



**Organizational Change Management Strategy
CEMI DEEP Transformation**

APPROVED BY EXECUTIVE SPONSORS MAY 2026

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Introduction, Purpose, and Scope

Purpose

This Change Strategy defines the organizational change management approach for the Donor Engagement and Experience Project (DEEP), a core initiative within the Cornell Experience Modernization Initiative (CEMI). It outlines how Cornell will prepare, engage, enable, and support Development, Engagement, and Operational staff as DEEP introduces new systems, processes, and ways of working.

The strategy is designed to:

- Prepare staff for DEEP-enabled change by clearly articulating the value proposition (e.g., improved engagement, shared processes, operational efficiency, reduced duplicate work, and more time for donor-focused work).
- Align DEEP change activities with CEMI and Development and Engagement strategy and other Cornell-wide initiatives where relevant.
- Clarify governance, ownership, and operating expectations for change management.
- Support adoption, proficiency, and sustainment of people, processes, and technology changes over time.

Strategic Context and Vision

DEEP is a multi-year transformation advancing Cornell's mission and next-generation Development and Engagement goals by strengthening shared systems, data, and ways of working across Ithaca AA&D (including the Cornell Lab of Ornithology) and Weill Cornell Medicine.

What Will Change for Development and Engagement Staff

In practical, day-to-day terms, DEEP will change how teams:

- Access and use constituent and gift data
- Manage relationships, portfolios, and engagement activities
- Execute reporting, stewardship, and operational workflows
- Collaborate across units using shared systems, processes, and governance

Leaders and managers at all locations are expected to reinforce these changes consistently, model future state behaviors, and support staff through the transition.

Institutional Context and Community Feedback



What the community is saying about CEMI



As part of CEMI, Cornell gathered feedback from Development and Engagement leaders and stakeholders to understand the organizational context for DEEP and what will be required to support adoption. Inputs summarized in this section draw from the DEEP Phase 1 Kickoff Leadership Visioning Session and Change Management Advocacy Session (including the Slido Activity Summary).

Leadership feedback highlighted a strong desire for greater clarity around DEEP's purpose, scope, and decision-making model, as well as clearer articulation of how enterprise goals translate into unit-level value. Leaders also emphasized the importance of acknowledging meaningful differences in fundraising models, constituent relationships, and regulatory environments across multiple organizations—particularly when using “One Cornell” language—so shared approaches create value without slowing units down.

Across interviews and discussions, participants noted perceptions of uneven participation and influence, reinforcing the need for clear governance, intentional representation, and consistent leadership messaging. Across units, stakeholders stressed that adoption depends on a credible, practical value proposition that explains how DEEP will improve daily work, reduce friction and manual effort, and support local Development and Engagement strategies—not solely institutional objectives—especially considering real capacity and workload constraints.

These themes directly shape the DEEP change strategy, informing its emphasis on leadership alignment, governance clarity, unit-specific value framing, two-way engagement, and realistic pacing. They also reinforce the importance of consistent communication, transparent decision making, appropriate standardization with well-justified exceptions, and nonnegotiable security, privacy, and compliance as DEEP evolves.

Change Management Framework

The DEEP change approach draws on Prosci change frameworks and aligns with practices used across CEMI initiatives.

The strategy addresses both:

Organizational Change

- Governance alignment and leadership engagement
- Stakeholder readiness and engagement
- Communications and feedback mechanisms

- Training, enablement, and sustainment

Individual Change

- Awareness of the change and its purpose
- Desire to engage and participate
- Knowledge of future-state processes and tools
- Ability to perform new behaviors
- Reinforcement through leadership actions and support

Change activities are integrated with DEEP delivery milestones so adoption is addressed as part of implementation—not after go-live.

Benefits of Timely Investment in Change Management

Experience from large-scale enterprise transformations, including Cornell's ERP Workday program, demonstrates that early and sustained investment in change management is critical to realizing value.

Effective change management:

- Reduces disruption to ongoing Development and Engagement operations
- Improves adoption and time to proficiency
- Mitigates resistance and change fatigue
- Protects Cornell's investment in DEEP
- Establishes a foundation for future CEMI initiatives

Change management for DEEP is positioned as a strategic enabler, not a downstream or optional activity.

Leadership Alignment: North Stars, Operating Principles, and Decision-Making

These principles will guide our work as we move to one Cornell development and engagement information system.

Our North Stars

- Increasing fundraising productivity and engagement for each college and unit and consequently the entire university as a best in class organization.
- Building trust across the function.
- Prioritizing clear security roles and data governance. Honoring patient privacy and PHI is non-negotiable.
- Building a strong supporting infrastructure.
- Leveraging shared data, analytics, and innovative approaches to drive better outcomes.
- Reducing duplication, manual work, and process friction.
- Improving the donor experience.

Operating Principles

- Acting as dual citizens of both our units and the University, respecting different organizational cultures while aligning where shared approaches create value.
- Creating new communities of expertise for mutual growth.
- Embodying that we are a donor-centric program. Our goal is not to convert single interest donors unless we have achieved collaborative agreement in advance.
- Aligning to the “As Common as Possible, as Different as Absolutely Necessary” credo. Granting exceptions only when differences drive significant growth, strikingly improve the donor experience, protect reputation, or meet regulatory needs. Moving from unit specific solutions to shared capability.
- Communicating clearly, early, and often. Approaching differences in practice and opinion with candor, curiosity, and openness.

Decision Making Processes

- Basing protocol and resource priority decisions on the greatest fundraising, donor, or efficiency impact on a university and campus/program basis when possible.
- Building transparent, timely, and enterprise minded decision-making systems for prospect clearance, security roles, gift attribution, and stewardship that enable nimble frontline work.

Governance and Operating Model

OCM Governance Alignment

OCM governance for DEEP is embedded within the existing DEEP governance structure defined in the Project Charter. No parallel OCM governance bodies are created. Governance is designed to enable progress (not slow frontline work) by making decisions timely, transparent, and repeatable—and by clearly communicating decision outcomes and the criteria used.

OCM activities align with:

- DEEP Executive Sponsors
- DEEP Project Leadership Team
- DEEP Project Management
- Core Working Group
- CEMI governance pathways

Change Management Leadership Team

Name	Title	Change Management Role
Tracy Cary	AVP, Operations Alumni Affairs and Development	Change Lead
Trish Davis	Assistant Director, IT Change Management and CEMI Cornell Wide Change Lead	Change Management Advisor
New Hire	Change manager – CEMI-DEEP	

The Change Management Leadership Team will work closely with DEEP Training and Communications leads to ensure integrated planning, consistent messaging, and coordinated execution across readiness, communications, training, and go-live support.

