



MAY 5-7, 2025

**INNOVATE**

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THE EXPERTS IN  
MISSION-DRIVEN  
NONPROFIT FINANCE

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# Mission-Driven Strategic Planning for Finance Leaders

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# Presenters



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Controller  
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# Learning Objectives

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- ✓ Define mission-driven strategy
- ✓ Determine how the CFO can contribute to a mission-driven strategy
- ✓ Understand scenario planning to navigate current economic volatility

# Agenda

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- ✓ CFO's Changing Role
- ✓ Mission-Driven Strategy
- ✓ On-going Alignment of the CFO Role to Mission



# The Different Roles of the CFO

Historian/Responder

Challenger

Architect

Transformer

# FINANCE LEADERSHIP 1.0

## Role: Historian/Responder

Document the past with precision  
and accuracy

2010

2011

2012

The CFO and finance team support  
the organization with reports of  
data/results, typically rearview.





# FINANCE LEADERSHIP 2.0

## Role: Challenger

Leveraging data and analytics  
to drive transformation  
in real-time

Leading the future to ensure the future



FINANCE  
LEADERSHIP



3.0

## Role: Architect/Transformer

Strategic leaders that will drive the organization to new heights; empowering finance to be masters of the future





# Attributes of the CFO Role

	Permission	Typical Context	Required Finance Capability	Required Organizational Capability
Responder	Generally low permission from CEO for CRO to engage in strategy	Highly decentralized; other managers/board primarily responsible for strategy	Strong centralized FP&A capabilities	Strong strategy capabilities
Challenger	Strong permission from CEO for CFO to challenge	Decentralized; other managers/ directors work with	Strong FP&A and accounting systems to evaluate results	Strong strategy capabilities
Architect	Acceptance by managers in strategy process	Finance is already viewed as a partner within the organization	Strong finance capabilities, complemented by strong FP&A skills	Strong partner
Transformer	Strong permission from CEO and board	Finance is a key partner in strategy	Strong CFO capacity to influence the business	Capacity to change systems, processes, etc. as needed

What is your  
perspective on the  
role of the CFO in  
strategic planning?

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Brian Chan

Controller

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# Polling Question

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Which role is best aligned with a strategic CFO?

- A. Responder
- B. Challenger
- C. Architect
- D. Transformer
- E. Gymnast
- F. All of the Above

# The Most Effective CFO....

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- Is one who is agile
- Able to cross roles as needed (Responder, Challenger, Architect, and Transformer)





In what ways has  
your organization  
had to pivot its  
strategy due to  
unforeseen  
financial constraints  
or opportunities?

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**Brian Chan**

Controller

Samaritan House San Mateo



# Old Way of Handling the Finance Function vs. the "New Norm"

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## OLD WAY

- Weekly and monthly reporting
- YTD performance and annual outlook
- Investments and decisions based on long term goals
- Technological and digital growth strategies

## NEW NORM

- On-demand finance function and continuous reporting
- Daily, multi-dimensional reporting and focus on 13-week cash flows
- Re-evaluate contingencies, scenario planning, focus on current ROIs and KPIs
- Technological and digital optimization strategies - "more with less"



# CFO & Finance: Yesterday vs. Today

- More than Operations. She is a **strategist**, she **promotes change**, and she is a **consiglieri** to the CEO
- Focus on how to **create sustainable business models**
- **Need for increased communication** and flexible collaboration
- After adjusting to the “new norm”, **improved collaboration** and implementation strategies
- **Strategy under Uncertainty**: without perfect data, how do you continue moving towards your “North Star”?

