PARSONS | TKO

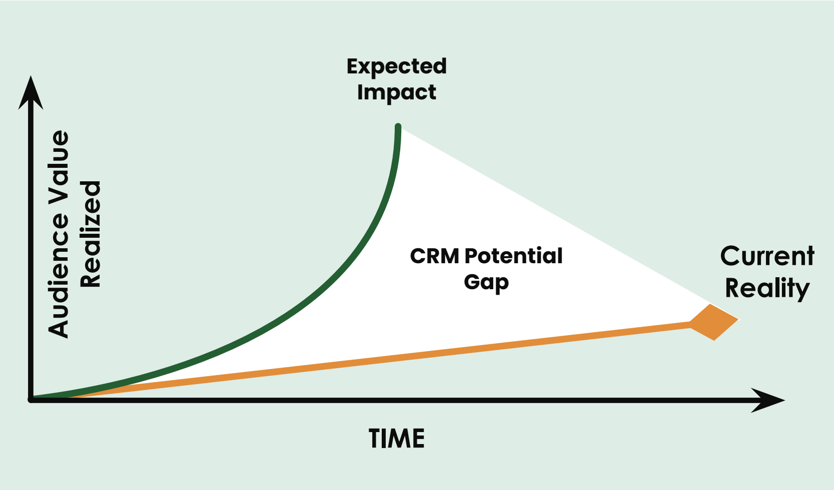
Audience Engagement Model

The secret sauce for high quality engagement

A ParsonsTKO Engagement Architecture Primer

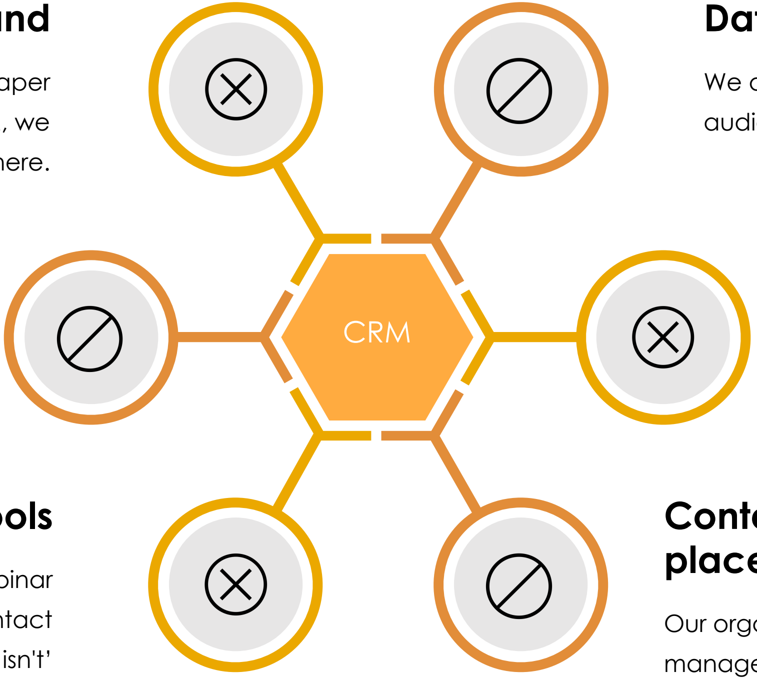
Any of this sound familiar?

- "We don't update the data in the CRM, and the picture there feels incomplete…"
- "We can't use our CRM to be our single source of information about our relationships with people outside the organisation."
- "Different parts of our organization use different databases to store their contact info or engagement data."
- "We have some really good tools, but they don't talk to each other usefully.'"
- "It takes us a really long time, using excel and manual analysis to figure out things like which people came to an event the year before, but didn't come this year."



Many organizations invest in a CRM, but then don't get the expected return on investment they were banking on

I thought CRM’s fixed all this?



Analysis still done by hand

Our business process involves a lot of paper checklists & excel files outside the CRM, we can’t run useful reports in there.

Data isn’t trusted

We don't trust the data we have about our audiences

Data fragmentation

Data is spread out in different systems and time consuming to report on and the integration requirements aren’t well documented.

Hard to compare data

We aren't capturing the right data in the right formats, so it’s not clear what the apples vs the oranges are.

