



# How to Use Project & Change Management for Digital Transformation

## Forvis Mazars Nonprofit Advisory Services

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# Your Presenters

## Corinna Creedon, CPA Managing Director



Corinna is a Managing Director of Forvis Mazars and leads its National Nonprofit Advisory Services Practice, as well as the New York Nonprofit Advisory Services and Emerging Outsourced Accounting Services practices. She is the National Leader for Forvis Mazars' Nonprofit Digital Technology Strategy and Innovation team.

She brings more than 25 years of experience as a finance executive, where she has provided interim- and outsourced-CFO services to a wide range of organizations. Well-known for her strong project management skills and providing unmatched client experiences, Corinna is widely regarded for her ability to quickly assess an organization's needs and execute engagements in a timely manner. She excels at leveraging technology to automate and enhance efficiencies, and redesigning accounting departments to provide for effective internal controls over financial reporting processes which also support the strategic plans of the organization's mission.

Corinna is a frequent speaker at regional and national conferences. Prior to joining Forvis Mazars, Corinna ran her own consulting practice, specializing in outsourced and interim CFO engagements, special projects, and PMO engagements. Corinna began her career in audit at a Big 4 accounting firm and then moved into the private sector and nonprofit arena serving in finance executive roles.

She is a member of the American Institute of CPAs and the New York State Society of CPAs.

She has also been honored as one of Crain's New York's Notable Leaders in Accounting and Consulting in each of [2020](#), [2021](#), [2022](#) and [2023](#).

Corinna holds dual degrees in accounting and international business from NYU Stern School of Business and is a licensed CPA in New York.

## Andrew Horrow, CPA Director



Andrew has 15 years of experience serving nonprofit and public sector organizations. He is versed in various aspects of internal and external reporting, grants management and procurement, system implementations, and accounting system automation design. He also has experience in dealing with tax matters for exempt organizations, payroll tax considerations, and other filings. He is a Director in Forvis Mazars' Nonprofit Digital Technology Strategy and Innovation team.

Prior to joining Forvis Mazars, he ran the accounting department for a large microfinance institution, helping them centralize all accounting systems for their nationwide operations. He also was a managing tax accountant at a regional public accounting firm specializing in Form 990 preparation and review.

Andrew is certified in FENXT and Sage Intacct. He has intimate knowledge and training on many other GL, AP, Budgeting, Purchasing, and Fixed Asset Platforms.

He is a member of the American Institute of CPAs and is a licensed CPA in New York and Pennsylvania.

Andrew is a graduate of Muhlenberg College, Allentown, Pennsylvania, with a B.A. degree in accounting and finance.

# Agenda

1. Objectives
2. What Is Change Management?
3. Change Management vs. Project Management
4. Where to Start?

# Objectives

- Define the key differences between project management & change management.
- Identify how good project & change management can facilitate a successful, smoother digital transformation.
- Describe steps organizations should take to set a course for a thriving, inclusive change management process.

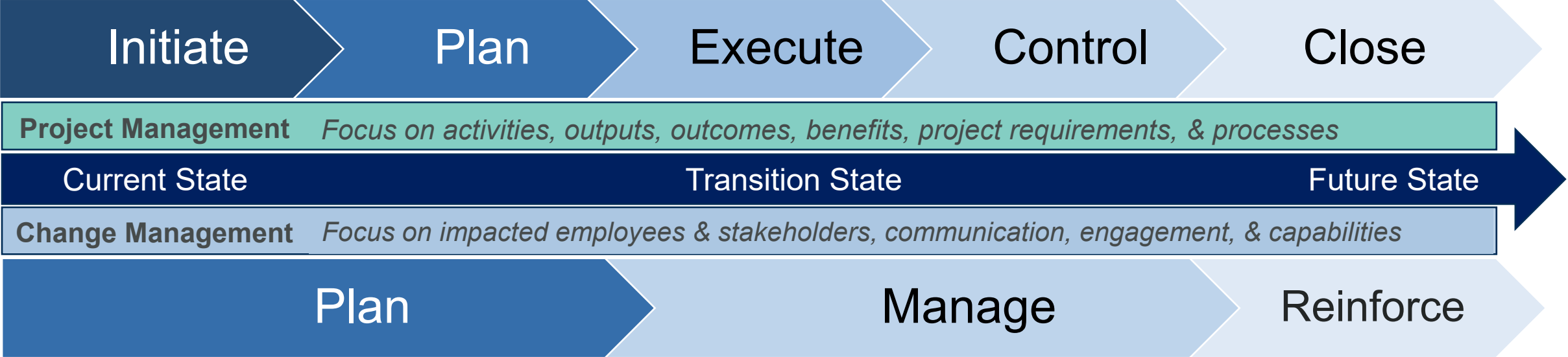
# What Is Change Management?