Decision Making and Escalation

- Local-scope issues are addressed within DEEP governance using shared criteria and unit context

- Cross-unit or institutional impacts escalate through CEMI pathways to balance Unit Strength, Cornell Impact with constituent experience
- Readiness and adoption risks—including capacity constraints and needed exceptions—are surfaced early; exceptions are documented with explicit rationale tied to growth, constituent experience, reputation, or regulatory/privacy needs

Leadership Commitments and Expectations

Leadership engagement is a primary driver of successful change. Impacted stakeholders look to leaders and managers for transparent communication, visible prioritization support (time and capacity to do the work), and consistent reinforcement of why DEEP matters and what it will change in day-to-day work. Leaders are also expected to model the guiding principles in practice through decisions, messages, and daily behaviors, so “everyone is responsible” becomes practical accountability, not just a slogan.

Role of Leadership

Sponsor and leadership participation promote stakeholder participation at all levels of the organization. No amount of change management activity can make up for a lack of active sponsorship, so it is crucial to align and equip DEEP sponsors and key leaders (e.g., DEEP Executive Sponsors, DEEP Project Leadership Team, and unit leaders across Ithaca Alumni Affairs and Development, including the Cornell Lab of Ornithology, and Weill Cornell Medicine) on the importance of visible, consistent support of DEEP.

In coordination with the Change Management Leadership Team, key Cornell leaders will be equipped with information and specific requests regarding DEEP and the DEEP change program. This may include providing action items during leadership forums, reinforcing messages through leader communications, sponsoring and activating the Change Network, and participating in key moments (e.g., project updates, readiness activities, training communications, and go-live messaging). At strategic times, and/or as needed, leaders will be asked to communicate directly with stakeholders to share information, set and manage expectations, and recognize progress. These opportunities should be reflected in the DEEP communications plan and cadence.

Set and Manage Expectations and Priorities

Feedback gathered across DEEP has reinforced the need for leadership to set clear expectations regarding stakeholder participation. These expectations should be modeled and reinforced by all levels of leadership and management across the three units. Specifically, leadership should:

- **Confirm Priorities:** Confirm DEEP as an enterprise priority (and back that commitment with action). Staff cannot fully engage in implementation and change activities while carrying a full operational workload without trade-offs. Leadership should actively identify opportunities to shift, defer, or redistribute responsibilities so that DEEP participation (e.g., SME engagement, testing cycles, training completion) is not treated as “one more thing” on top of existing work. When capacity is not addressed, change fatigue sets in, engagement drops, and adoption stalls.
- **Clear the Path for Participation:** Leaders at every level are responsible for removing barriers that prevent staff from meaningfully engaging in DEEP activities. This includes working with managers to temporarily reduce competing demands, adjusting deadlines on non-critical work, backfilling roles where feasible, and being transparent about what can pause or slow down during peak implementation periods. Research consistently shows that organizations where sponsors actively manage workload and resource allocation are significantly more likely to meet change objectives. DEEP should feel like a supported priority, not an unfunded mandate.
- **Set and Manage Expectations:** Set the expectation that impacted stakeholders will engage in DEEP activities (including, but not limited to, reading communications, attending meetings or

demos as requested, participating in readiness activities, and prioritizing required training). Reinforce that proficiency will build over time and users are not expected to “learn everything overnight.”

- **Incorporate DEEP Engagement Into Performance Goals (as appropriate):** Where applicable and aligned with unit practices, incorporate DEEP participation into goal setting and performance conversations (e.g., SME deliverables, Change Network participation, timely completion of training, or readiness activities). Participation expectations should be clear and measurable where feasible.
- **Recognize Staff:** Recognize staff for outstanding contributions and sustained commitment to DEEP (e.g., acknowledgements in unit meetings, DEEP updates, town halls, or other unit-appropriate recognition methods).

Cornell Ownership and Huron Role

How We Work Together

Cornell and Huron operate under a collaborative model in which:

- Cornell owns decisions, execution, and outcomes
- Huron provides advisory support, tools, templates, and leading practices
- Change insights inform governance discussions and escalation

Cornell Owns

- Change direction and priorities
- Stakeholder engagement and communications
- Training and adoption execution
- Decisions, accountability, and outcomes

Huron Supports

- Change strategy development
- Prosci-aligned tools and frameworks
- Advisory guidance and leading practices
- Templates and enablement assets

Readiness, Engagement, and Change Enablement Pillars

DEEP change enablement is organized around three integrated pillars:

Change Network

A network of unit-level representatives who:

- Serve as local advocates
- Surface feedback and concerns
- Support readiness and adoption activities

Communications

Two-way, role-aware communications that:

- Reinforce why DEEP is happening now
- Clarify what is changing and what is not
- Provide feedback channels

Training and Enablement

- Role based training aligned to real Development and Engagement workflows and supported by job aids, reinforcement, and structured hyper care support after go-live (e.g., office hours, guided practice sessions, and targeted refreshers).

Readiness insights are reviewed regularly and used to adjust engagement, communications, and training.

Stakeholder Engagement

All impacted units are equal partners in DEEP design and adoption.

Coverage by Unit

Unit	Primary Stakeholders	Key Change Considerations
Ithaca AA&D (including Cornell Lab of Ornithology)	Development and Engagement leadership, fundraisers, engagement teams, and operations teams	Scale, standardization, perceived centralization
Weill Cornell Medicine	Development and Engagement leadership, fundraisers, engagement roles, and operations teams	Local autonomy, administrative support

Stakeholder Identification

As part of DEEP change planning, a stakeholder inventory will be developed and maintained to document the individuals and groups impacted by DEEP across Ithaca AA&D (including the Cornell Lab of Ornithology) and Weill Cornell Medicine. This inventory will help segment audiences by role and unit, identify influence and engagement needs, and target change activities appropriately.

The stakeholder inventory will inform core change management deliverables, including the engagement approach, communications planning and audience segmentation, readiness and pulse checks, change impact tracking, training needs analysis, and Change Network design.

- The overarching DEEP change management strategy and engagement approach
- The communications matrix (audience segmentation, timing, sender/voice, and calls-to-action)
- Stakeholder readiness and engagement planning (including pulse checks and targeted outreach)
- Change impact identification and tracking (who is impacted by which process/system changes and when)
- Training planning and needs analysis (role-based curriculum, participation expectations, and support needs)
- Change Network design and coverage (ensuring representation across units and key functional areas)

While DEEP change activities will primarily focus on stakeholders directly impacted by new systems, processes, and ways of working, the stakeholder identification effort will also capture groups that may be indirectly impacted (e.g., leaders and partners who rely on Development and Engagement data, reporting, or services but are not day-to-day CRM users). As appropriate, DEEP updates may be shared with these audiences to build awareness, reinforce the enterprise narrative, and reduce surprises as the program progresses.

