



**Envisioning Excellence for  
Mission Driven Success**

# Configuring your CRM to Enable Accessible Outreach and Engagement

Breakout 2E | Salon C-2, LL | CRM Change

PARSONS | TKO



aasp  
**2023**  
SUMMIT  
SEPT. 27-29  
Chicago, IL



**Jamie Mueller**

---

Chief Growth Officer,  
ParsonsTKO



**Nate Parsons**

---

Chief Strategy Officer,  
ParsonsTKO



**Jeremy Roethel**

---

Senior Director of  
Advancement Systems, Data  
& Analytics, Rochester  
Institute of Technology

# Connections & Empathy

Configuring, CRM, Outreach,  
Engagement... All buzz &  
jargon right?

Hiding behind those words is  
the most important thing...

**Empathy.**



Step free Route



**What do you notice about the room?**



# What do you remember about your friends?



## Accessibility and your CRM

# Capacity to care



# Accessibility Campaigns

---

**Example Goal:** Understand which of our readers have a hard time consuming our email, and for what reasons.

## **Possible Metrics:**

- % of respondents who had trouble in area X (Font size, red/green color blindness, color contrast, screen reader issues, etc)
- % of audience responding with issues of any sort

## **Example Follow ups:**

- Share with specific individuals prototype solutions
- Share with the entire list what you've learned both initially and in prototypes.
- Ask out satisfaction with new email designs & approach.
- Provide a place for readers to share their (enhanced) preferences for email.



# Where to start improving relationships?



# Doesn't my CRM already do this?

---

## Most CRMs don't:

- Come pre-configured to track accessibility preferences
- Have contact reports or “tear sheets” designed to promote accessible and inclusive interactions
- Come configured to alert you when key preferences are detected in a new list/segment.

## Most let you create:

- Your own custom fields
- Segments of lists based on filters using your custom fields
- Custom reports (and some custom contact record views)
- Campaign & activity tracking reports

# Customizing your CRM to reflect the ways you interact with your supporters

---

## Video Chat

- Preferred technology for video calls, perhaps one that provides transcriptions, or works great with their personal accessibility hardware?
- Do they like getting a transcript sent to them after the call?

## One on one

- What sort of venue do they prefer? (quiet, wheelchair accessible, etc.)
- Are there times of day that are better?

## Email

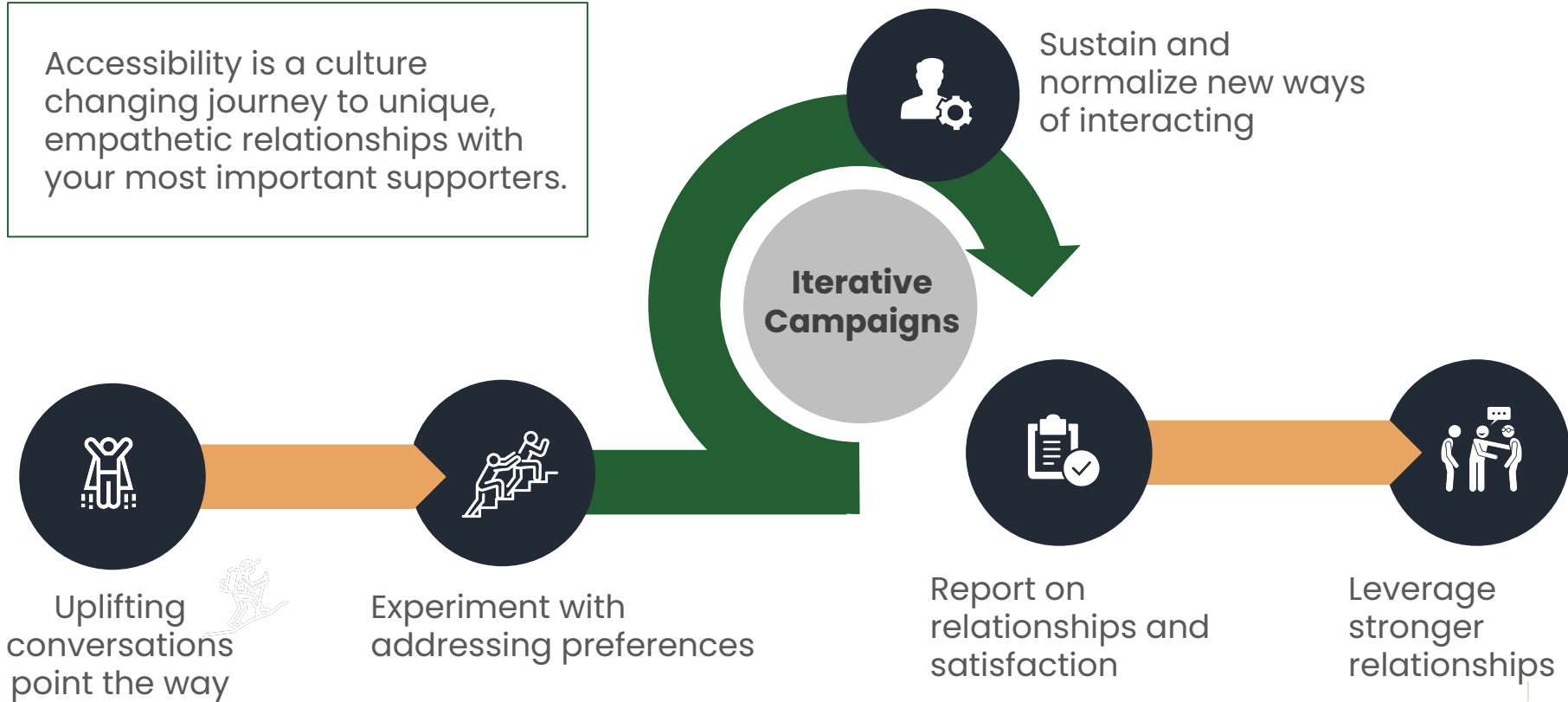
- Are color blind friendly designs easier for them to read?
- Do they prefer a simple text email that they can easily increase the font size for or have read to them by their computer?

## Groups

- Do they enjoy group settings with potentially lots of noise interference? (Maybe they have a cochlear implant)
- Are there particularly good or bad places to seat them?

# Your accessibility roadmap

Accessibility is a culture changing journey to unique, empathetic relationships with your most important supporters.



# Thank you for attending!

## How we can help:

- Contact Model Workshop (1 day)
  - Ideal Contact Model Memo (1 day)
- Capacity for Change Workshop (1 day)
  - Capacity for Change Executive Memo (1 day)

Let's talk: [createchange@parsonstko.com](mailto:createchange@parsonstko.com) | [in](#) @parsonstko

## Presentation resources & links

**SCAN ME**



Or visit:

[parsonstko.com/aasp23-crm](https://parsonstko.com/aasp23-crm)