



Can You Rescue a Technology Project with Change Management?

It is never too late to re-assess where change management best practices can be useful - even long after go-live.

With Debbie Cameron and Carolyn Woodard





Learning Objectives

- Understand Change Management techniques.
- Learn why tech tools and projects fail.
- Discuss what you can still do later in technology projects.
- Learn tools and tactics to re-engage your team.
- Review real-world success stories



PRESENTER



Debbie Cameron

Partner
Build Consulting



About Build Consulting

What makes us different

500+
ORGANIZATIONS
SERVED

20+
AVERAGE YEARS OF
TEAM EXPERIENCE

501(c+)
EXCLUSIVELY
FOCUSED

Powered by Build's Change Management Framework™

Change can be complex, but it doesn't have to be chaotic. Build's Change Management Framework™ is embedded in our work.

Unparalleled Expertise

Our work is led by leaders with over 20 years of expertise with technology innovation and transformation for the largest nonprofits, associations, and foundations.

Exclusively Dedicated To Nonprofits

Nonprofits, foundations, and associations are at the heart of everything we do. It's not just part of what we do - it's our singular focus.

Passionately independent

We work for you—period. Unlike many firms, we do not accept incentives or align with vendors. Our recommendations are driven by what's best for your organization.

PRESENTER



Carolyn Woodard

Director of Marketing
Community IT



ABOUT US

Advancing mission through
the effective use of
technology.

communityit.com

100% employee-owned

Channel Partners.

MSP501

2025 WINNER



Mission:

Create value for the nonprofit sector through well-managed IT

Values:

- **Trust:** treat people with respect and fairness
- **Knowledge:** empower staff, clients, and sector to understand and use technology effectively
- **Service:** we seek to be helpful with our talents
- **Balance:** the health of our communities is vital to our well-being; work is only a part of our lives



Poll 1: Comfort Level with Change Management Techniques

1. Unfamiliar with Change Management
2. Have worked with someone who used Change Management tools and techniques
3. Have used Change Management techniques myself
4. Change Management super user myself
5. Not applicable/other (put in chat!)



Our agenda

1. Why projects and tools fail
2. What you can do now ... even if it's late in the project
3. Tools and tactics to re-engage your team
4. Real-world success stories
5. Q&A





**Tomorrow's best nonprofits will use technology
to transform themselves ... and the world.**

build
capacity is our mission



**And yet, more than 50% of
nonprofit technology projects fail.**

The technology moves forward ... but the organization does not.


$$\begin{array}{r} OO \\ + NT \\ \hline = EOO \end{array}$$

Technology strategy is organizational strategy.

OLD ORGANIZATION + NEW TECHNOLOGY = EXPENSIVE OLD ORGANIZATION

The Problem

We make technology changes without properly considering the impacts **on the people affected.**

Those impacts **disrupt the results** we want.

What is Change Management?

”Change management is the discipline that guides how we **prepare, equip and support individuals to successfully adopt change** in order to drive organizational success and outcomes.”

- Prosci

Do I need change management?

If your technology change **requires people to adjust their behavior** in order to achieve your goals....you need change management.

What if I didn't use change management?

- No time
- No capacity
- No buy-in
- Didn't know where to start

"You can't go back and start over—but you can start now and change the ending."

- It's never too late
- Start small
- Rebuild trust
- Iterate and engage

Thought Question

In a nutshell, what went wrong with your last technology project?

Why Projects Go Off Track?

Even with the best intentions, projects can veer off course. Here are five common reasons why:

- **No Stakeholder Engagement**

- Decisions are made in a vacuum. When the people impacted by the change aren't involved early, their needs get missed—and trust erodes.

- **No Change Readiness Assessment**

- We skip the temperature check. Without understanding how ready people are for change, we risk pushing forward without the support we need.

- **No Adoption Plan**

- We work toward and celebrate go-live, but forget what comes next. Without a plan for how people will actually use the new system, adoption stalls.

- **No Feedback Loops**

- We don't ask, listen, or adjust. When feedback isn't built into the process, we miss opportunities to course-correct and improve.

- **No Leadership Alignment or Lack of Sponsorship Support**

- Leaders aren't on the same page. Mixed messages and unclear priorities confuse teams and slow progress.