Stakeholder Engagement

Stakeholder engagement builds and sustains commitment by creating structured opportunities for involvement, clarity, and feedback. DEEP will prioritize engagement with stakeholders who are most impacted and/or influential across the Development and Engagement community, while ensuring all units are represented as equal partners in design and adoption.

The following groups represent the overarching stakeholder groups directly associated with DEEP:

Stakeholder Group	Role	How do they support adoption?
End Users	Adopt change	<ul style="list-style-type: none"> Read communications and participate in engagement opportunities (e.g., town halls, demos, roadshows, pulse checks). Participate in end-user training and readiness activities. Embrace, adopt, and use DEEP-enabled tools/processes as designed.
Managers	Coach direct reports through change in day-to-day work; both recipients and agents of change	<ul style="list-style-type: none"> Communicate with direct reports and reinforce expectations. Advocate for the change and provide local context. Surface resistance, risks, and capacity constraints early.
Change Network	Share messaging, knowledge, and resources with colleagues within their unit/functional area	<ul style="list-style-type: none"> Gain DEEP knowledge through meetings, resources, and communications. Share knowledge and messages with peers within their unit/functional area. Collect feedback and share with the DEEP Change Lead / Core Change Team.
Core Change Team	Determine and execute the DEEP change management strategy	<ul style="list-style-type: none"> Formulate and adjust strategy as needed based on readiness insights. Identify and escalate adoption risks. Coordinate communication, readiness, and training activities. Celebrate successes and reinforce adoption.
DEEP Project Leadership Team / Workstream Leads	Promote active sponsorship and clearly communicate the	<ul style="list-style-type: none"> Active and visible participation and support. Communicate directly with stakeholders and reinforce key messages.

	“why” and “what’s in it for me?”	<ul style="list-style-type: none"> • Help address resistance and unblock decisions impacting readiness.
Executive Sponsors & Governance Leaders	Launch and sponsor both DEEP and the associated change	<ul style="list-style-type: none"> • Active and visible participation and support. • Build and sustain a coalition of sponsorship across units. • Communicate directly with key stakeholders and leaders.

Participation

To support readiness and successful execution, stakeholders will be expected to engage in DEEP activities (e.g., read key updates, participate in engagement/readiness sessions as relevant, and complete required training). Recognizing limited time and competing priorities, Cornell can cultivate participation using the strategies below:

- **Utilize incentives (as appropriate):** Consider light-touch incentives to increase participation at key moments (e.g., in-person sessions where feasible).
- **Recognize staff:** Use consistent, unit-appropriate mechanisms to acknowledge contributions and milestones.
- **Incorporate DEEP into goals (as appropriate):** Where aligned with unit practices, incorporate DEEP participation into goal setting and performance conversations (e.g., SME deliverables, Change Network responsibilities, training completion).
- **Optional: light gamification:** Use simple, friendly approaches to encourage participation (e.g., milestones for pulse checks or training completion).

Change Network

The DEEP Change Network will consist of representatives from across impacted units to support awareness, readiness, and adoption. The Change Network serves as a structured, two-way channel between the DEEP program and the broader Development and Engagement community across Ithaca AA&D (including the Cornell Lab of Ornithology) and Weill Cornell Medicine.

The Change Network helps ensure DEEP communications and enablement are grounded in unit realities by surfacing questions and feedback early, testing messages, and supporting peers as DEEP activities increase (communications, demos, testing, and training).

Change Network Responsibilities

- Inform the DEEP change strategy by sharing unit-level perspectives, risks, and feedback
- Attend and engage in regular Change Network meetings
- Build awareness and excitement for DEEP within their units and functional areas
- Facilitate two-way communication by sharing DEEP updates with local stakeholders and gathering feedback to bring back to the Core Change Team
- Provide feedback on communications, readiness approaches, and training materials to improve clarity and usability
- Optional participation in testing efforts (as applicable and aligned with project plans)



Change Network Kickoff

A formal kickoff session will launch the Change Network’s participation in DEEP. If feasible, Cornell may consider an in-person kickoff (or hybrid option) to build shared understanding, relationships across the three units, and momentum. Additional periodic touchpoints (in-person or virtual) may be considered to recognize participation and sustain engagement during critical phases of the program.

Change Network Meetings

The Change Network will meet on a regular cadence (e.g., bi-weekly, monthly, with increased frequency during high-impact periods such as testing, training, and go-live). Meeting agendas may include:

- DEEP program updates and key decisions
- Review of upcoming DEEP communications and key messages
- Demonstrations and socialization of emerging changes and impacts (process, policy, roles, and ways of working)
- Discussion of feedback and concerns from units and functional areas
- Fielding questions and identifying FAQs to address through program communications
- Review of readiness insights (e.g., pulse checks) and targeted mitigation actions
- Brainstorming engagement needs or adjustments
- Action items for members to take back to their units (e.g., share an update, promote a readiness activity, encourage training participation, and—where aligned with project plans—support tactical efforts such as user identification, participation in testing/UAT or process design and review (as applicable), and local coordination of feedback collection)

Current Change Network Recommendations

Name	Area Represented	Recommended By
Nicole Cook	Annual Giving	Andrew Gossen
Angela Tracy	College/unit fundraising leader	Andrew Gossen
Adam Murtland	CMP	Andrew Gossen
Anna Woods	WCM	Gloria Kao
Javier Pinto	WCM	Gloria Kao

Emily Anderson	WCM Principal Gifts	Lucille Ferraro
Liz Kinast	Lab of O	Melissa Walker
Jessica Cassidy	Lab of O	Melissa Walker
Brandy Hoover	Finance/Advancement Services/QA	Tracy Cary
Scott Burroughs	Training	Tracy Cary
Bobbi Cirulli	Advancement Services	Tracy Cary
Heather Wells	Alumni Affairs	Debbi K
Casey Lucier	Events	Debbi K/Tracy Cary
Tyler Willcox	Data Strategy and Reporting	Debbi K
Leigh Robert	Technology	Debbi K
Maria Vallejo-Nguyen	Major Gifts	Volunteer report
Catie Fleming	Principal Gifts	Debbi K
Denise Ward	Prospect Development	Debbi K/Volunteer report
Fran Farrell	MGA	CEMI volunteer report
Brandon Thomas	Principal Gifts Associate	CEMI volunteer report
Jeff Stulgis	DFS/WCM Finance	Diane Pierce

Communications Strategy

Objective

DEEP communications will build awareness, trust, and readiness by providing clear, role-aware updates on what is changing, why it matters, what stakeholders should expect next, and how to engage. Communications will be coordinated with broader CEMI communications to reduce noise and reinforce a shared narrative. Where helpful, messages will also explain key decisions and tradeoffs in practical terms and recognize progress and milestones.

