



MAY 5-7, 2025

INNOVATE

JMT CONSULTING

NASHVILLE

People First: Human-Centered Strategies for Organizational Success

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Dr. Stephanie Rose-Belcher
COO - JMT Consulting

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Director of Human Resources - JMT
Consulting





What Is Human-Centered Design?

A process of inspiration, ideation, and implementation that relies on the employee as an active and empowered participant throughout the design and decision-making process, rather than giving limited input or only being informed of decisions, programs, or policies after the fact.



Operational Effectiveness: Can we lighten the employee lift?

- Map the Inefficiencies
 - Where are we duplicating efforts?
 - Go “upstream”
- Evaluate the Work - Not Just the Workload
 - Make continuous reflection part of the culture



Task evaluation model

Task/Need Area	Current Owner	Time Spent (hrs/week)	Pain Points	Can Be Streamlined? (Y/N)	Automation Options	Cost to Automate/Fix	Cost to Hire (FTE or Contractor)	Recommended Action
Accounts Payable (AP)	Staff Accountant	20 hrs/week	Manual entry, duplicate approvals	Yes	Bill.com, ERP AP workflows	\$55 Per User PM	\$25,000/year (50% FTE)	Automate + Hire (partial)
Expense Reimbursements	Staff Accountant	5 hrs/week	Chasing receipts, inconsistent formats	Yes	Databasics, Expensify	~\$2,000/year	N/A	Automate
Budget Tracking & Reporting	Finance Director	6 hrs/week	Too many spreadsheets	Yes	Vena, Martus, Velixo, dashboards	\$5,000–15,000	N/A	Automate
Budget vs Actual Reporting	Finance Director	10 hrs/week	Manual Process	Yes	Dashboards	included in Intacct	NA	Provide insight to department heads inside system
Grant Reporting & Allocations	Staff Accountant	8 hrs/week	Manually pulling GL reports	Yes	GL tagging + ERP reporting	Internal setup	\$40,000/year (junior hire)	Automate or Hire PT



Operational Effectiveness: Can we lighten the employee lift?

- Make Better Use of Existing Tools
 - Workflows, Automation, Information Sharing



Operational Effectiveness: Meet your users where they are

Search EfficientOffice

BambooHR ▾

Messages About

Javier 7:42 AM
Who is Panu?

BambooHR APP 7:42 AM
I think you are asking about Panu:

Panu Puikkonen
VP of Marketing
Marketing Department
North America Division
Lindon, Utah Office

Email
ppuikkonen@efficientoffice.com

Office Phone
801-724-6600 x 1280

Mobile Phone
435-555-8088

LinkedIn
www.linkedin.com

Send a message to BambooHR

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BambooHR ▾

Messages About

Javier 7:47 AM
How much time off do I have?

BambooHR APP 7:47 AM
Looking to take some time off? Here's your time:

Sick
40.00 hours available

Vacation
28.47 hours available

Volunteer
12.00 hours available

Send a message to BambooHR

Search EfficientOffice

BambooHR ▾

Messages About

Javier 6:27 PM
Who's out?

BambooHR APP 6:27 PM
There are **11 people** out today in EfficientOffice.

- Bob Jackson Oct 18 - 22
- Bob Jackson Oct 13 - 27
- Christina Agluinda Oct 20 - 22
- Clark Fuller Oct 19 - 20
- Darlene Handley Oct 13 - 27
- Dorothy Chou Oct 13 - 20
- Jim Harris Oct 13 - 20
- Leslie Kay Oct 19 - 22
- Omar Baldwin Oct 18 - 21
- Shannon Anderson Oct 20
- Yasmine Dean Oct 18 - 29

