

Engagement & Stakeholder Collaboration

Digital Transformation partnership



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The Context



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Lay of the Land

- Moving from endowment dependency to operating as a 'Fundraising Charity' meant **we need to change**
- **Charity brands in their infancy**
- Pivoted the Digital Team **from generalists to specialists** - some wins under our belt
- As interim Director successfully submitted **Digital Marketing & Maturity strategy**
- Early stages of our **10-year FR strategy**
- **Historical silos/breakdown at ELT** - cascading to teams
- **Briefed and partnered with William Joseph** to bring Maturity strategy to life
- A more central Foundation-wide tech transformation project was in development

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Prepare for candid commentary!



The Challenge

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What needed to be different for us?

- Avoid strategy development being a process where each department defends its territory
- Strategy being a compromise document that changes nothing fundamental
- An objective process that interrogates what we should be doing, grounded in user need - not departmental optics
- Plug the gap between FR/marketing aspirations and tech/system dependencies
- Prevent defensive positioning to enable people-centred digital transformation
- Wider director changes - necessary, but came with its own challenges



**Self-serve can be shorthand for 'get out of my way'.
Sometimes that is what people think about self-
serve because they are not seeing the value-add
that expertise can bring to their issue.**

Internal stakeholder



We don't know who our audience is. There are lots of assumptions and it feels like we don't know who we are targeting and why, or even if the messages are landing.

Internal stakeholder



The lack of consistency in how we work, especially with platforms and processes frequently changing, can make cross-team collaboration even more challenging.

Internal stakeholder



It's not just the supporters' experience, it's actually the staff's experience because it's hard work and a real struggle to do things internally.

Internal stakeholder



We are not outsourcing accountability.

Internal stakeholder

DO THE RIGHT THING

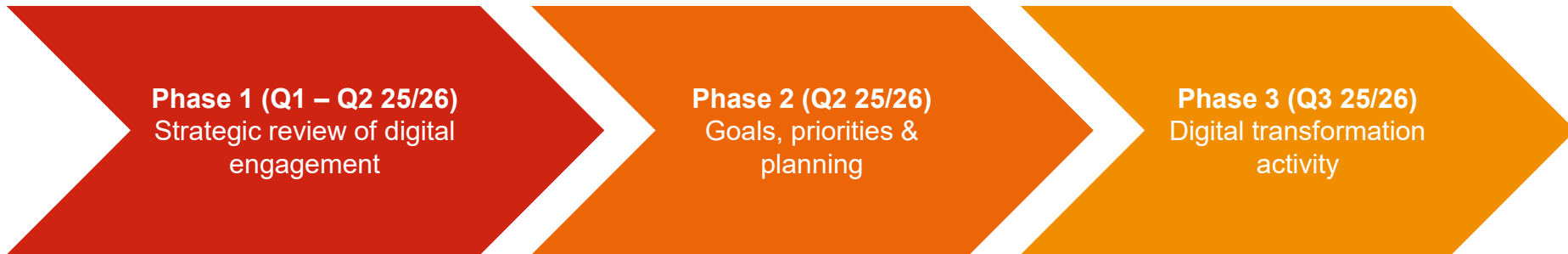
**Our approach
and choices**



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Recap of approach



Phase 1 (Q1 – Q2 25/26)
Strategic review of digital engagement

- Digital data and analysis
- Digital maturity process
- Stakeholder engagement
- Audience research
- External sector and trends insight
- Tech strategy (GSTF) alignment

