

Mission-Critical
Migrations: A PMI-Led
Blueprint for Nonprofit
System Implementation

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INNOVATE
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THE EXPERTS IN
MISSION-DRIVEN
NONPROFIT FINANCE

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Before you do anything else:

- Reflect on where you want to be
 - Expansion, Sunsetting
- Review your timeline
 - Short-term vs long-term
- **Capability vs Capacity**
 - Engage outside resources
- Research your options



Next up:

- Build your script
 - What modules do you really need?
 - What is your current system missing?
 - What don't you know?
- Stick to the script
- Ask for what you need
 - How can I make this process better/faster?



So, you made a decision:

- Negotiate
 - Timing/Price/Staff
- Make sure it works for you



SYSTEM IMPLEMENTATION = ORGANIZATIONAL TRANSFORMATION

TRADITIONAL VIEW

- Not an IT project
- Impacts people, process, and data
- Success = go-live

REALITY VIEW

- Business-led
- Focus on adoption
- Success = go live, adoption

Most failures happen after go-live—not before.

WHAT MAKES IMPLEMENTATIONS HARD

- **Complexity** → Too many moving parts
- **Dependency** → Teams rely on each other to succeed
- **Risk** → Failure impacts operations and compliance

Complexity + Dependency = Risk

It's not one problem—it's the combination that creates risk.



HURDLES



HURDLE #1: THE DATA PROBLEM

Data issues don't show up at the start—they show up when it's too late.

- No single source of truth
- Conflicting definitions across teams
- Poor data quality
- No clear ownership



HURDLE #2: STAKEHOLDER MISALIGNMENT

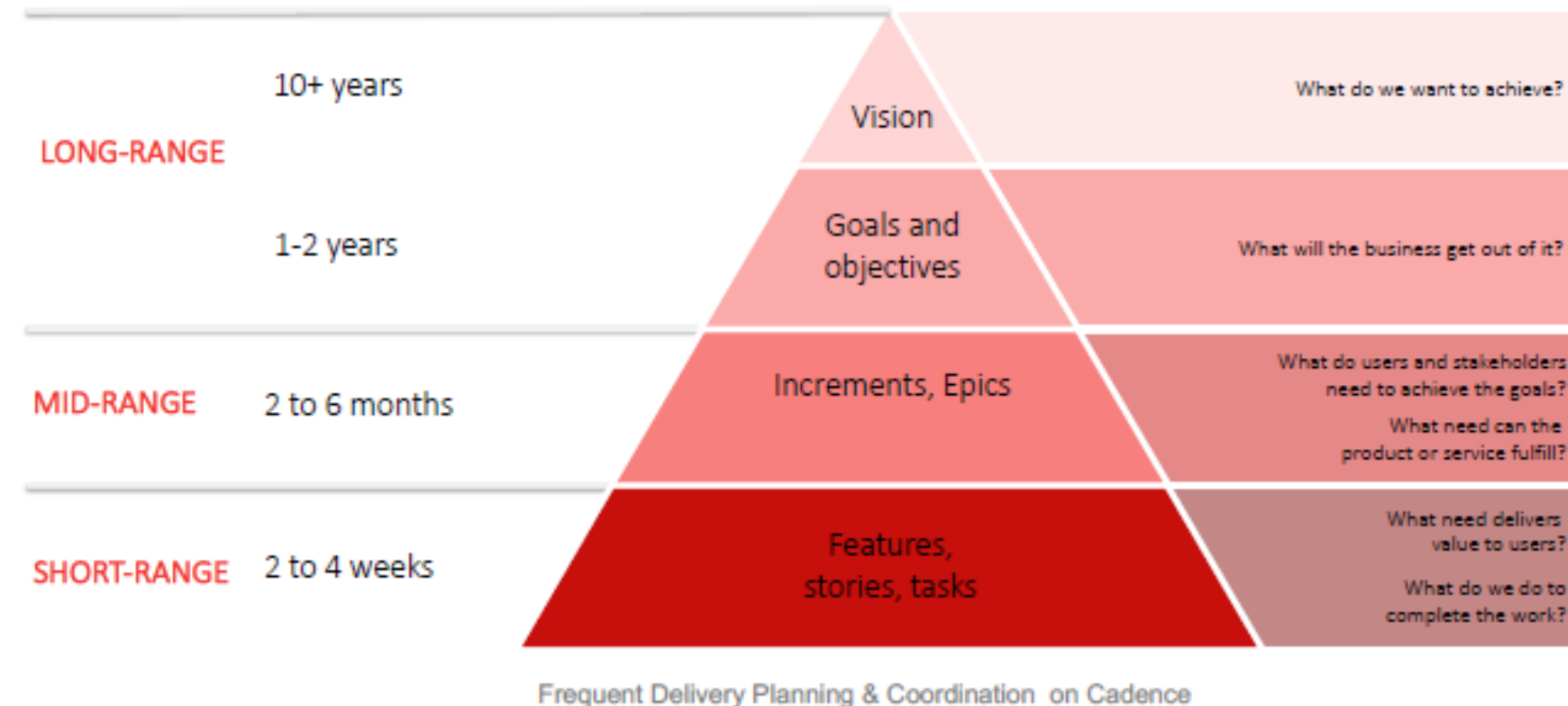
“If teams aren’t aligned from vision to execution, delivery will break.”

