

PARSONS | TKO

Welcome

- All participants' microphones have been muted & cameras have been turned off
- Please post any questions in the chat & we will review them during our Q&A segment
- This webinar is being recorded & will be distributed after the session

Who is speaking?



Adam Good

Senior Strategist at ParsonsTKO

PARSONS | TKO



The importance of a contact model



(why you need one and how to create it)

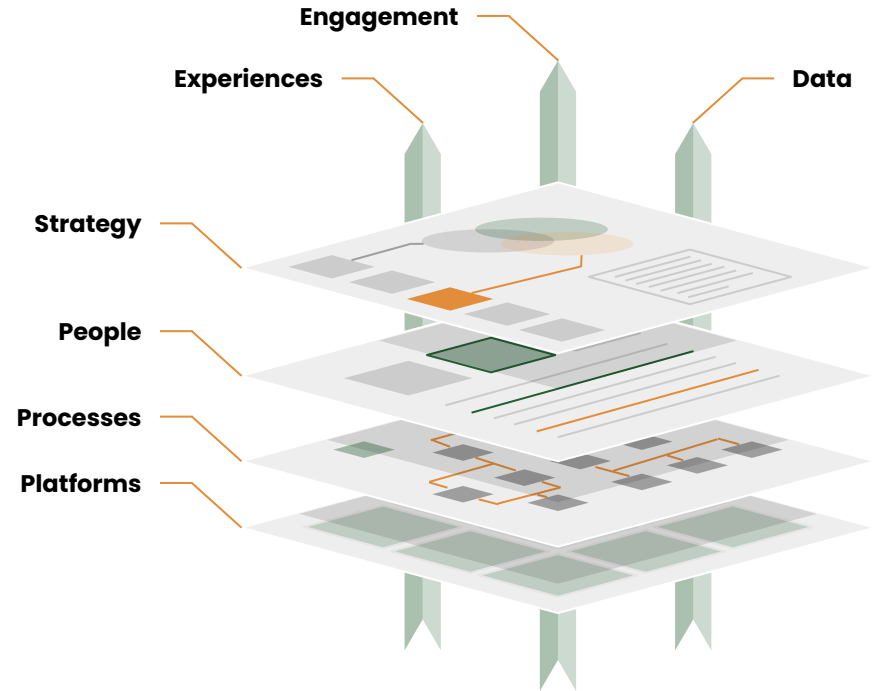
February 10, 2021



The way we see possibilities

Engagement Architecture ♦ noun

The ParsonsTKO philosophy and methodology that addresses your outreach platform as a holistic ecosystem—an interconnected set of people and systems that work together to advance your mission.



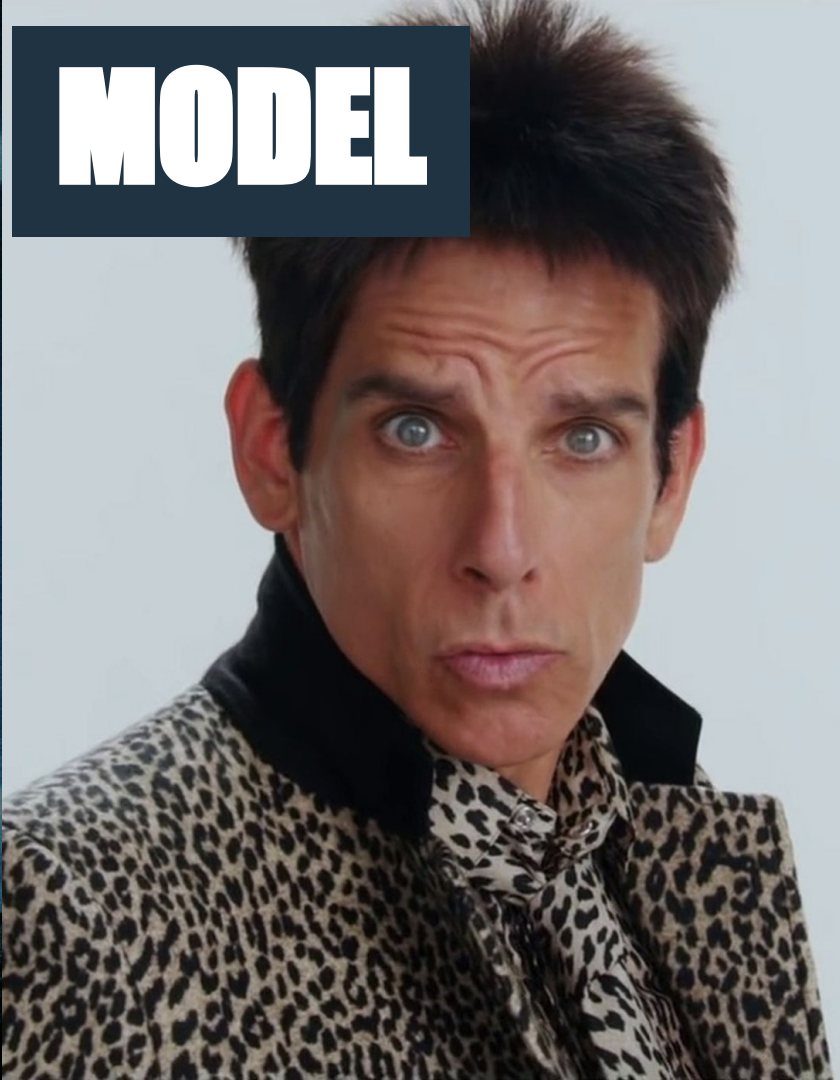
Contact model?