Send a message to BambooHR

Collaboration, Communication, & Change Management

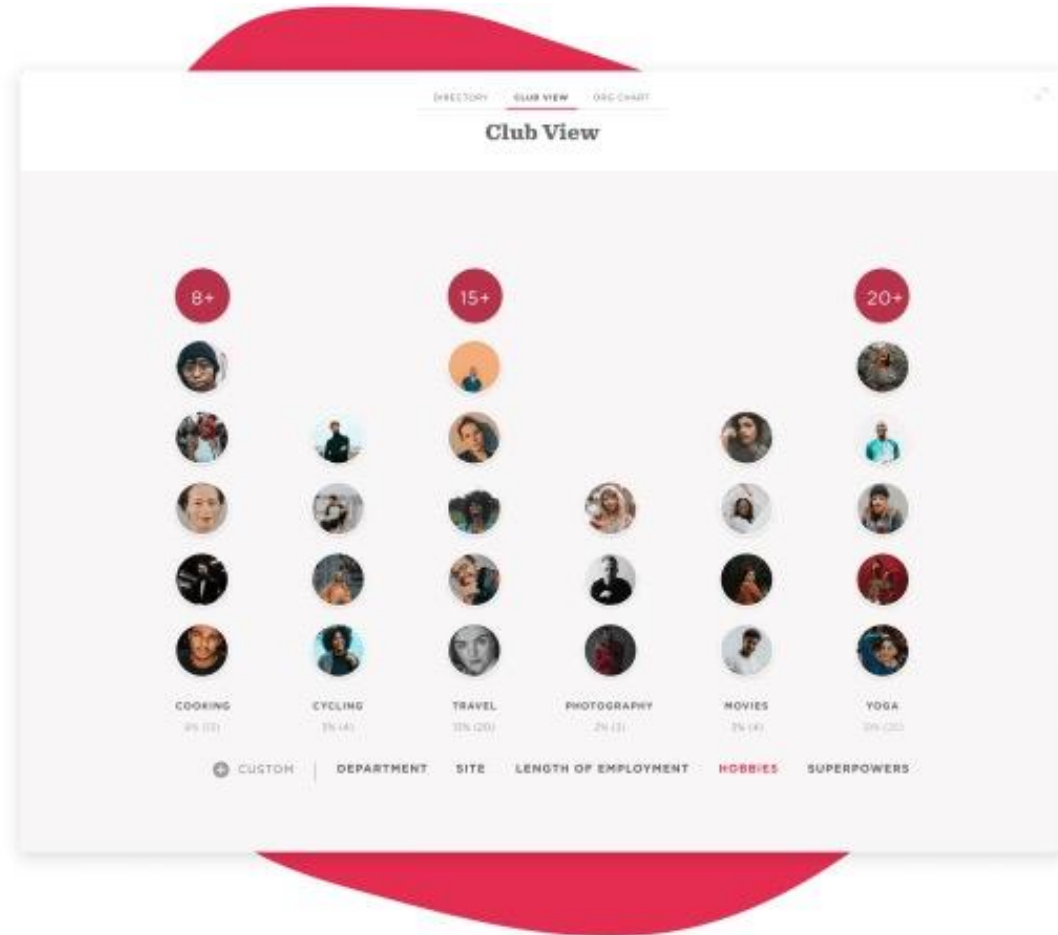


Collaboration	Communication	Change Management
Create and publish a RASCI	Know your audience	Perform a Change Impact Assessment
Establish a tool for shared workspace	Know your Message	Establish Stakeholder buy-in and participation
Meeting/Update cadence	Define delivery channels	Provide Training and Support Processes to
Define decision making protocols and authority levels	Define the Frequency	Develop Resistance Management Techniques - including turning detractors to champions
Develop conflict and escalation resolution pathways	Establish Communication Owners	Monitor and Report Success Metrics

Continuous Quality Feedback Loop ensures that these approaches are monitored, maintained and improved



Operational Effectiveness: Facilitate Effective Collaboration





Process Maps and NVA Analysis

What to Include in Your Process Map:

1. **Trigger** – What starts the process? (e.g., signed offer letter)
2. **Steps** – List in sequence, including who does what
3. **Tools** – What platforms or systems are used?
4. **Hand-offs** – Where does the task move between people/teams?
5. **Pain Points** – Note where confusion, delay, or frustration happens

Ideas for Improvement – Add quick wins or ideas in the margins

Methods for Process Evaluation

Lean

- **Focus:** Eliminating waste (non-value-added activities).
- **Key Tools:** Value Stream Mapping, 5S, Kaizen, Kanban.
- **Origin:** Toyota Production System.

Six Sigma

- **Focus:** Reducing process variation and defects.
- **Key Tools:** DMAIC (Define, Measure, Analyze, Improve, Control), statistical analysis.
- **Origin:** Motorola, popularized by GE.

Lean Six Sigma

- **Focus:** Combines Lean's efficiency with Six Sigma's quality control.
- **Key Tools:** Both Lean and Six Sigma tools.
- **Use Case:** Broad organizational improvement.