What You Can Do Now

- **Create the Vision**
 - Clearly communicate where we are heading
- **Re-engage Stakeholders**
 - Bring people back into the conversation. Ask what's working, what's not, and what they need to succeed. Listen!
- **Assess Readiness and Sentiment**
 - Take the pulse of your team. Are they confused? Frustrated? Hopeful? A quick survey or listening session can reveal a lot. Ask for their opinion!
- **Create a Mini Change Plan**
 - You don't need a 50-page document. A simple plan with clear actions, owners, and timelines can go a long way.
- **Apply Structure to Adoption Planning**
 - Define clear expectations and measurable outcomes to guide and evaluate user adoption efforts.

CHANGE MANAGEMENT IN ACTION

How do I accomplish those things?



Create the Vision

Tools: Change Vision Session/Board



Create a Mini Change Plan

Tool: Change Definition Canvas



Re-engage Stakeholders

Tools: Stakeholder Matrix + Listening Sessions



Apply Structure to Adoption Planning

Tool: Adoption Plan



Assess Readiness and Sentiment


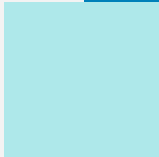

Tool: Change Readiness Survey



Create the Vision

Tools: Change Vision Board

- Help everyone understand the change by using a visual framework that shows who's involved and what's changing.
- Use clear language to outline the current state and the future state to clarify the change
- Create transparency is the drivers and case for change
- Acknowledge the challenges and talk about how we can overcome them



The Vision
Current State > Future State
Drivers for Change
Case for Change
What Holds us Back?
How can we overcome?

Re-engage Stakeholders

Tools: Stakeholder Matrix

- Map who is impacted by the change
- Connect each person to a clear point of contact

Stakeholder Name	Title	Department	Stakeholder Interview Participant (Y/N)	Project Representation	Predisposition	Influence Level	Expected Impact	Anticipated Issues	Motivation/Drivers
					Supportive		Medium		
			Yes		Neutral		High		
			Yes		Neutral		Medium		
			Yes		Neutral		Medium		

Stakeholder Name

List people who will be touched by the change.

Project Representation

Ensure all those impacted have a representative involved in the project.

Motivators/Drivers

Note any motivators or anticipated resistance.



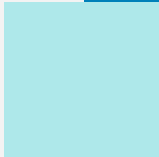
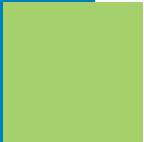
Re-engage Stakeholders

Tools: Listening Sessions

- Ask what is helping and what is getting in the way
- Hold listening sessions to hear concerns and rebuild trust
- Wrap the listening session with an interactive 3 question engagement survey using a QR code



Sample Questions:

- 
1. On a scale of 1 – 10 how are feeling about this project?
 2. What influenced your choice of rating?
 3. Please share would could make it 1 point higher?
- 

Assess Readiness & Sentiment

Tools: Change Readiness Survey

A tool that is used to assess how prepared an organization or team is for an upcoming change, identifying potential challenges, attitudes, and areas needing support.

- Use a short survey to gauge how people feel about the change
- Use the results to decide where to focus energy, time and support.

SPONSORSHIP EFFECTIVENESS

ORGANIZATIONAL CHANGE HISTORY

LEADERSHIP ALIGNMENT

ORGANIZATIONAL PROJECT MANAGEMENT CAPABILITIES

OPERATIONAL CAPACITY

CHANGE READINESS

STRATEGIC ALIGNMENT

ORGANIZATIONAL AGILITY



Change Plan

Create a simple change plan to guide your next steps

A tool that outlines the strategies, actions, and tools needed to guide individuals and organizations through a successful transition, ensuring adoption, minimizing resistance, and sustaining long-term outcomes.

CHANGE FRAMEWORK

CHANGE JOURNEY

APPROACH & TIMELINE

TIMELINE

TOOLS

MANAGEMENT & OVERSIGHT

Elements of a Change Plan

Change Framework

Outlines the foundational methodology guiding the change, providing structure and alignment with best practices (e.g., ADKAR, Kotter) to support successful adoption and sustainability.

Change Journey

Maps the stakeholder experience from current state to future state, identifying key milestones, moments of support, and opportunities to build buy-in and engagement.

Approach

Defines the overall strategy for leading and managing the change effort—tailored to organizational culture, readiness, and the scale of the change.

Timeline

Provides a structured view of change management activities in alignment with the broader project timeline, including planning, engagement, training, and reinforcement phases.

Tools & Intervention Techniques

Details the practical tools from the change management toolkit and the techniques used to build readiness, reduce resistance, and support adoption—such as coaching, listening sessions, and targeted communication.

