

# client SUMMIT



Lens 4: Building for the Long Term  
Trust, Adaptability & Continuous Value

# The Reality

Organisations are experiencing:

- More digital investment
- More pressure to deliver
- More complexity to manage

*“Many organisations deliver change — but struggle to sustain progress.”*

Transformation is happening –  
but confidence isn’t improving at the same rate



of organisations report  
**increased cost  
and workload**



report increased pressure  
**to generate more income**  
without proportional  
increases in resource



say technology investment  
**is firmly aligned to a clear  
digital strategy and  
planned investments**



Organisations are investing more in digital –  
**but many are still struggling to sustain progress over time.**

SOURCE: MemberWise Digital Excellence (2026/27) Research Report

# The Core Structural Challenge

Most organisations are structured to fund delivery — not sustain progress

 **Traditional operating model**

-  Project-based budgets
-  Fixed scope, fixed costs
-  Procurement cycles every 3–5 years
-  Success measured at launch (not over time)
-  Different teams with different responsibilities across the organisation
-  Different priorities across departments
-  Delivery separated from optimisation

 **What this often creates**

-  Fragmented progress
-  Long gaps between improvement cycles
-  Reactive decision-making
-  Inconsistent member experiences
-  Rework and duplicated effort
-  Difficulty prioritising what matters most
-  Progress slowing after delivery

 **Members don't experience platforms – they experience outcomes.**

# The Operating Model Gap

## What We See:

Plan > Procure > Delivery > Launch > Pause

## Member or User Needs Evolve

But the organisation isn't structured to evolve with them

“Transformation is not a destination. Change never stops”

Source: Tulip – Digital Transformation is a Bridge to Nowhere

<https://tulip.co/blog/digital-transformation-is-a-bridge-to-nowhere-enter-continuous-transformation/>








# The Membership/NfP Struggle








Membership/NfP organisations face unique structural challenges that make continuous evolution hard – even when the desire is there

## Structural realities:

-  **Annual budgeting cycles**  
Funding decisions locked in long before needs evolve
-  **Funding tied to projects**  
Investment approved for specific initiatives, not ongoing progress
-  **Multiple stakeholders**  
Different departments, priorities and platform owners
-  **Procurement-led thinking**  
Focus on buying solutions, not driving outcomes
-  **Success measured at launch**  
Attention and investment drop once the project goes live

## The impact:

-  **Fragmented progress**  
Improvements happen in silos, not as part of a joined-up plan
-  **Rework and inefficiency**  
Lack of consistency leads to duplication, workarounds and wasted effort
-  **Long gaps between improvement**  
Opportunities are identified but not actioned in time
-  **Inconsistent experience**  
Member experiences vary across platforms and touchpoints
-  **Prioritisation challenges**  
Hard to know what matters most or what will have the biggest impact

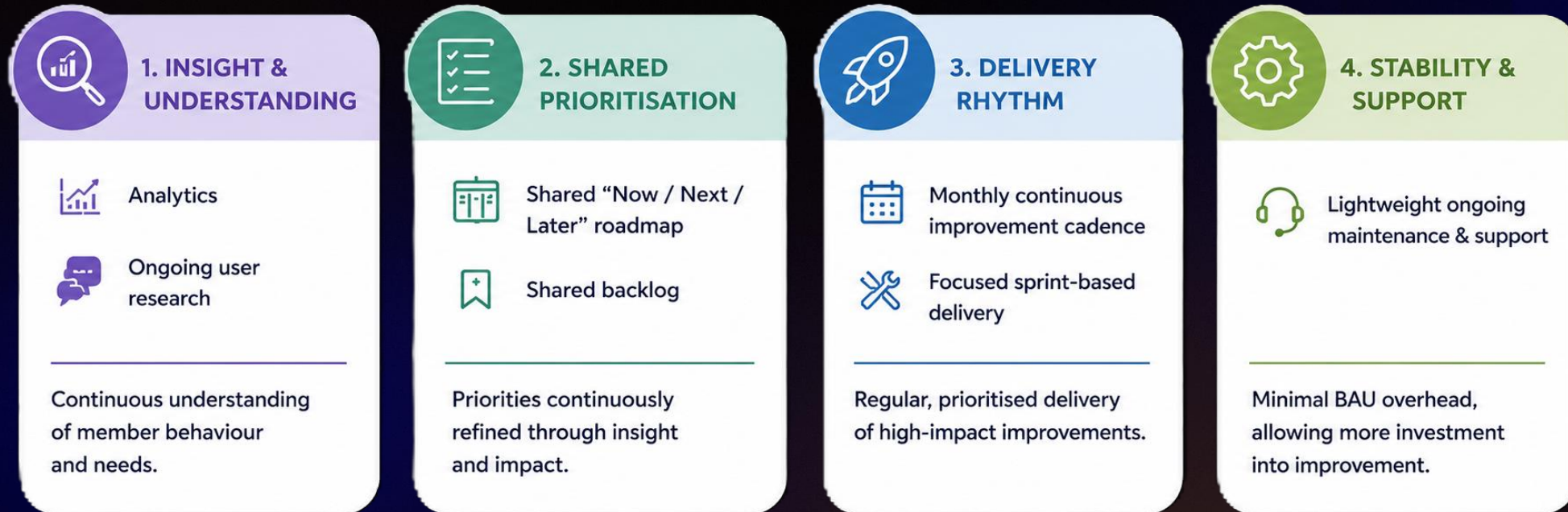
# Optimal Operating Model

Moving to continuous evolution and delivery



# Continuous Improvement

How organisations are restructuring investment to support continuous evolution



Increasingly, organisations are restructuring their existing spend (not additional spend!), shifting from reactive support and periodic projects to **continuous improvement**