# Agenda

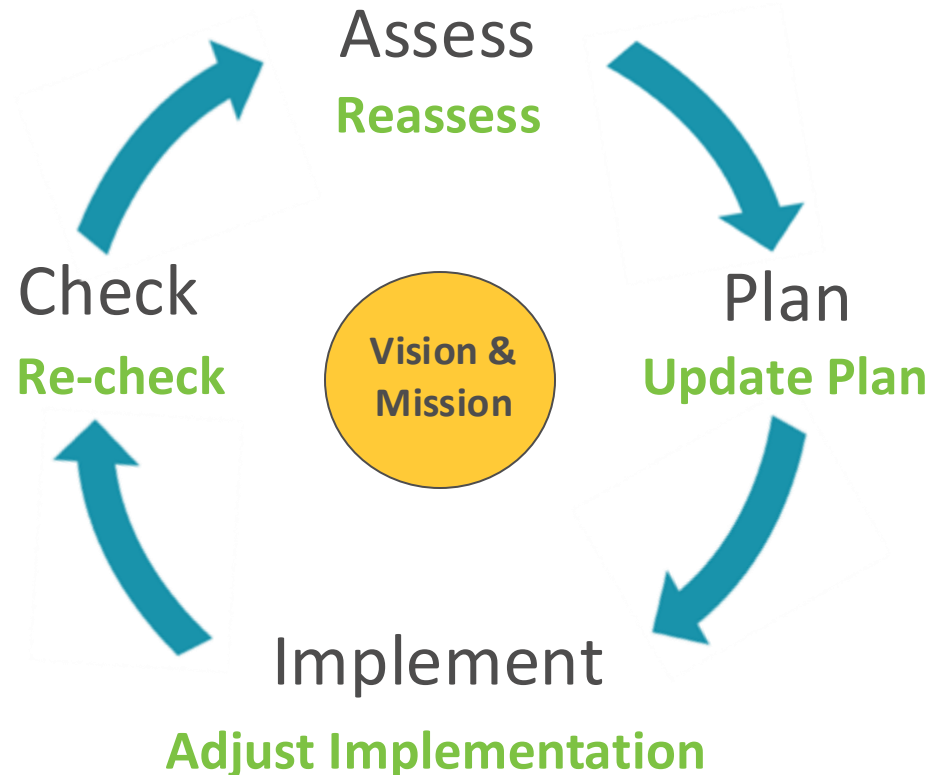
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- ✓ CFO's Changing Role
- ✓ **Mission-Driven Strategy**
- ✓ On-going Alignment of the CFO Role to Mission

# What is Strategic Planning?

Strategic planning is the creation of a plan to get an organization from where it is now to where to wants to be tomorrow.

# Old vs New Strategic Planning





# What is *Mission-Driven* Strategy?

- Reinforces and **advances mission** impact
- Grounded in an accurate understanding of the **current state** (internal and external) informed by relevant, diverse stakeholders
- Orients to a **compelling vision** of the ideal future state
- Identifies **paradigm shifts** that describe the organization's transformational imperative
- Defines **strategic directions and priorities** to leverage strengths, shore up gaps, take advantage of opportunities, and mitigate threats to achieve the Vision
- Seeks to **align organization's core work** to advance mission, priorities, and goals
- Takes into consideration **cultural and leadership readiness**
- Defines actionable, measurable **outcomes**
- Plans for **accountability**