We use specialized tools

We have an events management/webinar platform that has solid reporting around contact event attendance and interest, but it isn't’ connected in a way that makes insights and reporting easy

Contacts are managed too many places

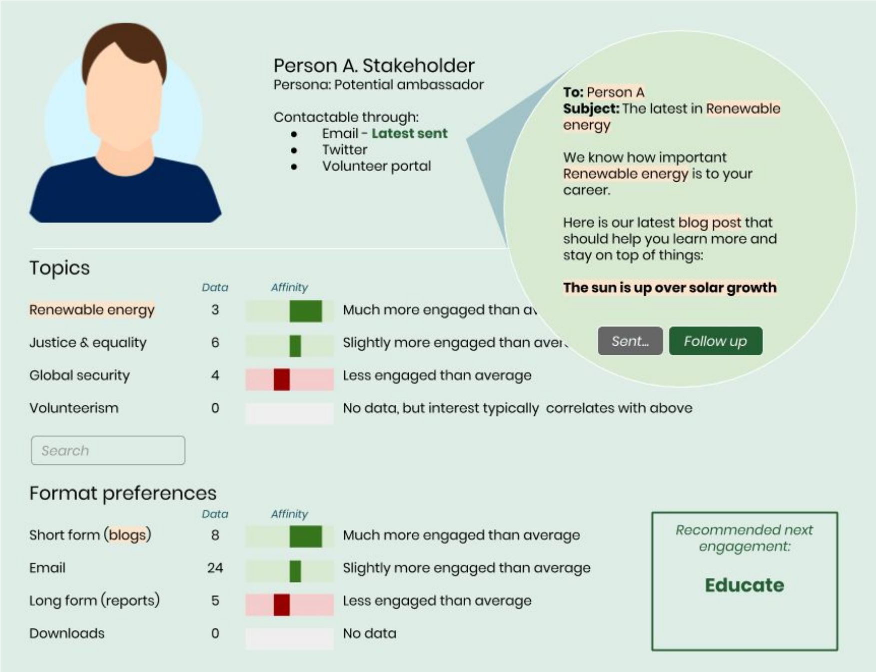
Our organization has a separate high value donor management system and a grants management platform each managing different kinds of relationships

Turns out the simple fix isn't technology

It's creating a **contact model** to organize & visualize your audience & contact data that **highlights the business value** of each contact.

The dirty little secret is that you aren't being held back by the functional limitations of your CRM, but because you don't have **a personalized organization specific data model**.

A functional contact model will **suggest action and educate you about the needs and motivations** of each contact, and make reporting possible and useful.



A functional contact model:

A single source of truth

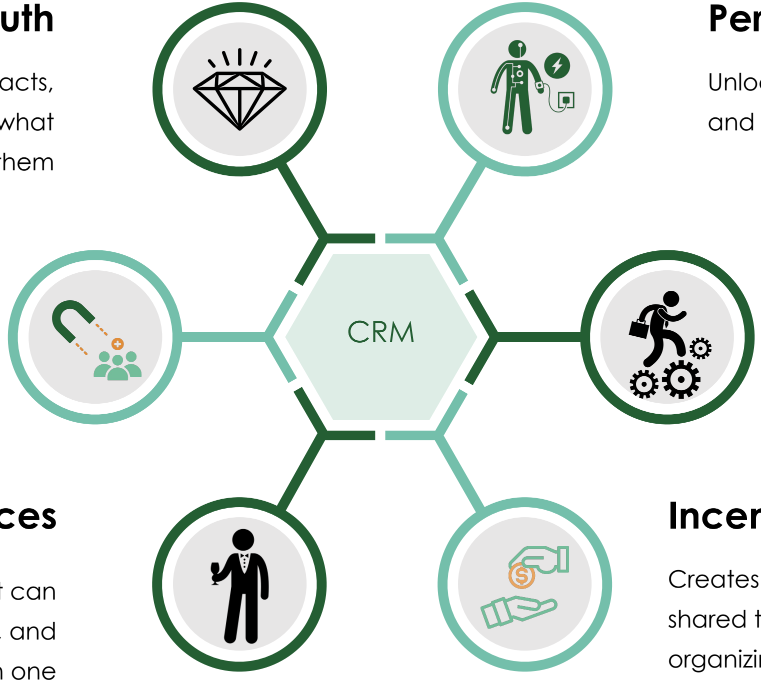
Is a single useful source of truth for contacts, how you engage with them, and what relationships you have with them

Segmentation

Allows simple and effective segmentation & targeting of your audiences

White glove experiences

Provides high context contact profiles that can be used by gift officers, grant seekers, and executives to prepare for valuable one on one interactions with key stakeholders.



