

PARSONS | TKO

Migrating to a new platform:

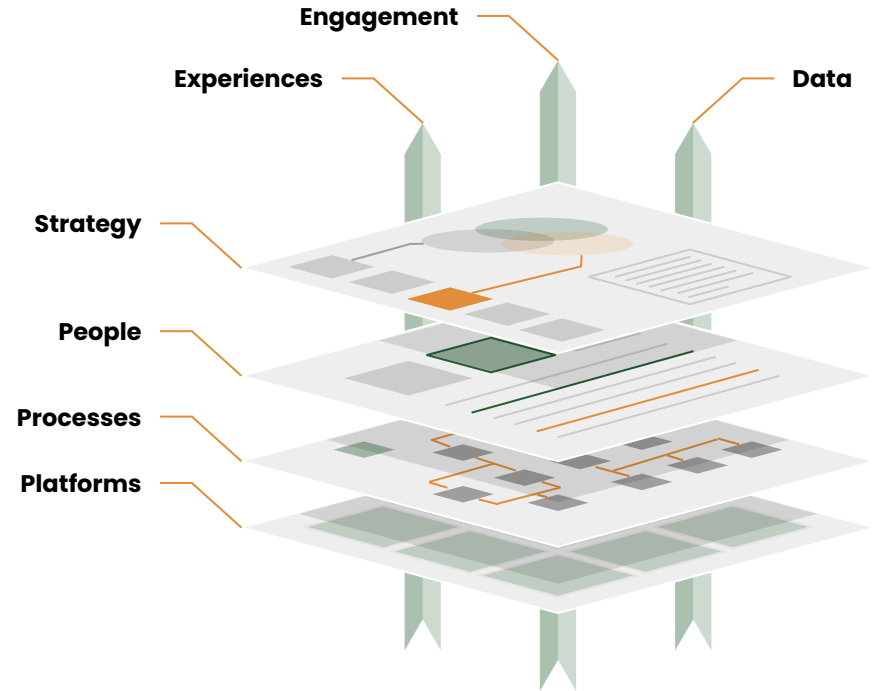
How to leverage hidden opportunities

July 14, 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.





DON'T PANIC

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Panic don't panic

Panic / Don't Panic

Panic!

1. **You need more time** than you think / you don't have as much time as you think
2. There are a **lot** of details you will need to figure out
3. You're going to be **disrupting** skill sets, processes and patterns, and people's work

Don't Panic!

1. You are going to be **helping people**
2. You'll be **improving your organization**
3. This is a time to take stock of your situation and **jettison some baggage**

Migration scope and scale

Will your migration be **seamless**, or **transformational**?

- You have a choice
- Influenced by your time, budget, staff, etc.
- The tool may be transformational
 - but it's also how you and your staff use it

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Opportunity knocks: Platform as potential

The hidden opportunities

1. Create **momentum**
2. Empower **people**
3. Improve your **process**
4. Refine your **strategy**
5. Define your **contacts**
6. Understand **scope**

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Opportunity 1: Create momentum

Create good momentum

- Create a shared sense of purpose
- Look to the good to achieve your goals
- Get over system inertia
- Acknowledge change fatigue
- Overcome past investment anxieties
- Get outside of your comfort zone
- Start productively
- Create a new, sustained cadence

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Opportunity 2: Empower people

Identify your team

- Project owner
- Product owner
- Business owner
- Expert users
- Non-expert users

Involve your team

- **Strategy:** How should the platform advance the org's capabilities?
- **Visioning:** What do they hope the platform can accomplish?
- **Discovery:** What's working and not working about the current platform?
- **Research:** What options are out there?
- **Requirements:** What does the platform need to do and provide to meet objectives and **be usable** to the people who have to use and maintain it?
- **Demos:** How does the platform actually work, and more importantly *feel*?

Who's impacted?

Platforms influence your processes, people, and strategies. How can you get ahead of these potential impacts before they arise?

- Who will be affected by this outside of your organization?
- How will your audience be impacted by this change?
- What needs to be communicated to them before, during and after the change?

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Opportunity 3: Improve your process

Process house cleaning

- What is the state of organizational processes around the use of the platform?
- How are these learned and replicated? What sustains them?
- Are those processes:
 - Non-existent?
 - Outdated?
 - Ad hoc
 - Poorly understood?
- Does anyone own the process and its documentation?

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Opportunity 4: Refine your strategy

What's the point?

What is the purpose of the platform to begin with?

- What does it even **do** and why?
- What business needs does it solve?
- What does it do well, and what does it do poorly?

Assess your vision

- Have you recently updated or created a new engagement strategy or marketing strategy?
- Where are you in the strategy review cycle?
- Where are there strategic overlaps with other groups in your organization?

Assess your needs

What *are* your needs?

- 1. People**
They need a tool to accomplish (or automate!) tasks
- 2. Processes**
Ease of use/training
- 3. Platforms**
Open architecture to link your data ecosystem
- 4. Data**
Supporting analysis, iteration, and progress
- 5. Strategies**
Will this tool get you there?
- 6. Experiences**
What are your users interacting with? What are they feeling?
- 7. Engagement**
What do you want your users to do? Do you have an environment set up to help them achieve this?

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Opportunity 5: Define your audience

Who are you engaging?

- Who are the audiences/contacts who will be captured in this system?
- Are they well modelled?
- This is a great time to create (or revise/refine) your **Contact Model**
- Ensure you set up necessary tracking and analytics to capture what you need to know about them

Granular contact modelling

1

Who they are

Name

Email

Organization

Role

2

What they care about

Topics

Regions

Content preferences

Communication
needs

3

What they've done

Signed up for an
event

Met with staff

Donated

Signed a petition

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Opportunity 6: Understand scope

Understanding scope of platform

Your platform is **more than just a tool** that your staff uses, whether its for asset management, email fundraising, or something else!

- What kind of platform is it?
- What is the scale?
- How much have you customized, or how much is out of the box?
- What can be migrated over directly, what will need to be re-configured?

Understanding scope of process

Do the current that current processes meet your needs? If not, plan out the **improvements** needed to get you there.


- How many people use the platform?
- Are they skilled, or do they need training?
- Will you need new staffing as a result?
- What training will you need to get them there?
- How good is your current governance and documentation?

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**Remember the
opportunities**

The hidden opportunities

1. Create **momentum**
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4. Refine your **strategy**
5. Define your **contacts**
6. Understand **scope**

A dolphin is captured mid-leap, arching over the water. The scene is set against a dramatic sunset sky with a bright sun low on the horizon, creating a golden glow. The dolphin's body is dark against the lighter sky, and a large splash of water is visible behind its tail. The overall mood is serene and celebratory.

So Long, and Thanks
for All the Fish!



Any questions?

**Would you like to continue
the conversation?**

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