Total Quality Management (TQM)

- **Focus:** Organization-wide commitment to continuous improvement and customer satisfaction.
- **Key Tools:** PDCA (Plan-Do-Check-Act), Quality Circles.
- **Philosophy:** Everyone is responsible for quality.

Kaizen

- **Focus:** Continuous, incremental improvements.
- **Key Tools:** Gemba Walks, suggestion systems.
- **Origin:** Japanese business culture.

Business Process Reengineering (BPR)

- **Focus:** Radical redesign of core business processes for dramatic improvements.
- **Approach:** Start from scratch (not incremental).
- **Use Case:** When existing processes are fundamentally broken.

Agile

- **Focus:** Flexibility, customer feedback, iterative development.
- **Key Tools:** Scrum, Kanban, sprints.
- **Common In:** Software development, product management.

Theory of Constraints (TOC)

- **Focus:** Identifying and addressing the most limiting factor (constraint) in a process.
- **Key Tools:** Five Focusing Steps, Drum-Buffer-Rope.
- **Goal:** Maximize throughput.

PDCA Cycle (Deming Cycle)

- **Focus:** Iterative problem-solving for continuous improvement.
- **Steps:** Plan → Do → Check → Act.
- **Use Case:** Quality improvement in any industry.



Technology and Tools Evaluation Matrix

According the State of Software Happiness Report 2019 from G2:

- 52% of workers said they have "become dissatisfied at work due to missing or mismatched software"
- 24% of respondents said they have "considered looking for a new job" because they "didn't have the right software"
- 13% of employees said they have actually left a job because of the software their employer required them to use

Technology Evaluation Tool



Part 1: General Information

Tool Name: _____

Evaluator Name: _____

Date: _____

Type of Tool (e.g., Word Processor, Spreadsheet, Email Client,
Project Management Software, ERP, Financial Applications, etc):

Primary Purpose of Use (*Modify as Needed*):

☐ Document Creation

☐ Data Management

☐ Communication

☐ Scheduling

☐ Project Tracking

☐ Other: _____

Part 2: Ease of Use

Item	Rating (1–5)	Comments
The interface is intuitive and user-friendly.		
Tasks can be completed with minimal training.		
Help and support features are easy to find and useful.		
Navigation within the tool is logical and efficient.		
Error messages and system feedback are clear.		



Part 3: Automation Capabilities

Item	Rating (1–5)	Comments
The tool supports task automation (e.g., macros, rules, workflows).		
Automation setup is user-friendly and does not require coding knowledge.		
The tool integrates easily with other applications (e.g., APIs, plug-ins).		
The automation reduces manual effort and increases productivity.		
The automation is reliable and consistently functions as expected.		

Part 4: Overall Assessment

Overall Ease of Use (1–5): _____

Overall Automation Capability (1–5): _____

Would you recommend this tool to others?

☐ Yes ☐ No ☐ Maybe

General Comments or Suggestions for Improvement:

Effective Recruiting & Retention





Hone the Hiring Process

- Take a moment to plan the whole applicant experience
- Plan for skills based hiring and evaluation
- Develop a Talent Pipeline
- Alternative Sourcing
 - The Mom Project
 - Plus One Collective
 - Internships- CPA Candidates



Are you actually
describing the *real* job?

Human Centered Hiring



Easy Application Process



- Mobile-friendly and under 10 minutes to complete
- Auto-confirmation email with next steps and timeline
- Option to apply via resume upload or LinkedIn profile

Timely and Personal Communication



- Initial acknowledgment within 24 hours
- Status updates after each stage of the process
- Respectful and specific rejections with feedback if possible

Thoughtful Interview Process



- Well Prepared interviewers
- Being realistic about the work and the conditions
- Consider a small stipend if the process is cumbersome