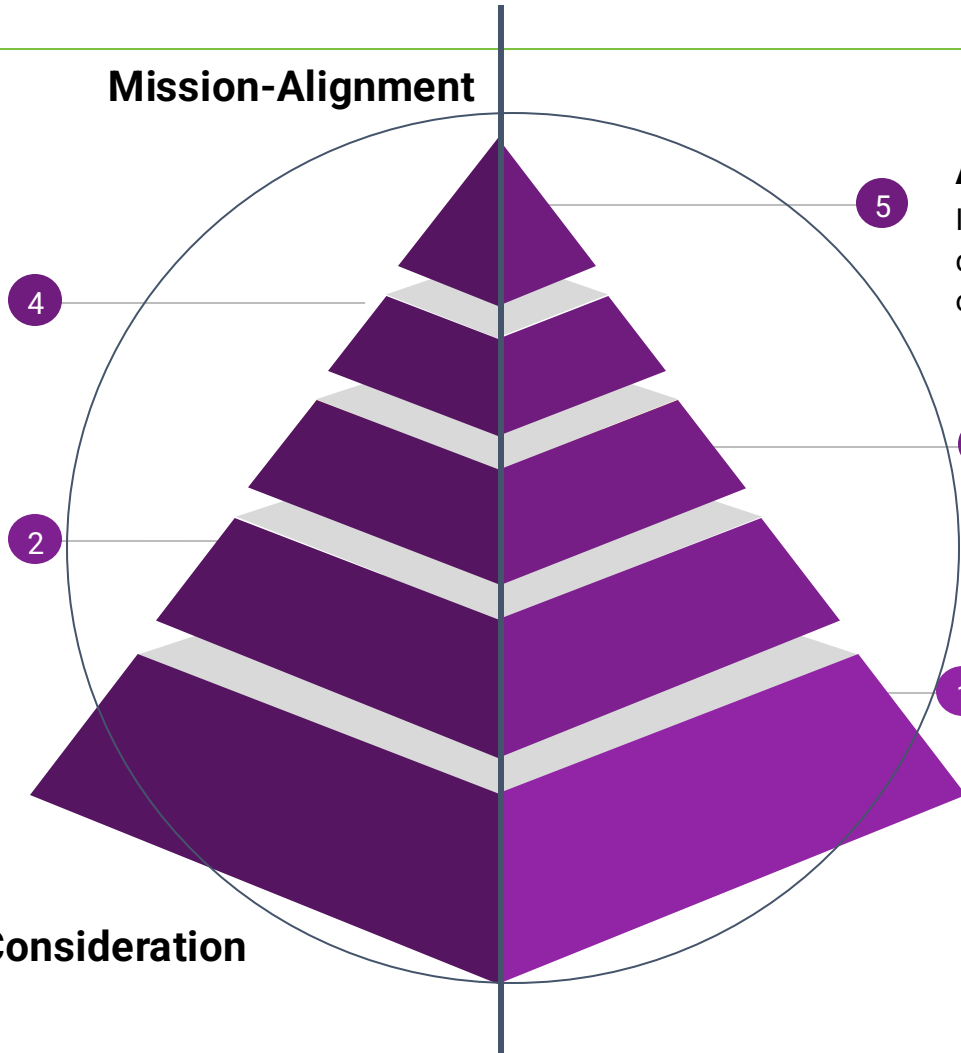
# Mission-Driven Methodology

## Mission-Alignment

**Paradigm Shifts**  
Distill insights and paradigm shifts from key findings to challenge assumptions and present new possibilities for organizational evolution

**Current State Assessment**  
Use Mission-Driven vs Mission-Challenged assessment, SWOT analysis, etc. and best practices benchmarking to accurately diagnose the situation to address

**Cultural & Leadership Consideration**



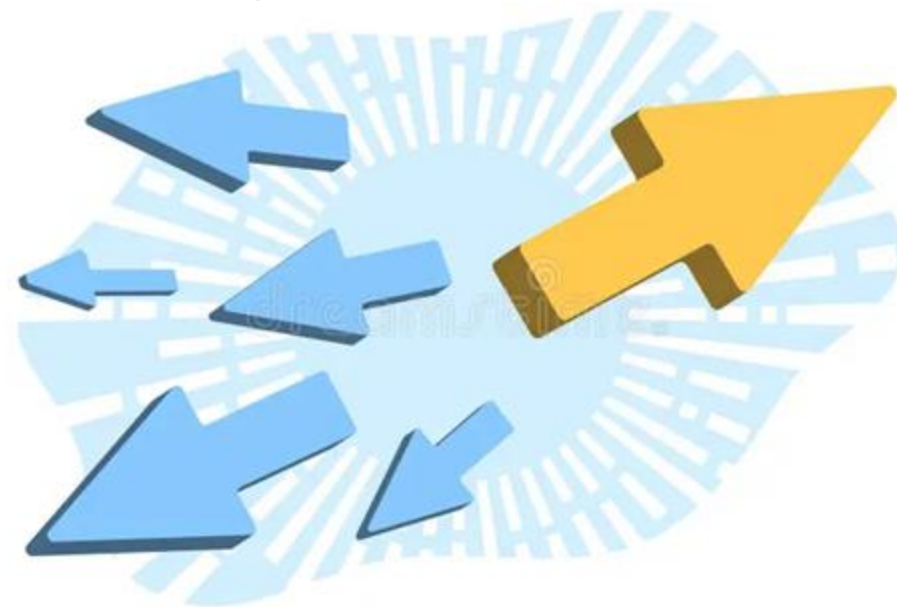
**Accountability for Implementation**  
Integrate processes and tools to support development of measurable outcomes, clear ownership, and standards for tracking and reporting.