# What Is Change Management?

Change management is the people side of change.

- Focused on changing behaviors to promote acceptance of organizational change





**Change Management &  
Project Management:**

**Why They Go Hand in  
Hand**



# Why Project Management Is Important

Maintaining Budgets

Timeliness of Project

Documenting Key Decisions

Documenting Steps &  
Project Completion



# Why Change Management Is Important

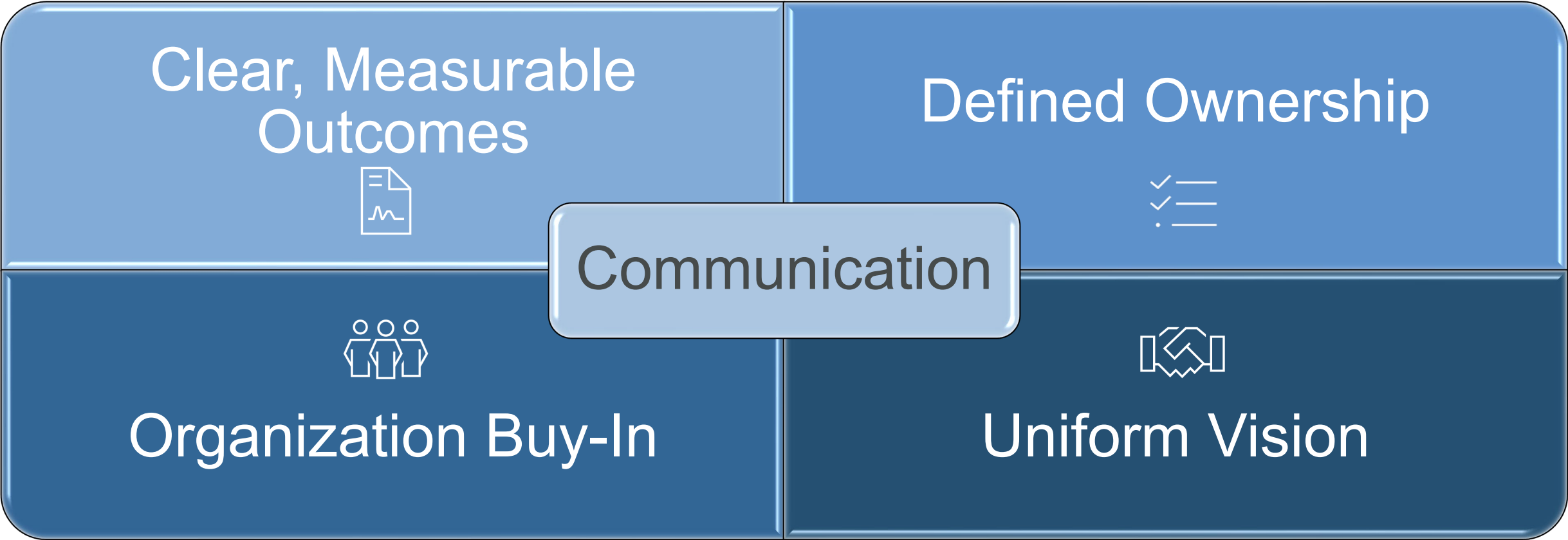
Attracting & Retaining  
Employees

Creating Operational  
Efficiencies

Mission Consistency &  
Visibility

Adaptability & Resiliency

# Some Pillars of Good Change Management



# When Change Management Goes Wrong

1. Siloed Input
2. Changing Goals or Rationale
3. Unwillingness to Change Specific Processes
4. Disjointed Management Alignment