CONTACT



MODEL



Contact Model

A **mental model**

outlining the **key information**

you need to know about your **specific contacts**

to power **meaningful engagement**

...BUT WHY

CONTACT

MODELS?

You need to **know who you're dealing with**

1

Who they are

2

What they care about

3

What they've done

You need to **know who you're dealing with**

1

Who they are

Name

Email

Organization

Role

2

What they care about

3

What they've done

You need to **know who you're dealing with**

1

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What they care about

Topics

Regions

Content preferences

Communication
needs

3

What they've done

You need to **know who you're dealing with**

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Content preferences

Communication
needs

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What they've done

Signed up for an
event

Met with staff

Donated

Signed a petition

...BUT WHY

CONTACT

MODELS?

So you can **find** and **engage** them

(throughout your evolving relationship)

“**Alert me** when

a new contact from the **State Department**

registers for an event

on **national security**

so that I can **notify the national security program lead**

so they can **send a personal email**”

...BUT WHY

CONTACT

MODELS?

Your current model is busted

(or ad hoc, scattered, distributed, non-existent)

- Email system(s!)
- CRM(s!)
- Donor database(s!)
- Those personas you created three years ago
- A team member's brain
- Spreadsheets!

Where do I start?



...BUT HOW

CONTACT

MODELS?

List the **attributes** of your contacts

1

Who they are

2

What they care about

3

What they've done

(Don't forget your taxonomies)

Taxonomies are...

- Categories
- Groups
- Labels
- Tags
- Metadata
- Segments
- Context
- Lists
- ?



Taxonomies are often **hidden in plain sight**.
Think about the ways you use or categorize...

Website IA, **menus**, or navigation

Hashtags on social media

Emails into **folders**

Your **contacts** into related groups, lists, segments

Project names across teams

Marketing **campaigns**

Titles or categories of **internal reports**

(Some starters)

1

Who they are

Name

Email

Organization

Role

2

What they care about

Topics

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needs

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What they've done

Signed up for an
event

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Create **contact use cases**

I want to find _____

So that I can _____



- Organization
- Issues
- Region
- Role
- Donated
- Advocated



- Email
- Arrange a meeting
- Start a campaign
- Identify retention risks
- Conduct an analysis

Add / highlight attributes from use cases

1

Who they are

tk

2

What they care about

tk

3

What they've done

tk

Using the contact model

Implement & operationalize

- Determine where contact attributes are stored (if anywhere(s)!)
 - Identify (and close) gaps in attribute storage or collection
- Create technical requirements for meeting your use cases
 - Implement the use cases currently enabled by your platforms
 - If there are significant obstacles to meeting your use cases, explore technical enhancements and/or replacements
- Show off the contact model and celebrate what it enables

Have specific questions for Adam?

Send Andrea (Admin) a zoom chat to join

Adam's Q&A breakout room for a post
event discussion.

Any questions?



Would you like to continue the conversation?

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Join our community:

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How did we do?

Please let us know by filling out our [survey](#).