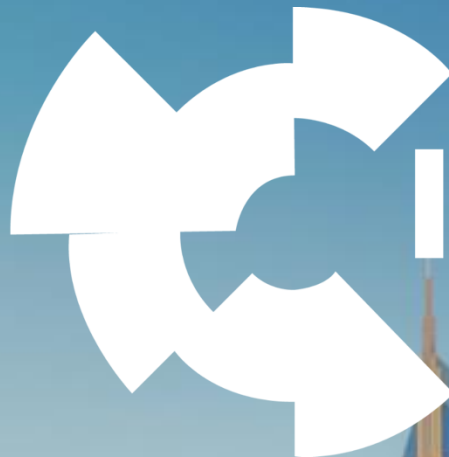


Transformation is about  
more than just tools –  
it's about People,  
Processes, and  
Leadership



MAY 5-7, 2025

**INNOVATE**

JMT CONSULTING

NASHVILLE

**JMT**  
CONSULTING

THE EXPERTS IN  
MISSION-DRIVEN  
NONPROFIT FINANCE

©JMT Consulting. All rights reserved.

Thank you to our sponsors!

Sage

bill



KarmaSuite

 **DATABASICS**

 **DAVIDOFF**  
MISSION-DRIVEN BUSINESS STRATEGY

 **MARTUS**

**Velixo**

**kanso**  
SOFTWARE

**COMPLEAT**  
for Non-Profits

 **limelight**

**ADP**

 **emburse**

**THE NONPROFIT TIMES**  
The Leading Business Publication For Nonprofit Management

 **donorperfect**

 **tipalti**



April Romero, CEO

April Empowerment Solutions

Transformation is About More Than Just  
Tools – It's About People, Processes, and  
Leadership





You can have the best new financial system in the world, but if your staff doesn't understand why it matters or how to use it, the project fails.

That's why we need **change management.**



# Piper Alpha oil rig disaster in North Sea July 1988



# ADKAR:

*Awareness*

*Desire*

*Knowledge*

*Ability*

*Reinforcement*





# The Big Picture: Transformation Beyond Technology

Digital transformation is NOT just about tools—it's about **how people work together** toward mission goals.

If people don't understand the 'why,' no system or new process will succeed. AWARENESS is always the first step.



# Leading Change While Managing Stakeholder Expectations

Awareness + Desire = Building desire means connecting the change to what each stakeholder values most.





## Understanding different stakeholder perspectives:

- Board Members – ROI, governance, long-term value
- Donors/Funders - Will this affect how my dollars are used?
- Staff - What does this mean for me?
- Regulators - They're not anti-change—they're pro-accountability.

Your job as a leader is to translate the change into a story each of these groups can connect to.



# Trust is Built One Message at a Time

- Communicate early and often
- Be honest about risks and tradeoffs
- Use storytelling
- Create two-way channels

Trust isn't a one-time announcement—it's a relationship. And relationships are built through dialogue.



# Aligning innovation with mission goals and operational realities

- Does this change support our mission?
- Is it operationally realistic for our size and capacity?
- Can we sustain it beyond the launch?

Just because we *can* do something doesn't mean we *should*.



# Balancing Innovation with Risk Management

Knowledge + Ability = We can't expect people to succeed without giving them the knowledge and tools they need.



# Identifying and mitigating risks in financial nonprofit operations

- Nonprofits face unique risks
- Common innovation-related risks
- Mitigation strategies

Risk isn't just what could go wrong—it's what might get overlooked.



	Positive	Negative
<b>INTERNAL FACTORS</b>	<b>STRENGTHS</b> Internal factors—such as skills, resources, and expertise—that contribute to successful execution and client satisfaction.	<b>WEAKNESSES</b> Internal factors or limitations that may hinder the success of your business.
<b>EXTERNAL FACTORS</b>	<b>OPPORTUNITIES</b> External conditions or trends that create advantages and growth opportunities for your business.	<b>THREATS</b> External factors or challenges that could negatively impact the success of your business.





# Lessons from IT project management: Agile approaches to risk reduction

- **Iterate in small steps**
- **Fail fast, learn fast**
- **Frequent stakeholder check-ins**
- **Prioritize value early**

In IT, we learned to move fast *without breaking everything*. That's what Agile allows—measured progress with room to adapt.



# Creating a Culture of Continuous Improvement

Reinforcement = Change sticks when people feel it's safe to experiment, safe to improve and leaders visibly reinforce those behaviors.



# Moving from reactive to proactive change management

- Reactive Mindset
- Proactive Mindset

Most organizations react to problems. Great organizations anticipate them.



# Encouraging feedback loops and cross-department collaboration

- Encourage Regular Feedback Loops
- Foster Cross-Functional Collaboration
- Celebrate Small Wins

Continuous improvement is a team sport—it thrives on shared learning.



# Implement Scalable Technology Solutions

Scalability isn't about buying bigger flashy tools — it's about building smarter systems that are aligned affordable and connected.



# Evaluate & Implement Technology Strategically

- Mission-First
- Cost Aware
- Integrated

Technology doesn't transform organizations, people using the right technology do.



# Creating Scalable Solutions that Grow with your Organization

- Start Small, Build Smart
- Modular + Configurable Tools
- Cross-Functional Design
- Strategic Roles

Scalability isn't about buying bigger tools — it's about building smarter systems.

# Navigating Resistance to Change & Applying Design Thinking

Desire + Ability = Resistance isn't bad, it's feedback about where desire and ability are breaking down.



# Why people resist change and how to address concerns effectively

- Change can be seen as a loss/grief: Denial, Anger, Bargaining, Depression, Acceptance
- How to Respond

People don't resist change—they resist *being changed without a voice.*

Using design thinking to reframe challenges as opportunities

**Empathize** – Understand the human side of the challenge

**Define** – Pinpoint the real root of the issue

**Ideate** – Brainstorm potential solutions

**Prototype** – Test a small version of the solution

**Test & Iterate** – Refine based on feedback

Design thinking starts with curiosity, not assumptions.



## Interactive exercise: What's Getting in the Way?

At your table or with a partner, jot down one **change** your organization is facing. List 2–3 barriers you've encountered or anticipate.

Now, reframe each one as a design opportunity. What might be a creative way to respond?

**Empathize** – Understand the human side of the challenge

**Define** – Pinpoint the real root of the issue

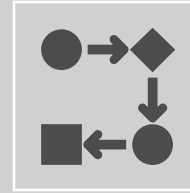
**Ideate** – Brainstorm potential solutions

**Prototype** – Test a small version of the solution

**Test & Iterate** – Refine based on feedback



## CALL TO ACTION



Jot down **3 actions** to  
commit to over the next 90  
days.



To connect  
with April, click  
here:



To learn more about  
Prosci ADKAR  
model, click here:





MAY 5-7, 2025

**INNOVATE**

JMT CONSULTING

NASHVILLE