Design principles (Cornell DEEP)

- **Two-way:** Create feedback loops, not just message sends.
- **Transparent and practical:** Share what is known, what is still being decided, and what it means in day-to-day work.
- **Role-aware:** Tailor content for fundraisers, engagement roles, operations teams, leaders, and managers.
- **Consistent narrative:** Reinforce a common DEEP story across units, with unit-specific value where needed.
- **Accessible:** Use plain language and point to a single source of truth for details.

What Cornell communications must accomplish

Goal	Strategy to Achieve Goal
Provide proactive, timely, and relevant communication to identified audiences; anticipate questions and concerns.	<ul style="list-style-type: none"> Establish a predictable cadence (e.g., monthly DEEP update) and increase frequency near key milestones (testing, training, go-live). Use a communications matrix to plan and coordinate sends across units (audience, timing, sender, channel, call-to-action). Build “manager reinforcement” moments into the plan (talking points + FAQs for leaders/managers).
Educate stakeholders about process and system changes, changing roles/responsibilities, and what will not change.	<ul style="list-style-type: none"> Use demos, brief videos, roadshows, and targeted messages to explain impacts and benefits in plain language. Translate enterprise benefits into unit-specific value statements for Ithaca AA&D, Weill Cornell Medicine, and the Cornell Lab of Ornithology.
Provide mechanisms for gathering and answering questions and feedback.	<ul style="list-style-type: none"> Leverage the Change Network as a two-way channel to surface concerns and test messaging. Maintain a visible Q&A intake and response process (e.g., online form via the website, FAQ updates). Reserve time for live Q&A during town halls, unit meetings, and training events.
Use consistently worded key messages that explain: why, what, benefits, when, and who to contact.	

Standard key-message components (for consistency)

- **Why** the change is needed (and what problems it solves)
- **What** is changing (and what is not)
- **Benefits** and unit/role relevance (“what this means for me”)
- **When** key milestones occur and what to expect next
- **How to engage** (what stakeholders should do)
- **Where to go for help** (FAQs, intake channel, contacts)

Audiences and “Trusted Voices” (to reinforce messages)

DEEP messages should be reinforced by a mix of leaders, managers, and credible peers. The communications matrix will specify the appropriate “voice” (sender) for each message.

- **Executive sponsorship:** Fred Van Sickle, Vice President, Alumni Affairs & Development, Curt Cole, Chief Global Information Officer
- **Unit leadership reinforcement:** Ithaca AA&D leadership; Weill Cornell Medicine External Affairs leadership;
- **Managers:** people managers asked to cascade key messages and set expectations for participation (meetings, testing, training).
- **Everyday users:** Epic and sprint participants, SMEs, and Change Network members with firsthand knowledge of design decisions and benefits.
- **Project team:** DEEP program leadership and workstream leads.



Communication Vehicles (Cornell)

Communications will follow a hub-and-spoke model: the DEEP site will serve as the single source of truth (the Hub), and all other vehicles will drive stakeholders back to the Hub for full details (“post once, link often”). This approach reduces long-form email threads, keeps information current for new joiners, and supports consistent messaging across Ithaca AA&D, Weill Cornell Medicine, and the Cornell Lab of Ornithology.

- **DEEP site (Hub / single source of truth):** The authoritative, public-ready destination for project overview, roadmaps, FAQs, news/updates, key dates, and an archive of communications. All major updates originate here.
- **Monthly “DEEP Update” (Megaphone):** A newsletter-style message (via Marketing Cloud) that curates brief teasers and links back to Hub posts—used for predictable cadence updates and time-sensitive alerts.
- **SharePoint workspace (Workshop):** The secure, work-in-progress space for the core working group and design teams—used for high-velocity collaboration, drafts, technical specs, and living documents before they are “public-ready.”
- **Town halls:** Cornell-wide forums with demos, progress updates, and live Q&A—used at key milestones to build shared understanding across units.
- **Unit roadshows / existing staff meetings:** Brief, embedded segments within Ithaca AA&D, Weill Cornell Medicine, and Lab meetings to localize impacts, reinforce messages, and capture questions.
- **Manager toolkit:** Ready-to-use talking points, slides, FAQs, and “what to expect next” notes to enable consistent cascade communications and set participation expectations.
- **Feedback channels (Sensor / feedback loop):** A shared DEEP inbox and simple intake form for questions and issues. Themes will be monitored to identify confusion points and prompt FAQ/site updates on the Hub.

Communications Matrix

A communications matrix will be used to plan and manage all DEEP communications across the project lifecycle. At minimum, it will track:

- Timing (month) and target date
- Audience(s) and unit
- Message category (awareness, readiness, training, go-live, sustainment)
- Vehicle/channel
- Sender/voice and content owner
- Call to action and link to archived communication

“MONTHLY” CEMI-DEEP News Update

To provide regular updates without overwhelming stakeholders, Cornell should issue a predictable, newsletter-style update (monthly by default). Suggested sections include:

- Progress and key decisions (what changed since the last update)
- Upcoming milestones and what stakeholders should expect next
- “What this means for me” spotlight by role (fundraiser, engagement, operations)
- Ways to engage (demos, testing opportunities, office hours)
- Recognition/shout-outs for SMEs and Change Network contributors



Communication Development and Review Process

DEEP communications should follow a lightweight, repeatable drafting and approval workflow. The communications matrix will document reviewers and deadlines per communication, but the standard process should include:

Step	Description	Owner
1	Draft content based on the communications matrix (objective, key messages, audience, call to action). Create a consistent method for collecting updates from AA&D, Weill Cornell Medicine, and Cornell Lab	Communications lead(s) + Unit leads Andrew Gossen
2	Review for accuracy, tone, accessibility, and alignment with Cornell brand/house style.	Communications lead(s) Michael O'Neill, Beth Goelzer, Gloria Kao, Melissa Walker
3	Functional validation of key facts (scope, timing, impacts, actions).	DEEP program leadership / workstream lead / implementation team Executive Director, Advancement Information Systems, Tracy Cary, Gloria Kao, Melissa Walker, Trish Davis, Devaki Glinde
4	Final approval and confirmation of the sender's voice.	Executive sponsor or delegate Tracy Cary
5	Deploy via the identified channel(s) and archive the final communication to the DEEP site.	Comms owner + channel owner Michael O'Neill

Feedback and Measurement

The project will regularly solicit feedback to confirm communications are reaching stakeholders and resonating. Input will include Change Network feedback, questions received via online intake channels, and periodic pulse checks (e.g., readiness surveys). Where technically feasible, Cornell should also track engagement (open/click rates, attendance at events, page views) to identify where message reinforcement is needed.