Feedback and Closure



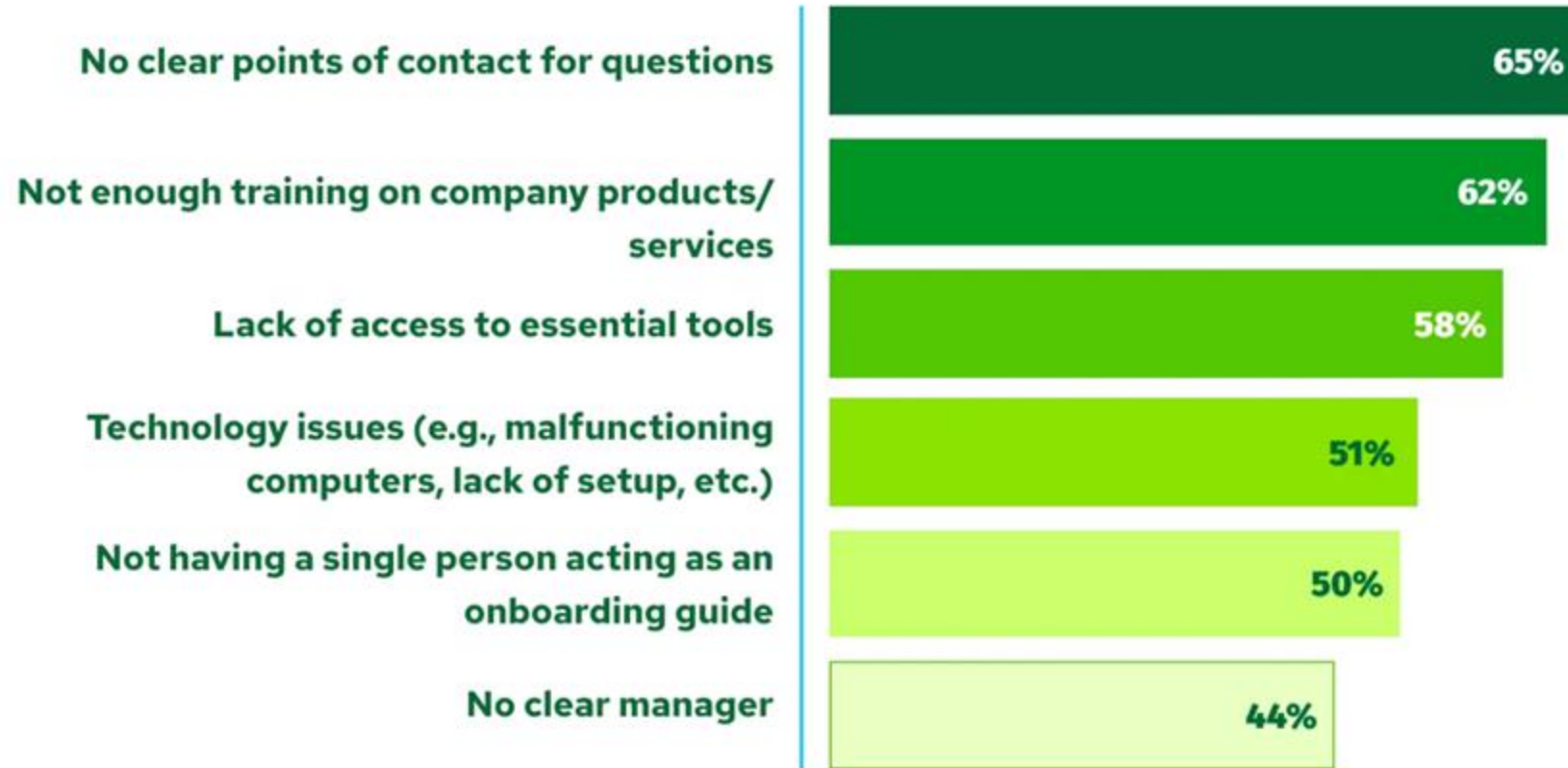
- Decision communicated within the promised timeline
- Constructive feedback provided when possible
- Thank-you note and option to stay in touch or join a talent community



Effective Onboarding

**On Average, Companies Have 44
Days to Convince New Hires to Stay**

New Hire Pain Points



BambooHR Survey



Rethink Total Rewards

- Flexible work arrangements and job sharing
- More flexible benefits packages
- Ease of access to information
- Focus on employee experience
 - Processes
 - Communication
 - Fulfillment
 - Advancement



Survey current team about what matters to them most—adjust if possible.