Phase 2 (Q2 25/26)
Goals, priorities & planning

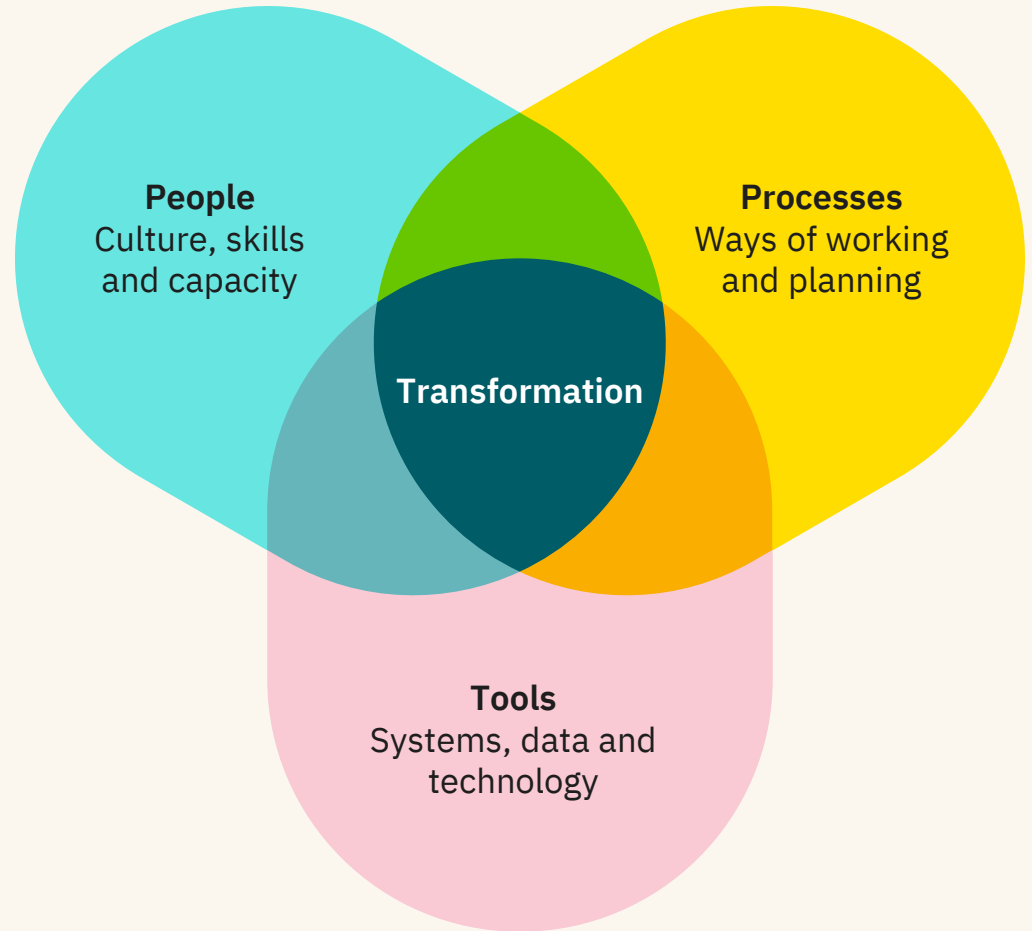
- Digital transformation goals
- Objectives and key results (OKRs)
- Roadmap / prioritisation
- **Strategic decision diagnosis – CCC Toolkit**

Phase 3 (Q3 25/26)
Digital transformation activity

- Roadmap implementation
- Steering group / Communities of practice - cadence

Digital transformation

Our digital transformation approach combines people, processes and tools to enable practical, sequenced action and accelerate growth.