↪ **Conflicting priorities**
↪ Different outcomes

↪ **Late surprises**
↪ Misalignment discovered too late

↪ **No shared success criteria**
↪ No common definition of success

Connecting Teams’ Work to Shared Vision



Strategy → Execution gap

HURDLE #3: UNDERESTIMATING CHANGE

Most implementations fail because change is treated as an event—not a process.

- Training too late → Users see the system for the first time at go-live
- User resistance → Change feels imposed, not owned
- Low adoption → Workarounds replace intended workflows

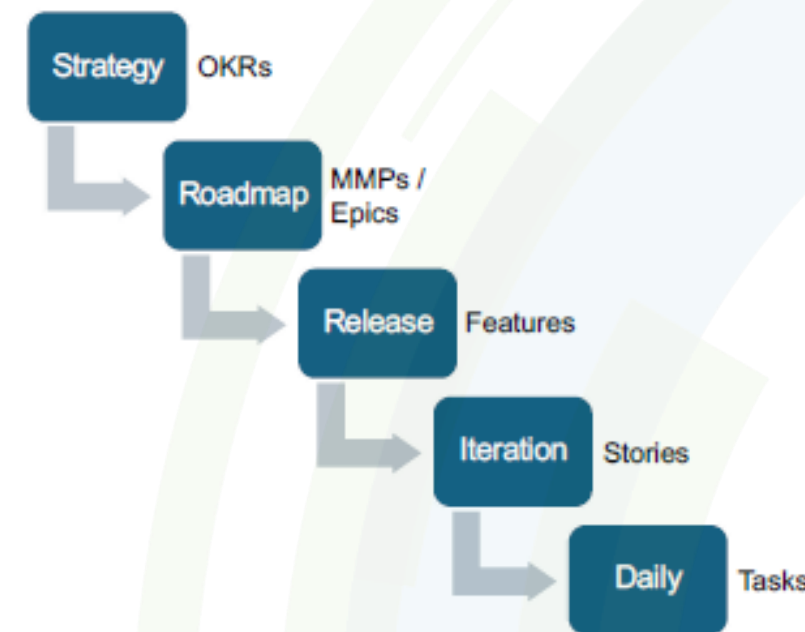
What is Adaptive Planning?

Dynamic process of adjusting plans in response to change at all levels of the organization that emphasizes **short-term adjustments** while staying aligned with long-term goals.

Focus on Flexibility: Respond quickly to change.