When you need resources but hiring isn't the best option

When to Go Fractional

Benefits of Outsourcing

Structuring the Relationship

Planning for Continuity





Strategic Fractional & Outsourced Support

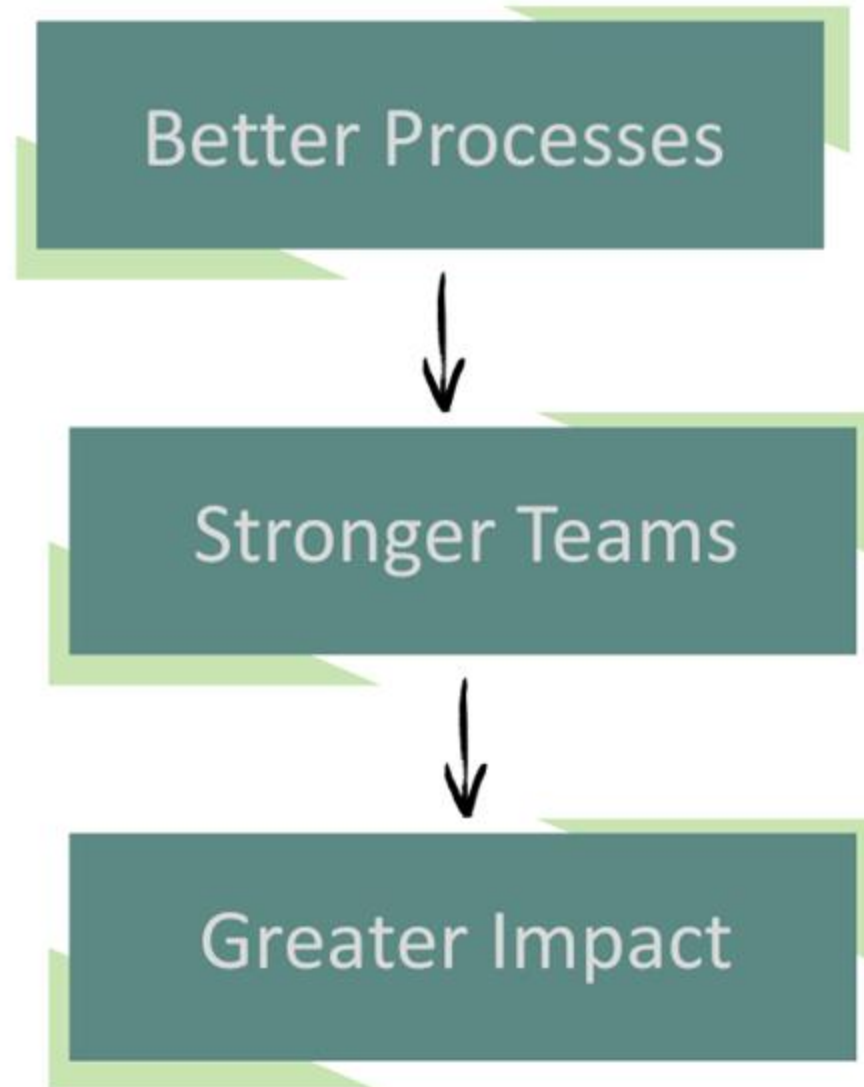
	Fractional Resources	Outsourced Resources
Definition	Individual professionals (often 1099 contractors) brought in for part-time or temporary roles.	A function or service fully handed over to an external firm, often long-term.
Use Case	Best for part-time or short-term needs.	Best for moving a function permanently outside the organization.
Best Approach	Hire specialized 1099 contractors for flexibility and skill alignment.	Engage a consulting or outsourcing firm with domain expertise.
Pros	Cost-effective access to senior talent Flexibility in hours and scope Closer collaboration with internal teams Faster onboarding	Scales easily with business needs No need to manage individual contributors Often comes with mature processes and systems Can reduce liability and overhead
Cons	May require more hands-on management Limited scalability Inconsistent availability if contractor is shared	Less control over daily execution Potential for communication gaps Can feel disconnected from company culture
Control Level	High – you manage the individual directly.	Low to Medium – managed externally by the vendor.
Integration	Often embedded within internal teams.	Typically operates independently or in parallel.
Compliance/HR Considerations	Must manage classification carefully (e.g., IRS 1099 rules).	Contract governed; firm is responsible for staffing and compliance.
Best For	Startups, scaling teams, interim executive roles, project-specific needs.	IT support, payroll, marketing campaigns, customer service, or HR operations.
Risk Profile	Lower risk of long-term commitment, but higher if misclassified.	Higher upfront commitment, but operational risk is shifted to vendor.



You're not alone: Ask for help

Prior to working at JMT - I didn't fully understand the possibilities.

- Beth Larsen, JMT SVP (and nonprofit professional)





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