Personalization & Automation

Unlocks access to high quality personalization and automation capabilities.

Staff Time

Reduces your time spent preparing, executing, and evaluating outreach campaigns & goals

Incentives to improve data

Creates internal incentives to steward and manage a shared taxonomy of interests, categorizes, and organizing principles across all your outreach platforms

How we get there

01 Engagement Touchpoints Workshop

An ideal view of a contact with everything valuable to see in a compelling visual layout, built from your inventory of interactions data

02 Relationship nurturing

A map of relationships and interests you want to nurture or know about, between you and your contacts and your contacts and the wider world

03 Engagement pipeline, activities, and alerts

Collaborative design of your audience engagement pipeline stages and the necessary tasks & alerts to support these

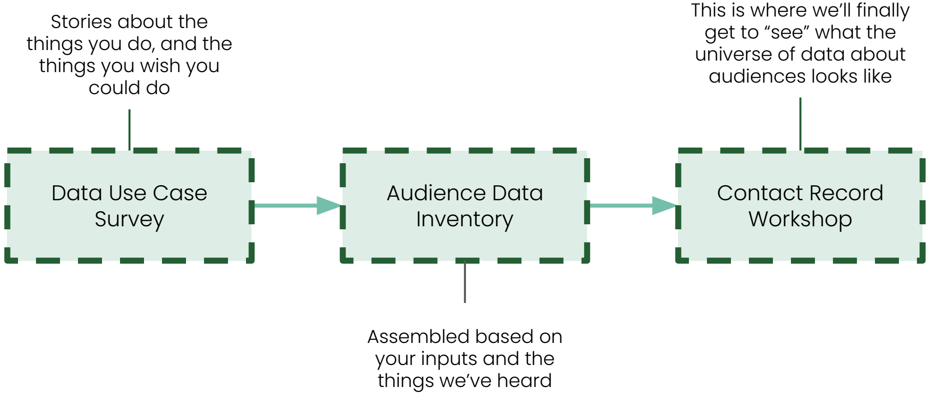
04 CRM configuration (Optional)

Your CRM can now be configured to support your exact needs, business processes, and audience engagement steps, finally realizing its full potential

01 - Engagement touchpoints workshop

We'll start out by conducting a data use case survey to get a broad high level understanding of how you both currently and wish you could engage with your contacts. We'll build a rough draft of an audience data inventory off the inputs you've provided.

In the workshop we'll facilitate the design of an ideal contact record based off your audience data and use cases, and use this time to fill in any gaps and kick the tires on any assumptions we've made about your engagement.



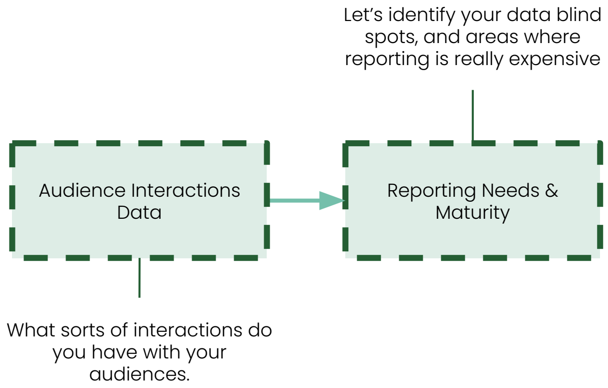
A **mental model**
outlining the **key information**
you need to know about your **specific contacts**
to power **meaningful engagement**

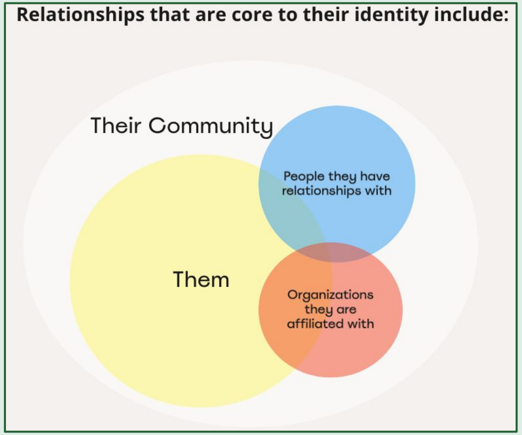
1. **Who they are** (Identity)
   - Name
   - Email
   - Organization
   - Role
2. **What they care about** (Interests)
   - Topics
   - Regions
   - Content preferences
   - Communication needs
3. **What they've done** (Activity)
   - Signed up for an event
   - Met with staff
   - Donated
   - Signed a petition