# Insight & Understanding



Continuous insight — not periodic discovery

Organisations making sustainable progress are:

- Continuously analysing behaviour
- Identifying friction early
- Validating priorities with real users
- Using insight to inform decisions year-round

Practical examples include:

- Analytics reviews
- User interviews
- Journey analysis
- Behaviour tracking

Insight is growing –  
but action is still lagging behind



61%

of organisations  
measure member  
engagement



43%

deliver  
personalised member  
experiences



Many organisations are becoming  
better at collecting insight –  
but fewer are consistently using  
that insight to drive decisions.

SOURCE: MemberWise Digital Excellence Report 2026

You are a  Chartered member, where would you log your CPD?

Select an option from the menu below

Work

Member benefits

Insights & resources

Business tools & services

CPD

I'd find it here

Regions

Study

Explore

Join us

News and campaigns

What's on

Shop

Login

Build

Recruit

Results 50

## 2. CPD

### Results

You are a  Chartered member, where would you log your CPD?

Nominated correct answer(s)  
CPD

Responses  
50

Success rate  
58%

Directness  
26%

Totals Common paths 7 Individual paths Path diagram

CPD 

58.0% 29

Login

18.0% 9

I'm not sure, pass

8.0% 4

Learning programme

4.0% 2

News and campaigns

2.0% 1

Study

2.0% 1

Other

2.0% 1



Task



This navigation is **Concept A**.

Once the prototype loads, please find the following pages in the menu:

1. Member Resources
2. Courses
3. Mental Wellbeing
4. Guidelines
5. Advocacy and Campaigns

Click 'Continue' when you've found all of the pages.

Instructions

- You can only click on the main menu.
- Click 'Minimise' in the top right corner to hide these instructions.
- Remember to share your thoughts and 'think out loud'.

Continue

# Shared Prioritisation

cantarus

connect

Transparent roadmap — not static annual plan

Organisations making sustainable progress are:

- Continuously refining priorities
- Maintaining visible roadmaps
- Aligning stakeholders around shared outcomes
- Adapting based on changing needs

Practical examples include:

- Now / Next / Later roadmap
- Shared Jira/DevOps backlog
- Quarterly reprioritisation
- Cross-functional governance

**Shared prioritisation drives better outcomes – governance matters more than technology**



Successful transformation depends on **governance**, **culture** and **operating model** — not technology alone.



Clear priorities, aligned governance and shared decision-making create the conditions for sustainable progress.

SOURCE: Cloudmore – Navigating Digital Transformation Projects: Bottom-Up vs Top-Down, Big Bang vs Incremental

 <b>NOW</b> 0 – 3 months	 <b>NEXT</b> 3 – 9 months	 <b>LATER</b> 9+ months
 <b>Improve login experience</b> Simplify login and strengthen security. <span>IN PROGRESS</span>	 <b>Personalised member experience</b> Deliver tailored content and recommendations. <span>PLANNED</span>	 <b>AI-powered support</b> Introduce AI to enhance self-service and support. <span>FUTURE</span>
 <b>Member dashboard quick wins</b> Improve key information visibility and layout. <span>IN PROGRESS</span>	 <b>Workflow automation</b> Automate manual processes to save time and reduce errors. <span>PLANNED</span>	 <b>Community hub</b> Create a central hub for members to connect and collaborate. <span>FUTURE</span>
 <b>Streamline application process</b> Reduce steps and improve form experience. <span>✓ DONE</span>	 <b>Enhanced reporting and insights</b> Provide richer insights for members and staff. <span>PLANNED</span>	 <b>Learning and resources hub</b> Provide targeted learning and resources for members. <span>FUTURE</span>
 <b>Mobile responsiveness improvements</b> Enhance experience across key member journeys. <span>IN PROGRESS</span>	 <b>Online payments improvements</b> Expand payment options and improve UX. <span>PLANNED</span>	 <b>Advanced security and privacy</b> Invest in proactive security and privacy enhancements. <span>FUTURE</span>
 <b>Communications preferences</b> Allow members to manage their communication preferences. <span>UP NEXT</span>	 <b>System integrations</b> Improve integrations with key internal systems. <span>DISCOVERY</span>	 <b>Innovation lab</b> Explore new ideas and emerging technologies. <span>FUTURE</span>
 <b>Focus: Impact now</b> Deliver high-impact improvements that members feel.	 <b>Focus: Build momentum</b> Build on early wins and deliver meaningful enhancements.	 <b>Focus: Future-ready</b> Invest in innovation and long-term member value.