**Digital Maturity -
what it means for
us**



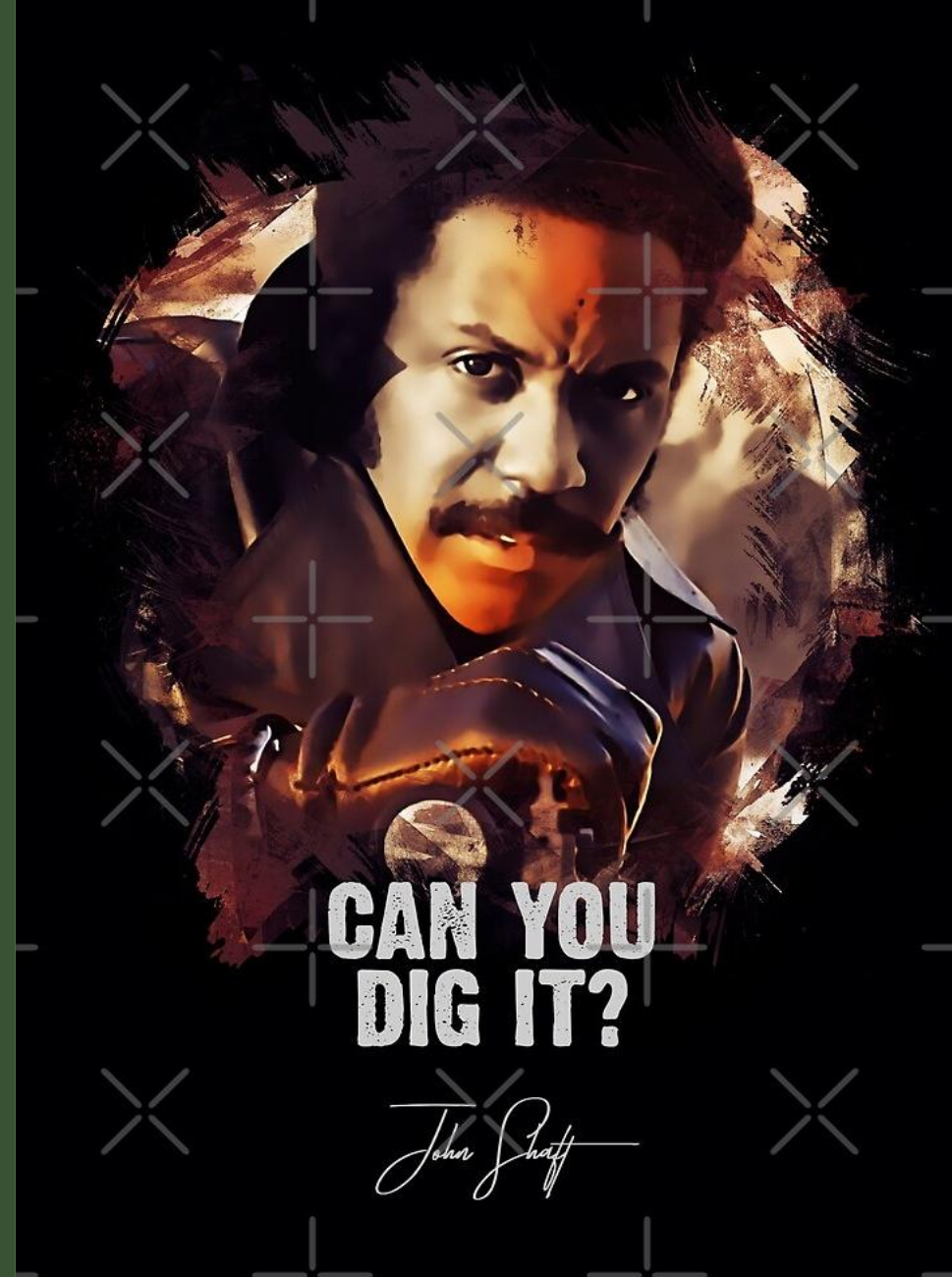
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What and Why?

- Digital maturity is an approach that measures digital strategy effectiveness
- This runs **deeper than just performance data * can you dig it***
- It instead measures the how: **people, processes, channels, capabilities, skills and ways of working.**
- Digital maturity goals are **not team or department specific**
- The digital maturity process **is open, transparent, inclusive** - building cases for investment (both financial and effort) in people, processes and tools
- **We needed a tool** to evidence, review and benchmark our categorical growth on an annual basis - fed by survey data/audit