02 - Relationship nurturing workshop

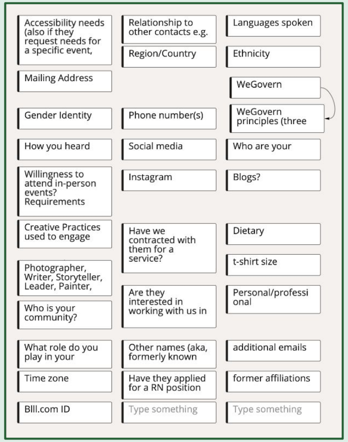
Now that we've explored your ideal contact record, we'll dive into the nitty gritty of what data informs those contact records. In this workshop we'll explore your audiences, their relationships to you and to each other, and all the various sorts of interactions you have with your audiences. These can range from if you have contacted them about a particular service or topic, how you choose creative materials to send to them, to demographics like their t-shirt size.

We'll then work with you to identify where you aren't tracking data well enough, where reporting on that data is really labor or cost expensive, and what blind spots this creates for your organization.

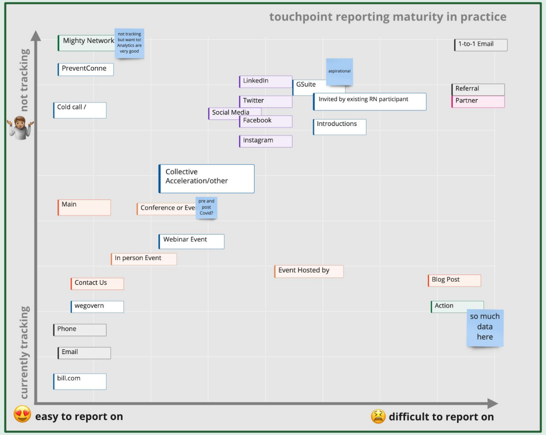




The value of the CRM isn't just as a database of addresses & phone numbers, but in how well it tracks relationships & interests



In this workshop we create an inventory of all the different relationships & interests that are important for your audiences

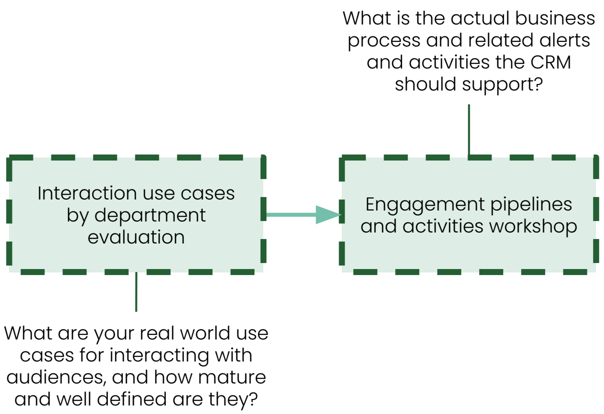


Then we'll help you assess your current difficulty in tracking & reporting on those relationships

03 - Engagement pipeline, alerting, and activities design workshop

With a good understanding of your needs, and what data and reporting would be valuable, we can start to design the specific configurations that will produce business value for you in your CRM. These include reducing staff time by replacing by hand processes with CRM guided pipelines, useful alerts and stage reporting to keep the process efficient, and creating places to capture the right data to make reporting and data integrity better.

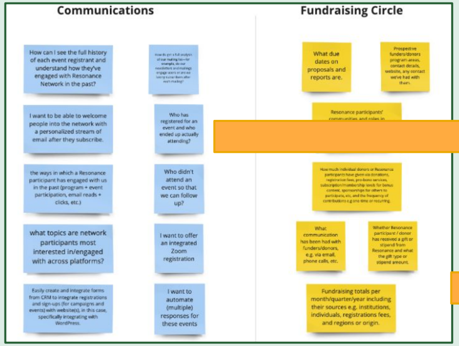
At the end of this process you'll have visual models of your key audience engagement pipelines, with activities and deliverables defined for each stage, as well as any necessary steps to "progress" an audience member from one stage to the next.