Deliver Outcomes: Prioritize value over output.

Iterate Continuously: Plan, execute, adapt.



Continuous Change Management

HURDLE #4: BIG BANG THINKING

“Trying to do everything at once is the fastest way to delay everything.”

- Big Bang Approach
- One release
- Long timeline
- High risk



SOLUTION



ENTERPRISE AGILITY = VELOCITY * FOCUS * FLEXIBILITY



VELOCITY

Speed of moving from ideation to execution

Strategic Importance

Allows us to outpace competitors, capitalize on opportunities, and reduce time to market

Relationship with Agile

Agile methods prioritize rapid iteration and continuous delivery, enabling accelerated product development and decision-making.



FOCUS

Aligning resources and efforts towards critical strategic goals and client needs

Strategic Importance

Prioritizes what's truly important and eliminates distractions, enhancing competitive advantage.

Relationship with Agile

Agile methods encourage working on manageable tasks directly contributing to overall objectives, ensuring efforts add real value.



FLEXIBILITY

Capacity to adapt to change, pivot strategies, and modify processes in response to new information or market conditions

Strategic Importance

Ensures resilience to disruptions and maintains relevance and competitiveness over time.

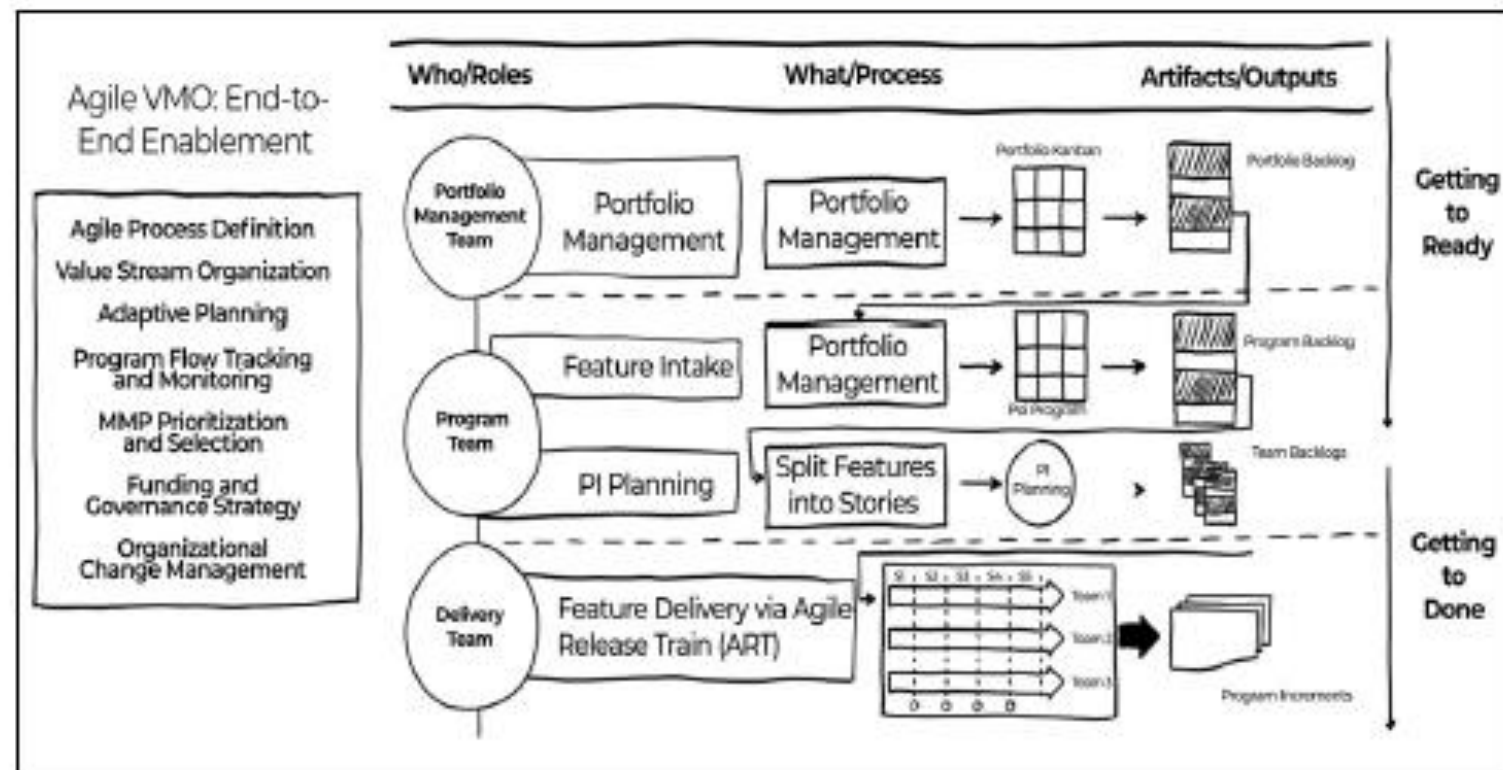
Relationship with Agile

Agile methods emphasize adaptability in planning and execution, allowing organizations to change course based on feedback and outcomes.

SHIFT TO VALUE DELIVERY

Agile VMO: End-to-End Enablement...

The Agile VMO facilitates the continuous flow of value across the organization.



From PMO to VMO Managing for Value Delivery by Sanjiv Augustine, Roland Cuellar, and Audrey Scheers, Copyright © 2021 by Lithespeed, LLC

Utilizing a Fit-for-Purpose Operating Model

Agile VMO

Value delivered in small cross functional Agile teams

Team of Teams organizational structure

Focus on customer

Product Mindset

Cadence based cross team planning

Focus on continuous improvement

Lean Thinking

Rolling wave planning



BEST PRACTICE #1: TREAT DATA AS A WORKSTREAM

1

ASSIGN OWNERSHIP

2

DEFINE SOURCE OF TRUTH

3

BUILD VALIDATION LOOPS

BEST PRACTICE #2: ALIGN EARLY

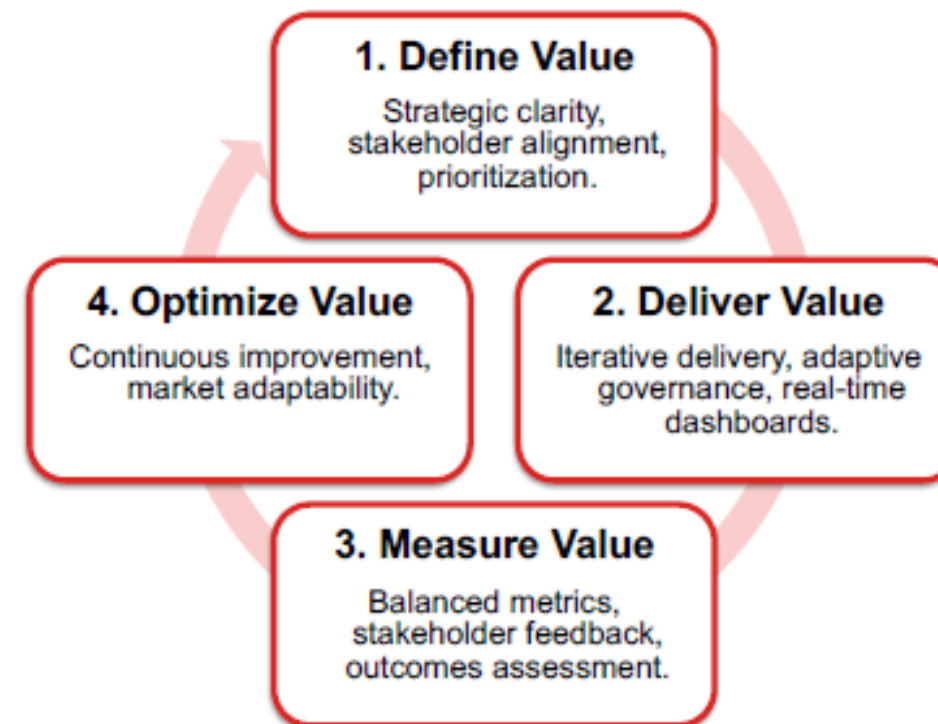
- **Define success upfront** → One shared definition of success
- **Map stakeholders** → Identify decision-makers and influencers
- **Establish governance** → Clear ownership and decision rights