# Effective Project Management

## Flexible Plan

- Set a plan, but work to make it adjustable
- No change is perfect!
- Be able to adjust on the fly & re-establish the goals

## Clear Communication

- Work to make consistent communication with management & stakeholders
- Clear & transparent project plans are key



- Make a reasonable project plan
- Work with stakeholders & employees to anticipate “black out” periods



# Case Study 1



## Consistent Messaging

- Organization had a clear project charter
- Goals & outcomes were defined & consistent
- Routine updates to staff on status of major initiative



## Organizational Input

- Steering committee was made up of multiple departments
- Multiple feedback loops allowed for voices to be heard
- Surveys & interviews used to gather information



## Clear Decision Process

- Decision was documented & rationale was explained
- Before final decision, it was shared with steering committee for comment
- Multiple sign-offs of decision to document uniform agreement

**Great Change Management Lead to a Successful Project!**

# Case Study 2



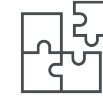
## Warning Signs

- Project was run out of Finance with no organizational input
- Multiple consultants brought in to work on the same project
- No clear goals or outcomes



## Disjointed Management

- Management was not in alignment on project goals
- Different ideas & no clear steering committee



## Lack of Vision

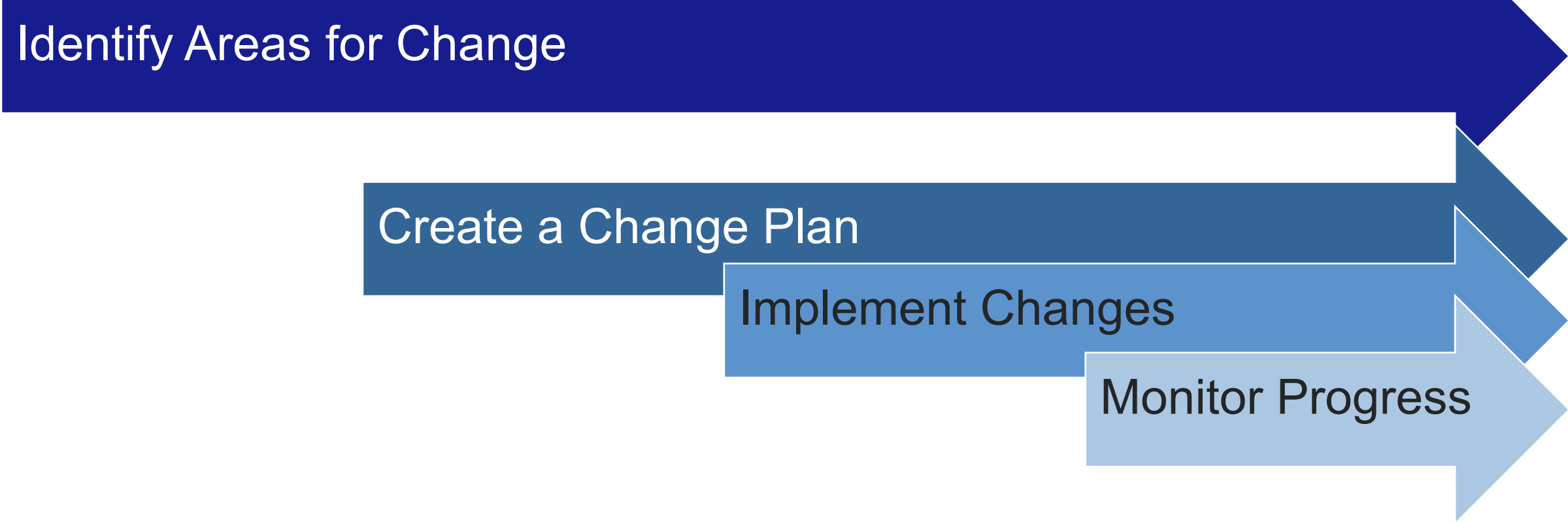
- No clear data gathering
- Every step would lead to a different organization “need”