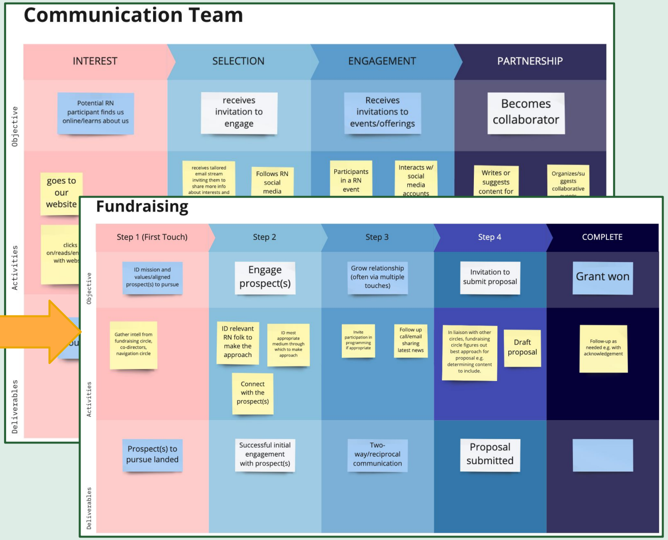
Finding and **engaging** contacts crosses systems and silos

"**Alert me** when
a donor who is also a **prospect**
makes a gift
in **their region**

so that I can **notify a network member in that region**
so they can **send a personal email"**



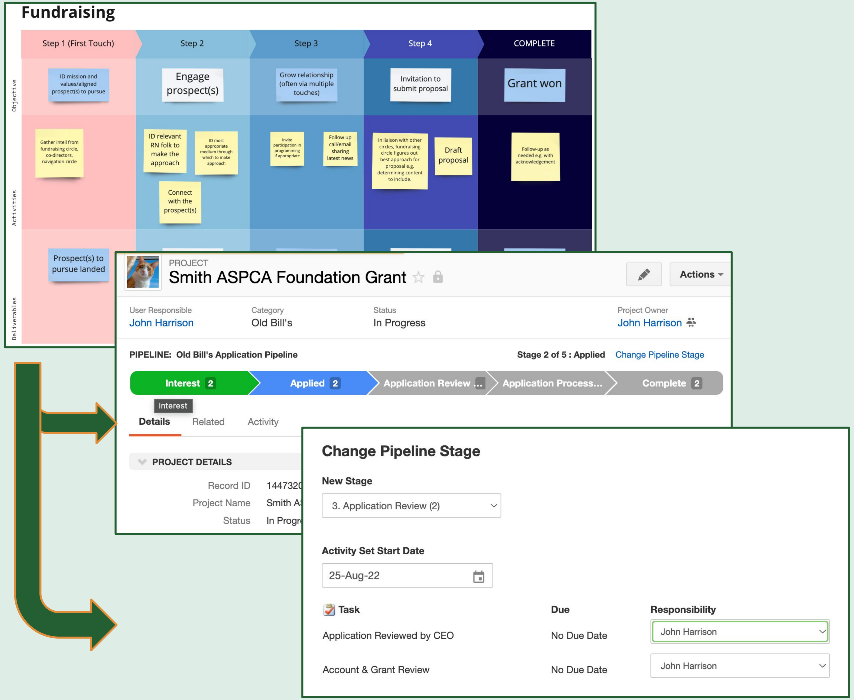
We'll help you detail out each key process into a clear pipeline of stages & activities



04 CRM configuration (Optional activity)

We work with numerous organizations operating complex technical ecosystems to power their audience outreach. One thing they all struggle to do is to configure and tailor their outreach systems to produce the productivity gains promised on the box when they bought those systems. Our process is designed to find, document, and organize everything you need to do this. (Illustrated to the right)

However to maximize the value of your CRM, you need to not just configure it, but also connect third party data sources, transform and import data, build reports, and setup alerts. **The most important step however is our speciality, stewarding adoption and change management efforts** that ensure you don't just have a new contact model, but a new and more efficient way of working.

