



Welcome to

KINDFEST

KindCon²⁰²⁶

The Pipeline Is a Team Sport

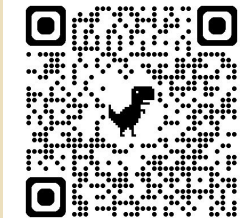
Shifting from reactive requests to
proactive strategic partnership





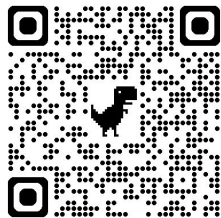
Caroline Chang

VP, Advancement | Kindsight



Kate Nimety

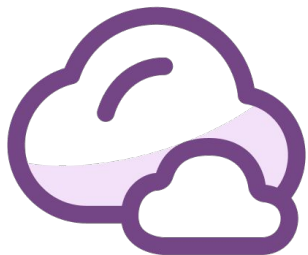
Executive VP, Strategy | BWF Zuri



“Strategy without tactics is
the slowest route to victory.
Tactics without strategy is
the noise before defeat.”

- *Sun Tzu*





What does strategic mean to you?



From Service → Strategy

Reactive

Focused on immediate operational demands

Proactive

Anticipating needs and designing solutions

Traditional

Strategic

Task-focused

Execution of specific requests and tickets

Outcomes-focused

Driven by long-term business impact

Request queue

Behind the scenes

Decision-driving

At the table

Case Study: UC Berkeley

Presented with a need: A replacement for a legacy and aging CRM ecosystem of multiple parallel systems

The “Berkeley Way”:

- Consensus-driven decisions
- Prioritizing the dollars-in fundraising departments
- Requirements based on fundraising goals

The Strategic Path:

- Requirements based on Data Strategy
- Data Strategy alignment meetings well ahead of system selection
- Feedback loop with clear decision-making team



How might we...?

The 90 Day Plan



Listen & Map

Days 1-30

How might we engage more proactively to solve a problem?

Who to talk to, what situations should you find?

Pilot & Adjust

Days 31-60

Continuous improvement cycles: Plan, Do, Check, Act

What does success look like?

Measure & Propose

Days 61-90

Measure before, measure after.

How might this create meaningful change in your organization?

Self Assessment

Where does your team currently fall?

What behaviors reinforce that positioning?

What organizational factors influence this?

Where do you and your group align? What's different?

What reactive request keeps landing on your desk? What need did you spot before anyone asked?



Break it
down!



What's holding you back?

The Proposal

Take one thing holding you back from a proactive, strategic action and make a plan:

“I’d like to pilot _____ with
_____ for the next 90 days.”



What does success look like?

2-3 measures

Agree on a win!

What small specific ask makes this plan possible?

Where can you find help or support?

Tools, mechanisms, champions,
curious optimism

What is the feedback loop?

How will you tell your story?

Who needs to follow your journey?



Thank
you.