System Naming / Branding (recommended)

To promote shared language and excitement, Cornell may consider defining a memorable name for the DEEP-enabled future-state CRM experience (or major platform components). If Cornell pursues this, confirm:

- Whether a formal naming/branding effort is desired (contest vs. leadership decision)
- Timing for announcing the name (aligned with an early milestone, such as initial demos)
- Brand assets and how they will be used (templates, slide headers, virtual backgrounds, internal collateral)

Content That Should Live on the DEEP Website (single source of truth)

To keep email communications brief, detailed information should live on the DEEP site and be referenced via links. Recommended content:

- Project overview, purpose, scope, timeline, and governance
- Archive of all DEEP communications
- Upcoming events calendar (town halls, roadshows, office hours)
- Question and Intake form to gather questions and feedback from the DEEP community
- FAQs and “what’s changing / what’s not” summaries
- Recognition portal (as available): a place to highlight contributions, milestones, and shout-outs across units
- Change Network roster and role (as appropriate)
- DEEP advances the goals and key performance indicators (KPIs) of Ithaca, Weill Cornell Medicine, and the Cornell Lab of Ornithology by enabling more consistent engagement, improved data quality and reporting, and more efficient, shared ways of working.

Optional: Short Informational Videos (not training)

Short videos ≤3 minutes can communicate progress and build familiarity. If Cornell elects to produce videos, the communications matrix should specify purpose, timing, and narrator. Likely candidates include: an overall project introduction; sprint highlight demos; and role-based “what this means for me” segments. Video narrator(s) should be intentionally selected and may include leaders or credible peers.

Organizational Readiness



Organizational readiness activities help Cornell prepare stakeholders to adopt DEEP-enabled changes by clarifying what is changing, what is expected of different roles, and what support will be available as new tools and ways of working are introduced.

Organizational readiness activities for DEEP:

- Are closely integrated with the DEEP delivery plan and the functional/workstream work defining future-state processes, roles, and policies
- Involve key stakeholders, especially those with deep knowledge of current operations and unit context
- Consider both shared enterprise needs and unit-specific differences across Ithaca AA&D (including the Cornell Lab of Ornithology) and Weill Cornell Medicine

- Maintain flexibility to accommodate evolving configuration decisions, policy outcomes, and implementation sequencing

Proposed key activities for the DEEP readiness effort include:

- **Change Impact Analysis:** Conducted iteratively to determine the depth and breadth of changes introduced by DEEP (process, policy, roles/responsibilities, and technology) and to identify who is impacted, when, and how.
- **Organizational Readiness Assessments (Pulse Checks):** Periodic checkpoints to measure awareness, confidence, engagement, and perceived preparedness, and to identify barriers requiring targeted mitigation.
- **Readiness Activities / Workshops:** Activities designed to prepare stakeholders for upcoming change, socialize terminology and expectations, and create opportunities for Q&A and feedback.

Change Impact Analysis

A Change Impact Analysis will be conducted to determine the depth and breadth of changes involved with each major component of DEEP for Development and Engagement staff. This analysis will help Cornell determine which stakeholders are most impacted by each change and to what degree, identify aspects of the change that may be difficult, and identify where change may be readily embraced. The results will inform readiness, communications, and training strategies targeted to specific audiences and unit contexts.

What Constitutes a Change Impact

Change impacts are focused on business processes, policy, and behavioral changes that are not already a core component of the technology configuration itself. Many process differences across Ithaca AA&D, Weill Cornell Medicine, and the Cornell Lab exist today because each unit operates on different systems with different workflows. When DEEP introduces a single, shared platform, core transactional processes (e.g., gift processing, biographical record management) will be standardized as part of system configuration; that standardization is the technology change.

The change impact analysis focuses on the adjacent and downstream processes that will also need to shift because of that standardization, processes that may not be explicitly designed in a sprint but are nonetheless disrupted. Examples include:

- How gift documentation is stored and shared: each unit currently handles this differently based on their current core system's capabilities (e.g., local file shares, SharePoint, email attachments). DEEP will require a consistent approach to document management, which represents a process and behavioral change beyond the technology itself.
- How teams conduct quality control or batch reconciliation: manual workarounds and custom tools will be replaced by native platform capabilities, requiring teams to adopt new workflows and retire legacy habits.
- How units coordinate handoffs between functional areas: with three units merging onto one platform, the sequencing, approval chains, and communication norms between gift processing, stewardship, prospect management, and donor relations will shift even where the system "screen" looks the same.
- Policy and governance implications: shared data definitions, access controls, and reporting standards that may require new or revised policies.

Sprint-Level Ownership and Collection Process

Change impacts will be identified and logged during each epic/sprint cycle, not as a one-time exercise. This approach ensures that impacts are captured as close to the design of conversation as possible, when the differences between current and future state are most visible.

- **Designated Change Impact Owner(s):** Each epic/sprint will have a designated Change Impact Owner (or co-owners) responsible for identifying and documenting change impacts. This person should be embedded in or closely aligned with the functional design team for that sprint, ideally a Change Network member or a functional SME who understands the current-state process across all three units.
- **How Impacts Are Identified:** Owners should actively listen during future-state process design sessions, sprint demos, configuration walkthroughs, and customer confirmation sessions for moments where the future state diverges from current practice, especially where that divergence is not the direct result of a system configuration decision but a consequence of it. The test: If you have the question 'is this a change impact?', most likely the answer is yes. No change impact is too small. The goal is to surface and document every process, policy, or behavioral shift, not just the ones that appear on a sprint demo.
- **Validation Cadence:** Change impacts will be reviewed with functional/workstream leads at the close of each sprint to confirm accuracy, completeness, and alignment with the intended future state.
- **Core Change Team Review:** The DEEP Core Change Team will review the cumulative log on a regular cadence to identify cross-unit patterns, escalate risks, and inform communications and readiness activities.