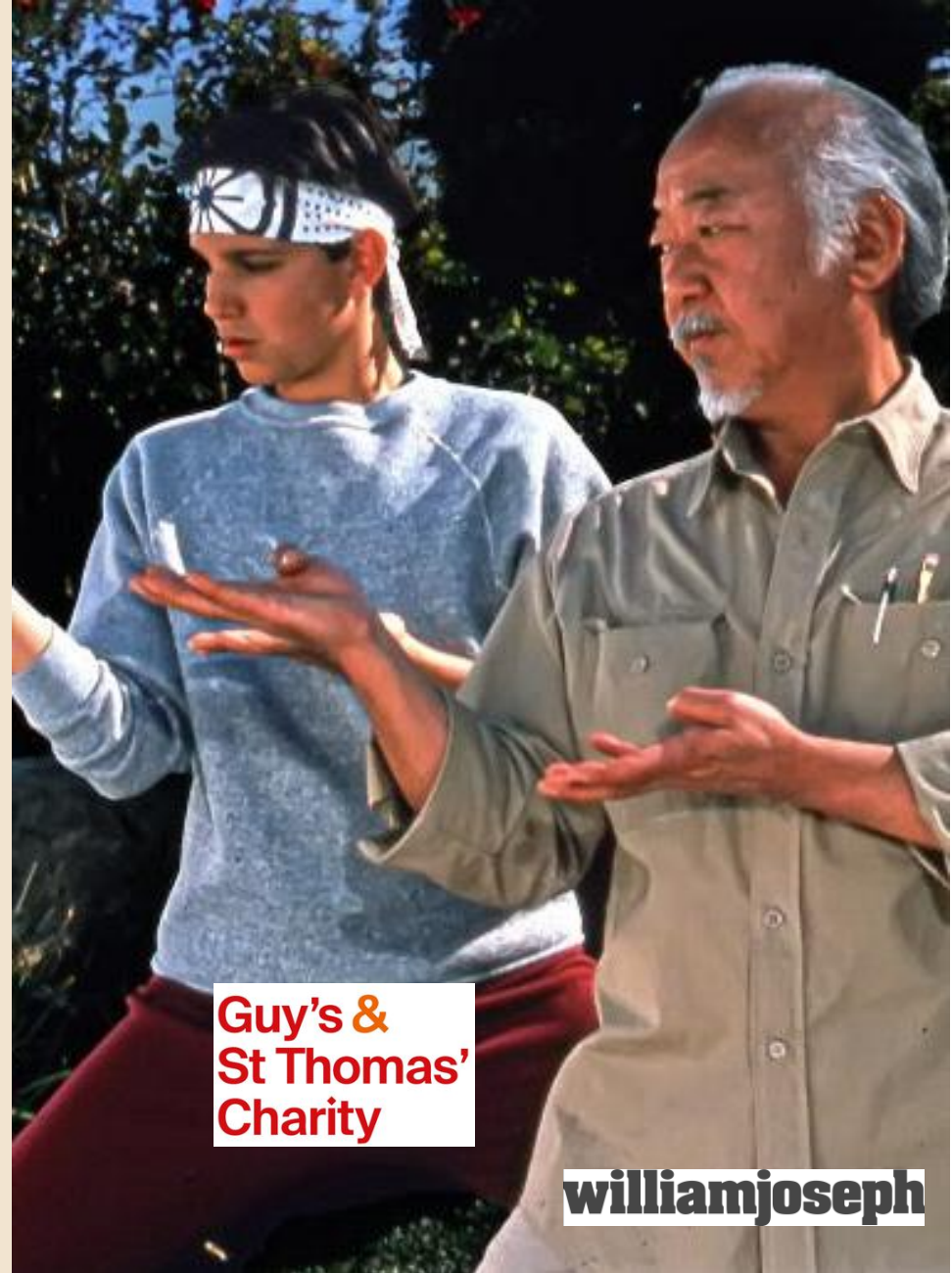
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Wax on, wax off

- A fit for purpose model, anchored in organisational goals and context
- An iterative process with reflections and realistic milestones for each stage of our maturity
- A tangible shared understanding, alignment and commitment on where we are and where we want to be

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Digital maturity categories aligned with problems statements

1. Digital content and storytelling

The GSTC team lacks a consistent content strategy that aligns with fundraising goals and audience needs. This limits the ability to feed our digital channels with impactful, audience-specific content and hampers our organic growth.

2. Digital analytics and insight

There is insufficient access, management and processes for data and reporting tools across teams. This limits teams' ability to assess the impact of their digital efforts, learn from data, and optimise campaigns effectively.

3. Culture and ways of working

A lack of clarity around roles, responsibilities, and autonomy, especially for fundraisers, prevents teams from feeling empowered to act. There is also inconsistent understanding of how evaluation and learning fits into project work, which hinders effective test-and-learn culture.

4. Digital marketing and optimisation

Current platforms and tools do not support seamless automation, reporting or donor stewardship, limiting opportunities for coordinated digital fundraising.

5. Digital skills, capabilities and leadership

Fundraisers do not consistently have the skills or confidence to self-serve or co-create digital journeys. There is a need for clearer guidance, upskilling, and shared tools to enable collaborative planning and delivery across digital platforms.

6. User experience and digital journeys

There is limited visibility into supporter journeys and insufficient data to guide decision-making. The absence of integrated metrics, behavioural data, and user feedback prevents the team from tailoring journeys based on audiences' experiences.

7. Digital innovation and experimentation

Without a clear prioritisation framework, teams feel disempowered and unable to test or adopt new products.

8. Data management, tools and technology

The current tech stack is fragmented, with separate tools, platforms and processes across teams. This lack of integration, particularly for CRM and email platforms, creates barriers to accessing usable data, automating processes, and scaling supporter engagement.