# Delivery Rhythm

Continuous delivery — not periodic transformation

## The focus shifts:

- Large launches > Incremental improvement
- Long delivery cycles > Regular releases
- Delayed value > Continuous momentum

## Practical examples include:

- Monthly improvement cadence
- Dedicated sprint weeks each month
- Smaller high-impact releases

## Sustainable progress comes from many small improvements – not a single big bang



“

Sustainable progress often comes from the **aggregation of marginal gains** rather than a single transformational event.

—  
Mark Marshall

*Big Bang Approaches to Digital Transformation: Do They Work?*



Our monthly sprint approach is designed to deliver **continuous, incremental value** – building momentum, learning quickly and adapting as we go.

SOURCE: Mark Marshall – Big Bang Approaches to Digital Transformation: Do They Work?

EXAMPLE MONTHLY CADENCE



EXAMPLE PRIORTISED BACKLOG

	NOW 0-3 months	NEXT 3-6 months	LATER 6+ months
	<b>Improve member login journey</b> Reduce friction for returning members and increase successful logins.		<b>HIGH IMPACT</b> UX
	<b>Simplify event registration flow</b> Reduce drop-off and improve completion rate.		<b>HIGH IMPACT</b> JOURNEY
	<b>Improve dashboard visibility</b> Surface relevant actions and insights for members.		<b>MEDIUM IMPACT</b> FEATURE
	<b>Refine onboarding emails</b> Improve clarity and engagement in the first 30 days.		<b>MEDIUM IMPACT</b> CONTENT
	<b>Enhance payment experience</b> Add more payment options and improve error handling.		<b>LOWER IMPACT</b> TECH
	<b>Strengthen security controls</b> Implement additional security enhancements.		<b>LOWER IMPACT</b> TECH

# Stability & Support

Stability should enable improvement — not consume investment

## Mature organisations increasingly:

- Reduce reactive support overhead
- Improve platform stability
- Automate maintenance where possible
- Reserve more capacity for improvement activity

## Practical examples include:

- Lightweight retainer support for monitoring & maintenance
- Channel remaining budget to reserved sprint capacity and shared improvement roadmap

## Automation adoption is accelerating – reducing manual overhead and increasing capacity



More organisations are automating operational activities and reducing manual overhead – **creating more capacity to focus on delivering value** for members.

- ✓ Reduced manual work
- ✓ Increased efficiency
- ✓ More time for value-adding work
- ✓ Better support for members

SOURCE: MemberWise Digital Excellence Report 2026

# Technology as the Enabler



Platforms, CRM and digital systems form the foundation – but value is created through how they are governed, connected and evolved.



Connected technology foundation

## Technology should provide:

- Stability *not* Complexity
- Flexibility *not* Dependency
- Scalability *not* Fragmentation
- Connection *not* Constraints

“Technology rarely limits progress. Operating models do”

Source: Navigating Digital Transformation Projects: Bottom-Up vs Top-Down, Big Bang vs Incremental

<https://cloudmore.com/content-hub/navigating-digital-transformation-projects-bottom-up-vs.-top-down-big-bang-vs.-incremental>

# Building Trust

Members don't experience projects or platforms, they experience how consistently value is delivered over time

TRANSPARENCY	MEASURABLE OUTCOMES	VISIBLE PRIORITISATION	ACCOUNTABILITY	CONTINUOUS OPTIMISATION
<ul style="list-style-type: none"><li>Clear visibility of priorities</li><li>Open reporting of progress</li></ul>	<ul style="list-style-type: none"><li>Focusing on value and impact</li><li>Outcomes that matter to members and the organisation</li></ul>	<ul style="list-style-type: none"><li>Shared view of what we're working on</li><li>Understanding why, and what's next</li></ul>	<ul style="list-style-type: none"><li>Owning outcomes and commitments</li><li>Learning and adjusting as we go</li></ul>	<ul style="list-style-type: none"><li>Using insight and feedback</li><li>Making ongoing improvements that compound over time</li></ul>
Clear visibility of priorities, progress and decisions.	Focusing on outcomes that matter to members and the organisation.	A shared view of what we're working on, why, and what's next.	Owning outcomes, learning continuously and adjusting as we go.	Using insight and feedback to make ongoing improvements that compound over time.

**Not through:**

- Launches and go-live moments
- One-off transformation initiatives
- Short-term delivery milestones
- Momentary wins that don't sustain change

“Consistency is one of the strongest drivers of customer loyalty and trust.”

Source: PwC Future of Customer Experience  
<https://www.pwc.com/gx/en/services/consumer-markets/consumer-insights-survey.html>



# Takeaways

1. Are we structured to evolve — or just deliver projects?
2. Do we have a group accountable to members which has to report to the outside world?
3. Are priorities continuously visible?
4. What happens after launch?
5. What would change if success was measured over time?



Follow-up questions?  
Catch me at the bar!

Or reach out to me here:

[mike.cundall@cantarus.com](mailto:mike.cundall@cantarus.com)

+44 (0)7766 734 849

<https://www.linkedin.com/in/mikecundall/>

# Dive Deeper

Scan the QR code for exclusive download access to this presentation, plus useful bonus learning content.