Change Impact Log

Change impacts will be captured and maintained in a DEEP Change Impact Log using a template provided by Huron and handed off to Cornell. Cornell will own responsibility for updating and maintaining the log over time. The log will be reviewed regularly by the Core Change Team and used to inform communications and readiness activities as DEEP milestones approach.

At minimum, the Change Impact Log should capture:

- Date identified
- Functional area / department
- Business process / workflow
- Impact level (high/medium/low)
- Change description (current state)
- Change description (future state)
- Impacted unit(s) (Ithaca AA&D / Weill Cornell Medicine / Cornell Lab)
- Impacted role group(s)
- Benefit(s) (as applicable)
- Anticipated challenges and adoption risks (as applicable)
- Process or policy implications (Y/N)
- Role changes (Y/N)
- Additional notes (for reference)

Criteria for Determining Level of Impact

Level of Impact	Criteria
High	<ul style="list-style-type: none"> • Major changes to job roles and responsibilities • Significant changes to work processes, tools, skills, and knowledge

	<ul style="list-style-type: none"> • High disruption risk and/or meaningful cross-unit dependencies
Medium	<ul style="list-style-type: none"> • Small-to-moderate changes to work processes, tools, skills, and knowledge • Changes require learning and practice but are manageable with standard enablement • Limited cross-unit dependency risk
Low	<ul style="list-style-type: none"> • Minimal change to daily work • Changes may be downstream/indirect (e.g., data or reporting changes that inform others' work) • Impact may be superficial or incremental

Organizational Readiness Assessments (Pulse Checks)

The purpose of readiness assessments is to measure the level of preparedness of conditions, attitudes, and stakeholders at various checkpoints as Cornell prepares to implement DEEP-enabled change. Given the scale of DEEP and the breadth of impacted stakeholders across three units, it is critical to gauge and track readiness throughout implementation to validate that the community is on track for adoption and to identify where it may be appropriate to intervene or adjust the change strategy. Early kickoff polling suggests a consistent “team readiness gap” (personal readiness trending higher than perceived team readiness), reinforcing the need for manager reinforcement, local enablement, and practical opportunities to build confidence.

Readiness data may be collected through a combination of surveys (pulse checks) and targeted interviews/focus groups. Surveys provide scalable checkpoints; interviews/focus groups can be used selectively to deepen understanding of barriers, resistance points, and unit-specific needs.

Readiness assessments should collect basic segmentation information (e.g., unit affiliation and role group) and ask stakeholders to rate a consistent set of statements over time to establish a baseline and track progress. Example statements include:

- I understand the goals and objectives of DEEP.
- I believe Cornell leadership is supportive of DEEP.
- I understand how DEEP will impact me and my work.
- I know where to find information about DEEP and where to ask questions.
- I believe I will receive the training and support I need to be successful with DEEP-enabled processes and tools.
- I am committed to becoming proficient in the new tools and ways of working.

Reducing Survey Fatigue

- Leverage the Change Network to raise awareness and encourage participation
- Send targeted reminders through managers and unit leadership
- Keep pulse checks brief and purposeful
- Promote transparency by sharing high-level findings and “what we’re doing about it” actions
- Consider light-touch incentives for participation (as appropriate)

Based on the expected implementation timeline, Cornell change leadership should determine an appropriate interval to administer the surveys and align with specific project milestones. Additional rounds of the survey may be necessary; leadership to determine.

Round	Timing	Purpose
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1	<ul style="list-style-type: none"> Note any dependencies before administering 	<ul style="list-style-type: none"> Create baseline for future assessments Determine early effectiveness of launch communication, CRM Newsletter, and DEEP website Determine whether mitigating actions are needed
2	<ul style="list-style-type: none"> Note any dependencies before administering 	<ul style="list-style-type: none"> Measure progress against baseline Determine effectiveness of change strategy Determine whether mitigating actions are needed
3	<ul style="list-style-type: none"> Note any dependencies before administering 	<ul style="list-style-type: none"> Measure progress Determine effectiveness of any implemented mitigating actions Determine whether additional adjustments are needed Identify any critical end user training considerations (may require the addition of open-ended questions)
4	<ul style="list-style-type: none"> Note any dependencies before administering 	<ul style="list-style-type: none"> Measure change program success Identify any additional or critical mitigating actions Determine whether additional training opportunities or materials are desired (may require the addition of open-ended questions)

After each readiness assessment, the Core Change Team will:

- **Review results:** Review results segmented by unit and role group and identify key risks/barriers
- **Adjust strategy:** Update readiness activities, communications, and training plans based on findings
- **Facilitate targeted follow-up:** Conduct focused discussions where deeper insight is needed
- **Share findings:** Provide a high-level summary to leaders and stakeholders, including mitigations and next steps

Readiness Activities / Workshops

Readiness activities help stakeholders prepare for upcoming process, workflow, and policy changes; identify any new responsibilities; and build confidence by creating structured opportunities to learn, ask questions, and practice. Readiness activities will be aligned to DEEP milestones (e.g., design completion, testing cycles, training windows, go-live readiness) and may include:

- **DEEP Town Halls:** Cornell-wide sessions to provide program updates, share demos, introduce key changes, and conduct Q&A. Where helpful, these may include panels featuring SMEs or “everyday users” who can share practical impacts.
- **Unit roadshows / existing staff meetings:** Short, targeted segments embedded into Ithaca AA&D, Weill Cornell Medicine, and Cornell Lab meetings to provide unit-relevant updates and address local questions.
- **Lunch and learns / demos:** Informal sessions to showcase system capabilities and highlight what is changing (and what is not).
- **Short informational videos (optional):** Brief, non-training videos to share highlights, progress, and major changes in a digestible way.

Across all readiness activities, Cornell should:

- **Collect feedback:** Ensure every activity includes an avenue for questions and feedback
- **Promote transparency:** Where appropriate, acknowledge likely challenges and learning curves in addition to benefits

- **Make examples relatable:** Use scenarios grounded in real advancement work and role-specific needs

Training, Knowledge Transfer, and Sustainment

Training Approach (Cornell DEEP)

DEEP will introduce new tools, processes, and ways of working for Development and Engagement staff across Ithaca AA&D (including the Cornell Lab of Ornithology) and Weill Cornell Medicine. As a result, role-based training and enablement will be required to support adoption, minimize disruption, and accelerate time to proficiency. This section outlines the recommended approach and considerations for DEEP go-live training, as well as how training will be sustained as DEEP capabilities evolve.

This training approach focuses on go-live readiness while setting Cornell up for ongoing onboarding and sustainment post go-live. Stakeholder feedback indicates that hands-on exposure (demos, practice scenarios, and visual examples) will be important for building confidence. Training content, schedule, and delivery methods will be refined as configuration decisions are finalized, and change impacts are confirmed.

