in touch

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# THANK YOU!

Please complete your session  
evaluations in the mobile app.