- Alignment Framework
- **What** → Success criteria
- **Who** → Stakeholders
- **How** → Governance

BEST PRACTICE #3: PHASE THE IMPLEMENTATION

- Break into increments
- Deliver value early
- Reduce risk

Value Realization Lifecycle



Tools to Drive Value Realization

- Value Stream Mapping for strategic alignment.
- Weighted Shortest Job First (WSJF) for prioritization.
- Kanban Boards for delivery tracking.
- Dashboards for real-time insights.
- Retrospectives for continuous improvement.

BEST PRACTICE #4: DESIGN FOR ADOPTION

- Early user exposure
- Hands-on environments
- Continuous feedback

Establish Process Guardrails without Prescription

1. Programs and projects frequently deliver valuable product	2. Value is continuously discovered and aligned to mission	3. Work flows in small batches and is validated	4. Quality is built in
5. Teams collaborate across groups and roles to improve flow and remove delays	6. Security, accessibility and other compliance constraints are embedded and verifiable	7. Consistent and repeatable processes are used across build, deploy, and test	8. The entire system is deployable at any time to any environment

BEST PRACTICE #5: HYPERCARE MODEL

- **Stabilize** → Fix critical issues
- **Support** → Help users adapt
- **Improve** → Feed learnings back into the system

✘ WEAK HYPERCARE

- Slow response
- Frustrated users
- Loss of trust

✔ Strong Hypercare

- Fast resolution
- Confident users
- Increased adoption

IMPLEMENTATION FRAMEWORK


Plan → Configure → Validate → Launch → Stabilize




WHAT SUCCESS LOOKS LIKE

- Reduced manual work
- Better data access
- Faster decisions
- Higher adoption

Plan → Define → Design → Build → Test → Deploy → Adopt → Maintain



KEY TAKEAWAYS

- **Implementation = transformation**
 - **Data is biggest risk**
 - **Alignment drives success**
 - **Adoption starts early**
 - **Go-live is not the end**
- 

ENTERPRISE AGILITY MODEL

- **Velocity** → Speed of delivery
- **Focus** → Prioritization of value
- **Flexibility** → Ability to adapt
- **Agility** = Balance of all three