Key training tasks and activities include:

- **Identify training resources and roles:** Confirm training ownership, roles, responsibilities, and resourcing across the three units.
- **Conduct a Training Needs Analysis (TNA):** Identify the processes and functionality that require training, who needs it, and what enablement of assets are required.
- **Confirm training delivery methods:** Select the right mix of instructor-led, virtual, and self-service reinforcement approaches based on audience needs and capacity.
- **Design, develop, and review training content:** Develop training content and supporting change impact materials (e.g., job aids) aligned to agreed future-state processes and system configuration.
- **Registration and attendance tracking (as needed):** Determine how training participation will be tracked and how completion ties to go-live readiness activities.
- **Deliver training and publish materials:** Deliver training and ensure materials are available in a central location for easy access.
- **Support training post go-live:** Provide structured go-live support and reinforcement to help users apply learning in real work.
- **Outline a training sustainment plan:** Establish how training materials will be maintained and updated as enhancements, releases, and process changes occur.

Training Needs Analysis (TNA)

A Training Needs Analysis should be completed iteratively as DEEP design progresses to identify which business processes require training, which roles are impacted, and what training format(s) are most appropriate. The TNA will be informed by the Change Impact Log and validated by relevant workstream leads and SMEs.

At minimum, the TNA should capture:

- Process / workflow name
- Impacted role groups and unit(s) (Ithaca AA&D / Weill Cornell Medicine / Cornell Lab)
- Learning objectives / outcomes
- Recommended training modality (instructor-led, virtual, self-paced reinforcement)

- Required training assets (e.g., instructor guide, deck, job aid, quick reference, FAQ)
- Timing dependency (e.g., aligned to testing, UAT, go-live)
- Trainer/facilitator and SME reviewer(s)

Training Delivery (Instructor-led, Scenario-based)

Instructor-led, scenario-based training is recommended as the primary modality for go-live readiness, supported by job aids and quick reference materials. Training should be designed around realistic Development and Engagement workflows and role-specific scenarios so staff can practice how they will use DEEP in their day-to-day work.

As details are finalized, Cornell should confirm the appropriate mix of:

- **Virtual instructor-led sessions** for broad reach and scheduling flexibility
- **In-person sessions** where beneficial for hands-on learning and peer support (as feasible by unit)
- **Role-based training tracks** (e.g., fundraisers, engagement staff, operations, reporting)

Where possible, training should include knowledge checks or practice activities to reinforce retention and confidence.

Training Materials (Recommended)

To supplement instructor-led training and support post-go-live proficiency, Cornell should develop a set of concise, reusable enablement assets. Extensive “user manuals” are generally not recommended; materials should be practical, searchable, and designed for quick reference.

Recommended materials include:

- **Instructor guide / lesson plan:** Session learning objectives, agenda, demo steps, scenarios, and key reminders for facilitators
- **Job aids (1–5 pages):** Step-by-step guidance for key tasks (single process per aid where possible)
- **Quick references / “cheat sheets”:** Terminology, navigation basics, common workflows, and tips
- **Short refresher videos (optional):** Brief, targeted refreshers for high-frequency activities (not a substitute for training)

All final materials should be stored in a central location for end users to access, with clear organization and naming conventions to support quick searching.

Design, Develop, and Review Training Content

Templates and Tools

The training team will create templates for each of the training materials to be utilized throughout design and development. Design principles and style guidance for templates should be consistent, easy to follow, and reusable post go-live for future training delivery and resource creation.

A training content development tracker should be used to manage and track all materials. At minimum, the tracker should include:

- Training asset (e.g., instructor-led content, job aid, quick reference, short refresher video)
- Business process / workflow
- Development status
- Responsible SME

- Anticipated audience (role group and unit)
- Draft owner and draft date
- Reviewer(s) and review date
- Final approval owner and approval date

Training Design and Development

The purpose of training design and development is to create training content for each DEEP training topic identified in the Training Needs Analysis. Training design should:

- Utilize defined design standards and style templates for training materials
- Identify and articulate clear learning objectives for each training session and asset
- Outline step-by-step processes (including screenshots and instructions as needed)
- Use realistic, best-practice scenarios aligned to common advancement workflows
- Ensure content reflects agreed future-state business processes, policies, and configuration

Review Training Content

Reviews of training content should occur at multiple points in the design and development process to ensure changes in DEEP solution design and/or advancement policies or procedures are addressed. Major rework should be limited after the first full draft review; however, minor updates are expected as testing progresses, and the solution design is finalized. Final approval of training materials should occur after UAT and/or other final validation checkpoints.

As DEEP workstreams progress and training materials are developed, questions related to policy or procedure may arise. These questions should be documented in the Change Impact Log and Training Needs Analysis and routed to the appropriate stakeholders for resolution so materials can be updated accordingly.

Training Preparation Timeline (Recommended)

Training activities should be planned backward from go-live, with content development and validation aligned to configuration finalization and testing outcomes.

Task	Activity	Timing
1	Track change impacts	Ongoing
2	Conduct Training Needs Analysis	Ongoing
3	Determine desired training assets	Ongoing
4	Draft job aids / quick references (initial drafts)	Ongoing (update prior to go-live as configuration finalizes)
5	Review, update, and confirm training plan	~6–9 months before go-live
6	Draft instructor-led training content	~4–6 months before go-live
7	Define go-live support plan (office hours, help channels)	~3–4 months before go-live
8	Review and update training content; conduct training pilots	~2–4 months before go-live
9	Deliver end-user training	~1–2 months before go-live
10	Develop training sustainment plan	~1–2 months before go-live

Conduct Training Pilots

All identified trainers for instructor-led sessions should participate in pilot deliveries to practice facilitation and refine timing, scenarios, and supporting materials. Pilots should mirror the planned delivery format (in-person and/or virtual) and include a live audience of appropriate functional team members. Change

Network members should be invited where feasible, and feedback should be actively solicited and incorporated prior to broader delivery.

Deliver Training

Instructor-led training will be delivered based on the final schedule, curriculum, and lesson plans. Questions, feedback, and enhancement suggestions should be documented and reviewed for incorporation into post-go-live support materials and sustainment training.

Publish Training Content

Once training materials have been finalized, content should be posted to Cornell's designated central location(s) for end users to access (e.g., the DEEP single source of truth site and/or the learning/training platform used for delivery). Materials should be organized so they are easy to find and reuse (e.g., by role, process area, and task).