**Ideal State Orientation**  
Engage diverse stakeholders and leadership in developing a vision of the ideal future state towards which the organization is driving

**Discovery: Research Base**  
Use qualitative & quantitative research to understand the current state of the organization and the environment in which it operates

# Paradigm Shifts

- Define the **core changes** “from” the current state situation “to” an ideal **future state** to achieve -- or make progress towards -- by the end of the strategic plan term.
- Key to **driving cultural, ideological, and behavioral change** within an organization. Paradigm shifts are primarily for internal use but can be communicated publicly to an organization’s stakeholders.



# Paradigm Shifts

Undertaking a paradigm shift means more than just trying to move the organization from Point A to Point B. It means understanding why you need to take a revolutionary leap forward and formulating the right plan.

So an organization has to be ready to ask tough questions such as:

- “What is our potential—and are we reaching it?”
- “How can we maximize our relevance to stakeholders?”



# Mission-Driver Response Continuum

## REACTIVE

- Urgent situation
- High emotion
- Critical and timely actions needed
- Short-term perspective
- Focus on minimizing damages and loss

## RESPONSIVE

- Timely situation
- Situation assessment
- Anticipate change needed to respond and adapt
- Consider variety of perspectives
- Tempered approach demonstrates thoughtful analysis

## GENERATIVE

- Emerging opportunities
- Long-game planning
- Bring to focus a vision not yet realized
- Emotion and cognition integrated
- Focus beyond immediate priorities
- In-depth research informing scenario planning

# Polling Question

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What do you believe is the order of importance when it comes to your organization's mission and its strategic planning?

- A. Financial needs, Strategic priorities, Mission
- B. Mission, Financial needs, Strategic priorities
- C. Strategic priorities, Mission, Financial needs
- D. Mission, Strategic priorities, Financial needs
- E. Financial needs, Mission, Strategic priorities



# Polling Question

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If mission is important in driving strategy, what are the mission drivers?

- A. Doing what we are known for
- B. Doing what we do best
- C. Doing what we have the resources for
- D. Doing what people are giving to

# Scenario Planning

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01

Define key  
variables and  
risks.

02

Build your  
ABC  
scenarios.

03

Financial  
resilience and  
budget  
adjustments.

04

Operations and  
programs  
adjustments.

05

Stakeholder  
communication  
strategy.

06

Monitoring and  
continuous  
improvement.

# Mission-Driven + Scenario Planning



## PROVIDES A NORTH STAR FOR UNCERTAINTY

Keeps planning centered on  
core purpose amidst multiple  
futures



## SHAPES CRITERIA FOR DECISION-MAKING

Aligns options with long-  
term impact and purpose



## GUIDES EVALUATION OF TRADE-OFFS

Filters choices based on  
mission outcomes



## INFORMS STAKEHOLDER ENGAGEMENT

Resonates with stakeholders  
and their commitments



## ENABLES PURPOSE-DRIVEN INNOVATION

Encourages new thinking  
that serves the mission

# Agenda

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- ✓ CFO's Changing Role
- ✓ Mission-Driven Strategy
- ✓ **On-going Alignment of the CFO Role to Mission**

# How Does the CFO Contribute?



## Mission/Vision

Are the goals of the mission/vision financially viable?



## Program/Service

What and how are programs and services funded?  
Contracts, grants, unrestricted revenue?



## Systems/Processes

What financial and management reporting enables management to effectively execute and deliver the strategy?

# Polling Question

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Thinking about your organization's mission, its programs and systems, which of the below is needed most for your organization?

- A. Agility to meet changing needs
- B. Board and Exec support to redefine and transform
- C. Visibility to information to pivot as needed for decision-making
- D. Technology to support above
- E. All the above



# In Closing

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- The CFO's role in strategic planning is vital
- Engage in a methodology that is mission-driven
- Understand how finance will support contribute and contribution to the success of the plan
  - ✓ Mission & Vision
  - ✓ Programs & Services
  - ✓ Systems & Process



# THANK YOU!

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