Digital maturity results

Scores

Scores reflect:

- digital maturity survey results
- stakeholder engagement insight
- digital data analytics
- user research insight
- external sector trends and benchmarks

The higher scoring categories are consistent with discovery insight that these areas have made headway, particularly over the last 6 to 12 months.

Some of these categories include some survey responses from levels 1- 3.

| Category | Score |
|--|-------|
| 1. Digital content and storytelling | 1 |
| 2. Digital analytics and insight | 2 |
| 3. Culture and ways of working | 1 |
| 4. Digital marketing and optimisation | 2 |
| 5. Digital skills, capabilities and leadership | 1 |
| 6. User experience and digital journeys | 2 |
| 7. Digital innovation and experimentation | 2 |
| 8. Data management, tools and technology | 1 |

Digital maturity results

Digital growth recommendations

To deliver maturity growth, in line with the strategy pillars and the organisational OKRs and fundraising goals, we recommend:

- being **intentional** about which categories to focus on for ‘now’ and which to leave in the backlog
- leaning into successful categories and **maintain** their high scores, using these as **levers** to grow the other scores e.g. potential to develop upskilling in digital marketing as there’s a strong foundation
- prioritising the ‘3. Culture and ways of working’ category to **build digital culture and mindset** and catalyse growth across all categories
- aligning priority growth areas with the **tech strategy** roadmap, ensuring that growth is mutually supported and appropriately sequenced.

| Category | Now | Next | Future |
|--|-----|------|--------|
| 1. Digital content and storytelling | 1 | 3 | 5 |
| 2. Digital analytics and insight | 2 | 3 | 5 |
| 3. Culture and ways of working | 1 | 3 | 5 |
| 4. Digital marketing and optimisation | 2 | 3 | 5 |
| 5. Digital skills, capabilities and leadership | 1 | 3 | 5 |
| 6. User experience and digital journeys | 2 | 2 | 3 |
| 7. Digital innovation and experimentation | 2 | 2 | 4 |
| 8. Data management, tools and technology | 1 | 3 | 5 |

Ingredients for engagement - phase 1

- Digital transformation kick-off
- Digital data analysis
- Senior stakeholder engagement 1:1s
- Digital transformation deep dive workshops
- Digital maturity survey and analysis + goal setting
- User research: content and analysis
- Leadership - digital skills and coaching
- External trends & sector insight
- ELT playback - Strategic review insight



1. Co-production: Driving Outcomes and Shared Ownership

GOAL: move away from "delivered-to" strategies, our approach focused on "built-with" methodologies that establish psychological safety and joint accountability

- **Collaborative "Hopes and Dreams" Workshops:** Surface people's aspirations and anxieties, ensuring the strategy addresses real internal concerns from the start
- **The "Burning Platform" Narrative:** Deep-dive workshops encourage teams to articulate the "why" behind the change, building a collective "opportunity cost" narrative rather than an imposed one
- **Cross-Departmental OKRs:** Clear, "ownable" goals that cut across projects and cultures, ensuring success is a shared metric rather than a departmental one
- **User Research as a Shared Experience:** By inviting internal staff to observe user research sessions first-hand, the project creates a shared understanding of audience needs, which acts as a neutral ground for strategy development

2. Navigating Bureaucracy and Leveraging Ecosystems

GOAL: Excessive bureaucracy is often a result of rigid structures; our approach bypasses it by creating dynamic, cross-functional "ecosystems."

- **Squad Working:** Instead of traditional "working groups" that are often bogged down by hierarchy, the "squad" model uses cross-functional teams focused on specific outcomes. This structure is intentionally designed to be outcomes-focused with less bureaucracy
- **New Organizational Language:** The "Digital Maturity Model" provides a shared vocabulary for transformation, helping diverse teams communicate technical or cultural needs without getting lost in departmental jargon
- **Communities of Practice:** Creating spaces for digital and fundraising colleagues to share and learn together helps sustain collaboration beyond the formal project structure.
- **Aligning the "Umbrella":** By bringing disparate workstreams under one "digital transformation umbrella," the approach prevents the duplication of effort and the creation of competing departmental agendas