Training Attendance and Registration

Cornell should confirm whether training completion will be required prior to DEEP access and/or as part of go-live readiness expectations. If training is required, attendance should be tracked and monitored to ensure completion expectations are met across Ithaca AA&D (including the Cornell Lab of Ornithology) and Weill Cornell Medicine.

Once training delivery logistics are confirmed (e.g., individual registration for specific dates/times versus leveraging existing unit meetings), an associated registration and tracking method may be required. Cornell should also define accommodations for individuals whose schedules do not align with planned sessions (e.g., alternate sessions, recordings where appropriate, or targeted make-up opportunities).

Evaluate the Training Program

Training evaluation should occur throughout the delivery period. Cornell should consider distributing a brief evaluation survey after each training session to:

- Gather overall feedback on training effectiveness to improve future sessions
- Validate whether participants absorbed key concepts (and where reinforcement is needed)
- Identify early indicators of post-go-live support needs and potential sustainment training topics

In addition, results from the post-go-live readiness assessment(s) (recommended 1–2 months after go-live) can provide further insight into training effectiveness, remaining gaps, and the need for additional reinforcement.

Testing as an Early Training Opportunity

Testing activities (including sprint testing and UAT) provide an early opportunity for future users to become familiar with DEEP functionality and workflows. Where appropriate and aligned with the DEEP testing strategy, participation by Change Network members and selected end users can support both solution validation and readiness.

Training Participation and Completion

Cornell should confirm expectations for training participation, how completion will be tracked, and how training readiness will be communicated to leaders and managers. Leaders and managers play an important role in reinforcing training participation expectations and helping staff plan time for training.

Go-Live Support and Reinforcement

Ahead of go-live, Cornell will define a go-live support plan (hypercare) to help users apply training in real work and to reinforce readiness after training is completed. The plan may include:

- **Office hours:** Drop-in sessions for questions and practice
- **Embedded support (as needed):** Targeted support within high-impact teams during early transition
- **Q&A and intake process:** Clear method for submitting questions and expected response times
- **Refresher sessions:** Short sessions on critical, high-frequency tasks soon after go-live
- **Advanced training (optional):** Deeper sessions for specialized topics after initial stabilization

Cornell should confirm hypercare duration, support roles (including how unit operations teams participate), escalation paths, and how recurring issues and FAQs will be captured and communicated. Change Network members may also help by directing peers to support channels, sharing common questions, and reinforcing key tips during early adoption.

Training Sustainment Plan

A training sustainment plan will be developed roughly 1–2 months ahead of go-live. The purpose of the training sustainment plan is to ensure post go-live changes, updates, and enhancements are incorporated into available training materials and reinforcement resources.

Over time, periodic updates to the Salesforce platform and other DEEP-enabled/vendor software may introduce changes that impact business processes, configurations, and the end-user experience (e.g., user interface, navigation, and reporting). In addition to vendor releases, Cornell may continue to implement new DEEP features and enhancements and/or introduce policy and procedure updates that affect how Development and Engagement staff work.

The level of these impacts will vary and will need to be tracked and assessed. Pertinent updates should be reflected in training materials and job aids, communicated to stakeholders through established channels, and supported with additional training or targeted refreshers when warranted based on impact level and audience needs.

Consideration will also need to be given to ongoing, operational training for new hires and how training expectations and delivery may differ across Ithaca AA&D, Weill Cornell Medicine, and the Cornell Lab of Ornithology. Cornell should define a repeatable onboarding approach (e.g., role-based learning paths, on-demand materials, and periodic scheduled sessions) while allowing for unit-specific supplementation where needed (for example, one unit may choose to deliver additional local training sessions to address unique processes or stakeholder needs).

Go-Live Celebration

DEEP is a multi-phase transformation that will require sustained effort and collaboration across Ithaca AA&D (including the Cornell Lab of Ornithology) and Weill Cornell Medicine, including significant time commitments from staff participating in governance, functional/workstream activities, testing, training, and deployment readiness.

To recognize this effort, it is recommended that Cornell plan a DEEP go-live celebration. This celebration provides an opportunity to thank staff for their contributions, recognize the time and commitment required to reach go-live, and help sustain momentum during the early transition period. Given Cornell's distributed structure, intentional planning should ensure participation and recognition spans all impacted units and functional areas.

Success Metrics and Measurement

Tracking progress is critical to evaluating DEEP success, both post go-live and throughout the implementation. Cornell should define and maintain a set of success metrics that monitor project outcomes (e.g., system and process performance) as well as the effectiveness of organizational change management activities (e.g., readiness, engagement, and training completion).

Cornell may consider organizing DEEP success metrics into themes such as:

- Build and maintain a best-in-business CRM and supporting ecosystem
- Create a comprehensive, trusted view of constituents
- Make data actionable through reporting, insights, and self-service capabilities
- Drive adoption and best practices across units

While many DEEP metrics will be measured post go-live, Cornell should also identify a focused set of metrics to track change management progress during implementation (e.g., communications reach, participation in readiness activities, pulse check results, training attendance/completion, and go-live support utilization). These metrics should be defined in a tracking matrix, reviewed regularly by DEEP leadership, and used to inform mitigation of actions and adjustments to the change approach.

Additional Recommendations

Throughout this strategy, references may be made to events, recognition, or other tangible items (e.g., kickoff sessions, in-person meetings, celebration moments, or light-touch incentives). If Cornell chooses to pursue these recommendations, it is prudent to confirm an appropriate budget and approval process to cover associated expenses across the three units.

Risks of Insufficient Change Management

Without sustained change management, DEEP risks:

- Inconsistent adoption across units
- Increased reliance on workarounds
- Prolonged productivity impacts
- Reduced confidence in future CEMI initiatives

This strategy mitigates those risks through integrated governance, leadership engagement, and sustained enablement.

Change Log

Version	Date	Author	Comments
.01	2026-04-03	Huron	Initial draft strategy
.02	2026-04-28	Huron	Revised draft strategy according to comments from Cornell review and onsite feedback
.03	2026-05-01	Huron	Revised draft strategy according to insights from set of principles document drafted for Fred Van Sickle to distribute
.04	2026-05-04	Huron	Revised draft strategy according to edits from Tracy Cary upon finalization of email drafted for Fred Van Sickle to distribute



Cornell Experience Modernization Initiative (CEMI) Donor and Engagement Experience Project (DEEP)



.05	2026-05-25	Huron	Finalized North Stars, Operating Principles, and Decision-Making principles
1.0	2026-05-27	Cornell	Finalized version, signed off by Cornell