Management & Oversight

Change can be challenging, and a positive outlook helps keep
Defines governance, roles, and accountability structures to ensure the change effort stays on track, is aligned with project goals, and is continuously evaluated and adjusted as needed.



WHAT'S INCLUDED

Adoption Plan

Outlines the strategy and steps required to ensure successful user adoption of new processes or tools within the organization.

OVERVIEW

BRANDING THE SYSTEM & ITS CULTURE

BEHAVIORAL EXPECTATIONS

LONG-TERM CHANGE OBJECTIVES

SHORT-TERM CHANGE OBJECTIVES

KPI TRACKING AND EVALUATION

USER SATISFACTION SURVEYS

LEADERSHIP ALIGNMENT

ADOPTION RISK LOG

Short-term Objectives: Actions of the Plan



KPI Tracking and Evaluation

(Goal, Metric, Target, Starting Point, Milestone Dates, and Results Evaluation)

Outlines how success will be measured in the short term, including setting clear goals, defining metrics, and identifying key milestones to track progress.

User Satisfaction Surveys

Help gather valuable feedback on the adoption experience, identifying immediate areas for improvement and ensuring a positive transition.”

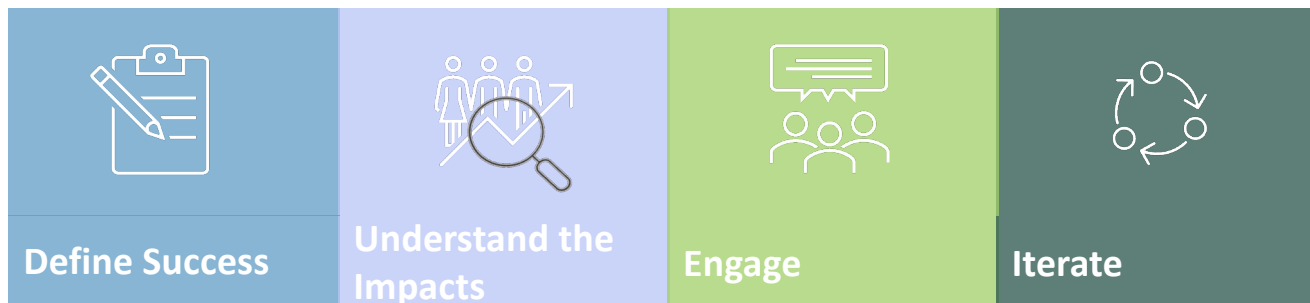
Leadership Alignment & Actions

Ensure that leadership is consistently reinforcing the change, providing a unified message and maintaining momentum throughout the adoption process.

Adoption Risk Log

Tracks potential challenges and obstacles, allowing the team to proactively identify and mitigate risks that may hinder adoption success.

BUILD CONSULTING CHANGE MANAGEMENT FRAMEWORK



What if I inherited a mess?



- Don't Panic!
- Start with: Listening sessions
- Build a Stakeholder matrix
- Leverage a change readiness survey
- Identify quick wins to rebuild trust

It's NEVER too late to introduce change management!



- Start small
- Iterate
- Build trust

Impact Using an Impact Analysis



THE STORY

A nonprofit spent nearly two years developing a new CRM system, focusing almost entirely on the technical aspects to ensure a smooth go-live. The team worked tirelessly to configure the system and prepare for launch. When the day arrived, they celebrated, confident that the hard work would immediately pay off.

But after the initial excitement faded, it became clear that something was wrong—no one was using the system. Employees were confused, disengaged, and unsure how the new CRM fit into their daily work. Leadership had no visibility into user challenges, and there was no clear plan to support adoption. Change management had been overlooked.

Recognizing the issue, the organization pivoted. They launched a targeted change management initiative.

Actions Taken

- Help desks and office hours were set up to provide hands-on support.
- Lunch & learns and job aides helped users understand the system's value.
- Leaders began modeling the desired behaviors, reinforcing the change from the top.
- A feedback loop was created to surface user concerns and iterate quickly.

Build's Change Management Resources

<https://buildconsulting.com/blog/category/change-management/>

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project?

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Q & A



Where
Technology
Meets Mission

build

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What Are Cybersecurity Essentials for Nonprofits?

With Matthew Eshleman, CTO Community IT,
Ian Gottesman, NGO ISAC, and guests.
October 15 from 3-4pm Eastern, Noon Pacific via Zoom



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