3. Identifying and Influencing Senior Stakeholders

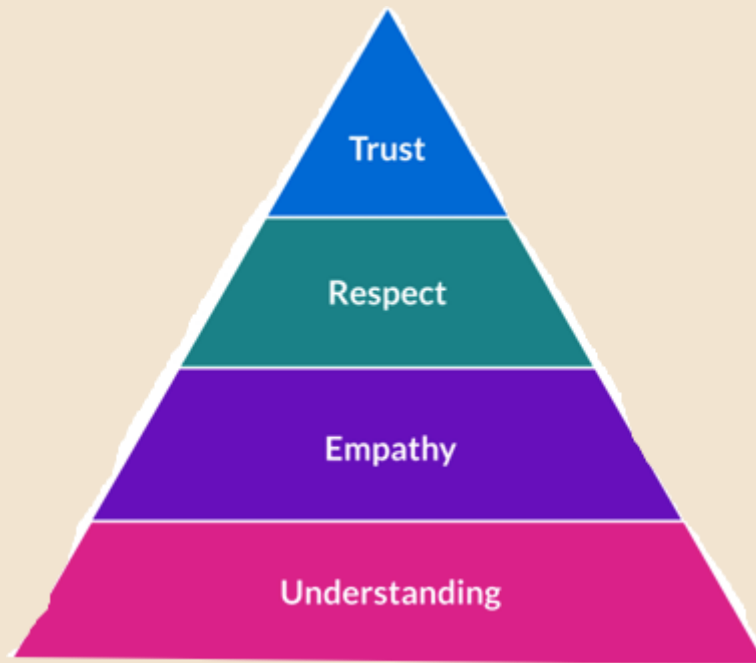
GOAL: Strengthening influence internally, which required a mix of direct coaching and high-visibility evidence

- **Strategic 1:1s:** Conducting 1:1 sessions with stakeholders across the organization ensures their specific perceptions and goals are reflected in the roadmap
- **ELT Playback Milestones:** The "Strategic Review Insight" deck is a formal milestone designed to build executive buy-in by presenting a clear picture of the "burning platform" and the roadmap for progress
- **Executive Coaching:** Senior leadership coaching and Director-level coaching are integrated into the implementation to upskill leaders, ensuring the transformation is sustainable and supported from the top.
- **Strategic Alignment:** OKRs are specifically chosen because they relate closely to high-level organizational goals, making the digital strategy more influential to senior leaders focused on mission-critical targets

4. Collaboration for Successful Communication

GOAL: The approach aims to treat communication not as a final broadcast, but as an ongoing process of building trust and transparency

- **The Trust Pyramid:** The process is designed to move stakeholders through a journey from Understanding to Empathy, then Respect, and finally Trust. This ensures that even when people don't agree with a decision, they trust the process that led to it



4. Collaboration for Successful Communication

GOAL: The approach aims to treat communication not as a final broadcast, but as an ongoing process of building trust and transparency

- **Shared "State of Play":** The output of the initial strategic review is a "shared, clear picture" of the current state, ensuring all communications about the future are grounded in a single version of the truth
- **Psychological Safety:** By prioritizing the development of the right culture, the approach allows the most creative solutions to be suggested "without fear," fostering open and honest communication
- **Inclusive Engagement:** Designing workshops to accommodate different neurodivergent preferences and abilities ensures that communication is equitable and that all voices are genuinely heard



**Phase 2
Regroup**

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STRATEGIC DECISION DIAGNOSIS - CONTEXT

- Strategic transformation choices were intentional to minimise reactive and crisis-driven change + set us up for future activity
- **There had been a complete change in senior leadership between initial buy-in and phase 2**
- The vehicles for these decisions, specifically discussions on trade offs had not explicitly been had at all levels - yet
- This felt like the right time for this review, as we moved into implementation and business planning/OKRs
- This toolkit is designed to help us diagnose our decision making and identify priority gaps to plug

As part of this period - myself and the rest of the leadership team, did this exercise separately, then regrouped to discuss.

Self-Assessment Tool Strategic Decision Diagnostic

About this tool

This has been designed and shared as part of the [Charity Change Collective](#) transformation toolkit **Strategic decisions and leadership**.

Use it to diagnose how well your organisation makes strategic decisions - and where the breakdowns occur.

[Get in touch](#) if you would like help facilitating this workshop or exploring what you might do next.

How to use this diagnostic

Time required: 15-20 minutes

Who should complete it:

- Individual leaders (CEO, directors, transformation leads) for personal reflection
- Leadership teams completing independently then comparing scores (recommended - differences reveal where alignment is lacking)

What to assess: Choose a specific strategic decision to evaluate. This works best with:

- A decision made in the last 12 months (recent enough to remember clearly)
- A decision that required meaningful resource allocation or change
- A decision where you can now see whether implementation succeeded or stalled

Alternatively, use it to assess a decision you're currently making - to identify gaps before you commit.