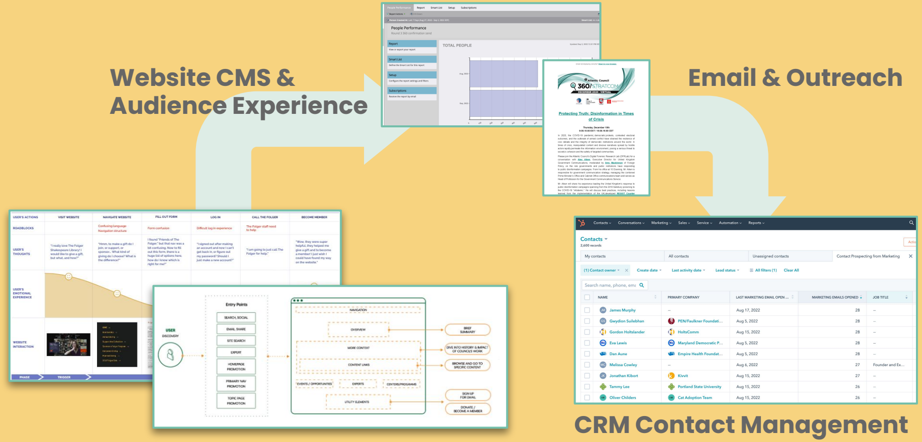


Our design process can flow directly into pipeline, task, and alerting configuration within your CRM. (Example: Pipelines configured in Insightly CRM)

Enterprise Taxonomy (Optional Activity)

Standardize the data coming into your CRM from third party systems by creating unified structures, naming conventions, better labels across your engagement platform. This ensures that clear picklists and self explanatory labels are uniformly applied to the data generated from your email, website CMS, volunteer, and donation platforms. This results in higher quality reporting, and unlocks powerful engagement metrics in your CRM.

As an add on to designing your contact model, you'll receive an enterprise taxonomy design workshop, where together we design and plan out the deployment of this powerful asset.



Taxonomy powers great integrations

An **organization-wide taxonomy** is essential for useful integration of your engagement platform (CRM, Email, Analytics, Social, Web) as it ensures data is comparable and connectable.

Meet the author

Nate Parsons is the Chief Strategy Officer of ParsonsTKO and leads the company's consulting strategy practice. He lives in Silicon Valley, blending the area's penchant for innovation in technology with more than 20 years of experience supporting digital projects in the non-profit, Government, NGO, and commercial community.

His experience includes technical consulting for the AP, UN OCHA, Ann Taylor, The Atlantic Council, and Brookings, as well as numerous leadership positions at Mindshare, Phase2, Oracle previous to ParsonsTKO.

I think you all really helped a number of us see the potential of integrating our data collection and normalization across platforms. I think you can give yourself credit for seeing the big picture in a way nobody did.

Soren Messner-Zidell, Creative Director

Brookings

Who we’ve worked with

PTKO works with mission-driven organizations large and small, including policy and advocacy organizations, think tanks, foundations, research institutions, membership organizations, professional associations, and cultural and educational institutions.

The Trust for Public Land
Atlantic Council
New America
Brookings
The Concord Coalition
Center for Global Development
Washington Center for Equitable Growth
Stanford Medicine
Center for American Progress
MacArthur Foundation
Advancement Project
NWHM National Women's History Museum
United Nations Foundation
GG SC Greater Good Science Center
NRECA America's Electric Cooperatives
JDRF
The George Washington University Washington, DC
Save the Children
ULI Urban Land Institute
No Kid Hungry
American Chemistry Council
Folger Shakespeare Library
WWF
American Cancer Society
Stanford Social Innovation Review
The Education Trust
Energy for Growth Hub
PBS
AMGA
Accion
The Conference Board
Wilson Center
ACS American Constitution Society
National Academy of Sciences

About ParsonsTKO

PARSONS | TKO

- Expertise in **audience engagement strategy**, business process, governance, **change management**, data strategy, and technical architecture
- Clients in **every timezone** of the lower 48, ranging in size from as little as 10 to over 2,000 staff
- Our strategists have **consulted on over 250 million dollars** in project work over their careers
- Exclusively focused on helping **mission driven businesses and organizations**.

Collaboration, trust, and diversity of ideas are the foundational values that have guided our company in helping mission-driven organizations like yours. We believe these values, applied internally for our team as well as with our clients, will always result in right-fit solutions.

Our team is dedicated to helping you **get the most out of your investments in outreach and technology** by providing process improvements, consultation, and data analysis that amplifies what technology can do on its own.

We excel at working with complex multi-stakeholder organizations in the throes of digital transformation, where project success often hinges on coordinating with multiple stakeholders vying for different approaches.

You'll be working with a team that has decades of combined **experience working in consulting firms, digital agencies, and in-house at large nonprofits.** We are strategists, technical architects, engineers, data analysts, and project managers who bring multi-disciplinary backgrounds that span the breadth of planning and implementation for websites and other MarTech platforms. We've been here before, and we know what it takes to reduce risk, maintain focus, break down silos, and deliver.

Want to explore working together?

Schedule a meeting with Nate Parsons

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