Ineffective Change Management Caused the Project to Be Unsuccessful

# Where to Start?



# Building Change Management

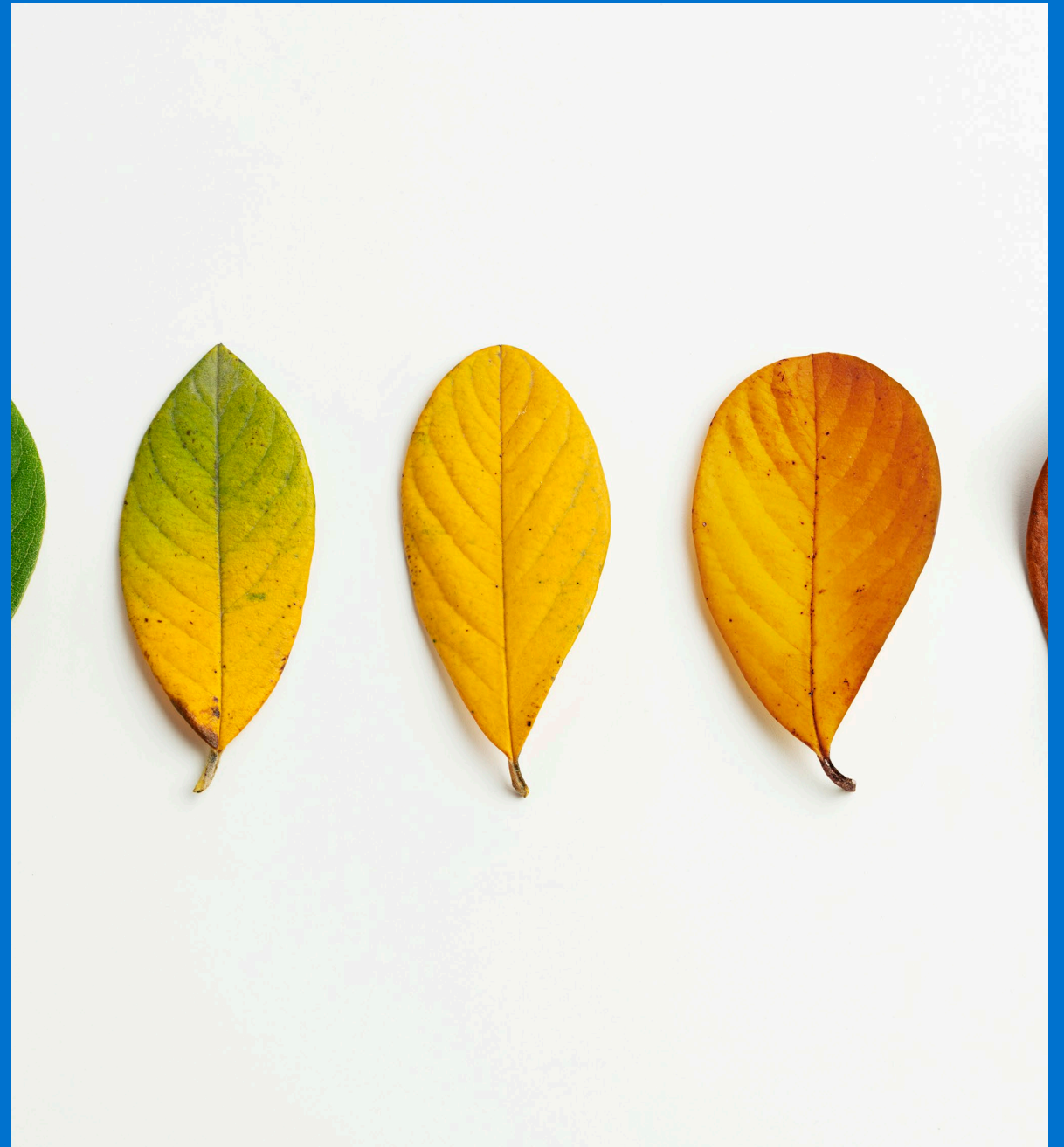




# Identify Areas for Change

Utilize the following framework:

1. Review External Factors
2. Review Internal Factors
3. Perform a Gap Analysis
4. Prioritize
5. Decide



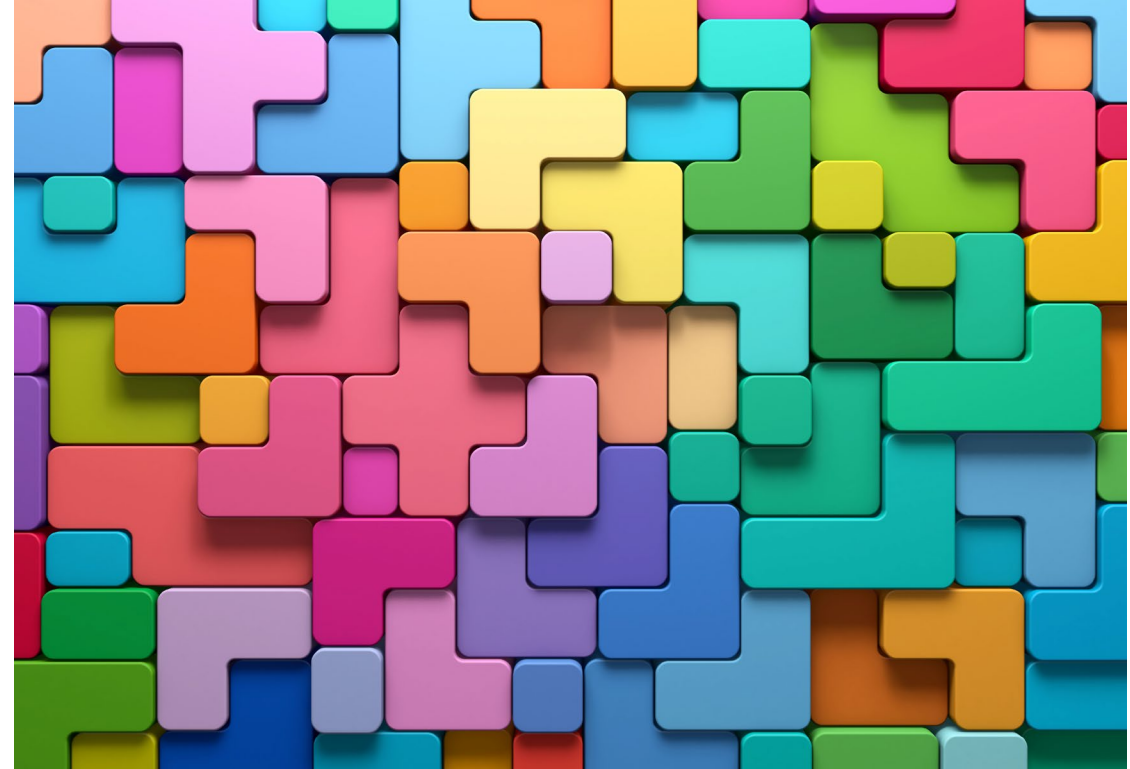
# Implement Changes

The **good news** – You put a lot of effort into planning.

- Follow your change road map & timeline
- Utilize communications/training plan
- Monitor objectives & desired results

The **bad news** – This is the messy middle!

- Resistance management
- Risk management
- Ensure CM & PM are on the same page



# Where to Start



# Objectives

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Questions?



# Thank You for Attending!

## Additional Questions? Please contact us:

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