Establish Process Guardrails without Prescription



FROM PROJECT THINKING TO PRODUCT THINKING

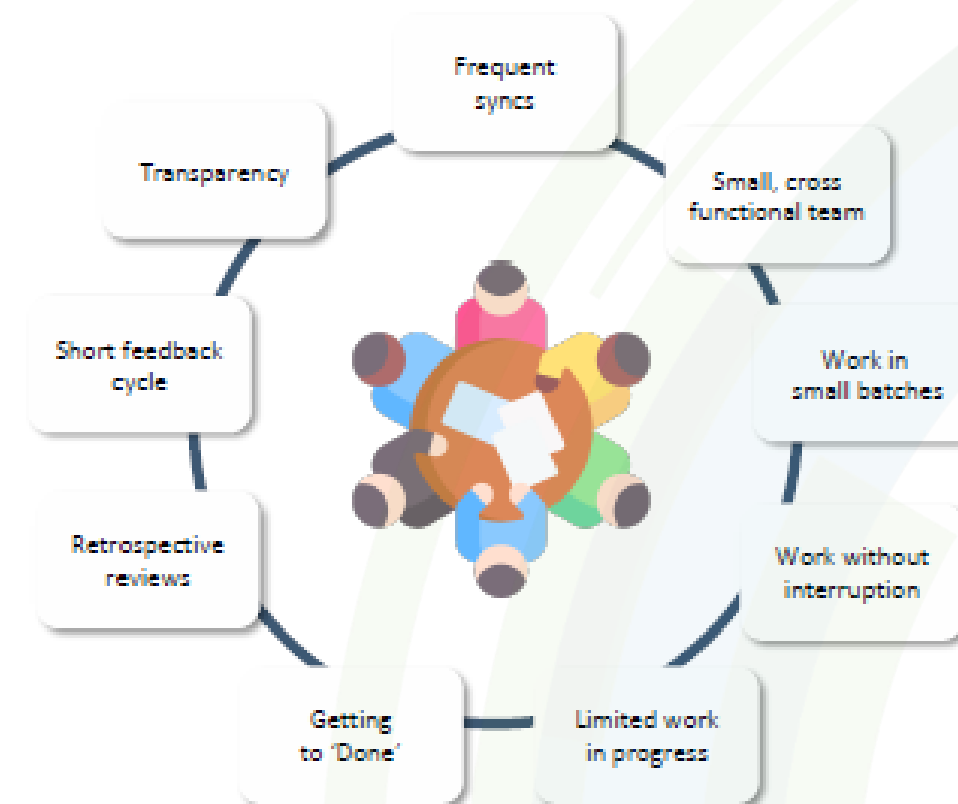
- **Project:** Fixed scope, timeline-driven
- **Product:** Continuous value delivery
- **Shift mindset to iterative outcomes**



ADAPTIVE PLANNING CYCLE

- Plan → Execute → Review → Adapt
- Short cycles (2–4 weeks)
- Continuous reprioritization
- Feedback-driven decisions

Focus on **Value** with Agile Management Practices



Benefits	Greater visibility into teams' work; ability to redirect & reduce risk
Key Metric	Progress from a business value perspective, at least once per month
Lean on	Scrum, Kanban, and other team-level frameworks

WAYS TO IMPLEMENT AGILE PRACTICES

Whichever route you choose, Agile is flexible in its very nature. There is no wrong or right way to get started with Agile.

STAND UP MEETINGS

Have short (15-minute) daily stand-up meetings to provide a venue for project team members to communicate roadblocks they are experiencing, and for management to help resolve.

DELIVER IN SMALL BATCHES

Deconstruct work into small segments and organize effort into short chunks in order to get quick feedback and make nimble course corrections

DEMONSTRATE & ADAPT

Embed stakeholders and their feedback in order to continuously improve

WAYS TO IMPLEMENT AGILE PRACTICES

MAKE WORK VISIBLE

Create and use a Kanban board. The Kanban board is a simple tool to help your team visualize the flow of work as it's getting done. Use the board during stand-up meetings to discuss current work in progress or display it where your team can easily access it to make updates to task status.

PRIORITIZE WORK, LEARN TO SAY NO

Manage each project team member's work-in-progress. Set clear and realistic expectations for what work can be accomplished in a given period to not over-allocate resources. This requires the team to prioritize its work and accomplish the most critical tasks first.

REFLECT AND IMPROVE

Conduct and communicate lessons learned frequently and not just at the end of the project

OUTCOME-BASED METRICS

Key Themes	Metrics	Description	How to measure	Cadence
Strategic Performance	Objectives & Key Results (OKRs)	How well are the value streams contributing to the goal of the organization	OKR driven roadmap: can use Jira	1x/quarter
Predictability	Predictability Measure	Overall planned vs actual value via projects/initiatives/improvements delivered	Computed	1x/quarter
Continuous Improvement	Before and After Comparisons	Compare performance metrics before and after implementing improvement initiatives	Computed	1x/quarter