[Access the resource >](#)

Made by [Charity Change Collective](#) 2025

The strategic decision diagnostic tool

What is it? A self-assessment checklist to diagnose how well your organisation makes strategic decisions and where breakdowns occur.

When might you use it?

- Before a major decision (identify gaps early)
- After a decision has played out (learn what worked)
- When leadership wants to compare perceptions

What you'll get

- Scores across all five tests
- Your critical gaps identified
- Clear direction on which tools to use next

Format: Individual or team | **Time:** 15-20 minutes

Strategic decision exercise - Five Tests

- **The Analysis** reflects diverse voices and sources and is rigorous enough to enable a decision
- **The Choice** to change is made and has uncomfortable implications
- **The Buy-In** to the change is built among all those critical to success
- **The Trajectory** changes in a measurable way as resources shift
- **The Learning** is deliberately embedded and drives more change

The Five Tests at a glance

| | The core question | The big red flag |
|---------------|---|--|
| 1. Analysis | Is the reasoning for change grounded in evidence, expertise, and mission? | "We know the solution already" |
| 2. Choice | Have we made a risky choice with uncomfortable implications? | "Everyone's comfortable with this decision" |
| 3. Buy-In | Do stakeholders genuinely understand why in language they connect with? | "We announced it, now they know" |
| 4. Trajectory | Are resources shifting and creating observable change? | "We'll make it work with existing resources" |
| 5. Learning | Are we treating this as a hypothesis and embedding what works? | "Once this crisis ends, we'll go back to normal" |



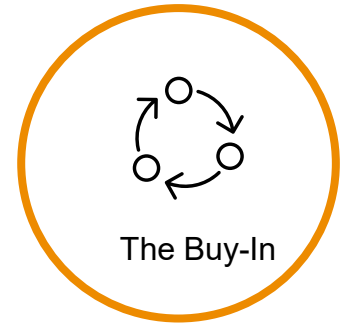
The Analysis

Jeff – 22/25
Avg. of ELT – 21/25



The Choice

Jeff – 17/25
Avg. of ELT – 13/25



The Buy-In

Jeff – 11/25
Avg. of ELT – 12/25



The
Trajectory

Jeff – 17/25
Avg. of ELT – 15/25



The Learning

Jeff – 17/25
Avg. of ELT – 15/25

Strategic decision diagnosis

Our respective scores both fell within the 75-99 range

With our lowest scoring areas both being 'Buy-In'

| Score range | What it suggests |
|-------------|---|
| 100-125 | Strong strategic decision-making capability. Focus on maintaining and sharing good practice. |
| 75-99 | Solid foundation with specific gaps. Identify your lowest-scoring test and prioritise that. |
| 50-74 | Significant gaps across multiple dimensions. Consider external support to build capability. |
| Below 50 | Strategic decisions are likely failing to translate into organisational change. This toolkit can help - start with one test to improve. |

Strategic decision diagnosis

Our respective scores both fell within the 75-99 range

With our lowest scoring areas both being 'Buy-In'


| Lowest test | What it means | Where to focus |
|---------------|---|---|
| Analysis | Decisions made without adequate evidence or expertise | Build analytical capability; access external expertise; connect analysis to theory of change |
| Choice | Decisions deferred or made without real trade-offs | Use Stop/Start/Continue workshop; create urgency; accept discomfort |
| Buy-In | Decisions made but not understood or owned | Invest in persistent communication; translate for different audiences; ensure senior ownership |
| Trajectory | Decisions made but resources don't follow | Align budgets to strategy; protect multi-year commitments; make change visible |
| Learning | No adaptation; reversion to old ways | Build review mechanisms; create safety for pivoting; deliberately embed what works |



From Buy-In to shared ownership

The intent was to shift the notion of 'buy-in' from a passive state (simply being told what is happening) to 'shared ownership' (being part of the delivery)

Digital transformation is not a service provided to the organisation by the Digital team, but a collective shift in how the whole charity operates.



The result

- Broke down territorial budget protection
- Distributed OKRs & KPIs against strategic objectives
- Created genuine shared understanding
- A martech strategy - consolidated tech stack
- Change projects are MOVING!
- Digital maturity - still in progress...



Thank you

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