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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

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Chief Strategy Officer

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Why you need a marketing CTO

Why are all those fancy audience engagement tactics so hard to make part of our day to day?

March 10th, 2021

Either of these sound familiar?

Fundraising: We want to target people who attended an event in 2019, but didn't in 2020, who donated in the last 36 months.

Comms: uhh, yah ok, that list is going to take me a few hours to pull together in excel...

Boss: Why isn't our email list generating more excitement?

You: uhh, well I don't know if our email subject lines are optimized, and the contact data in the CRM from events and donations isn't available in the email system to personalize our sends...

Boss: <Grumpy glower> Why haven't you already solved that problem?
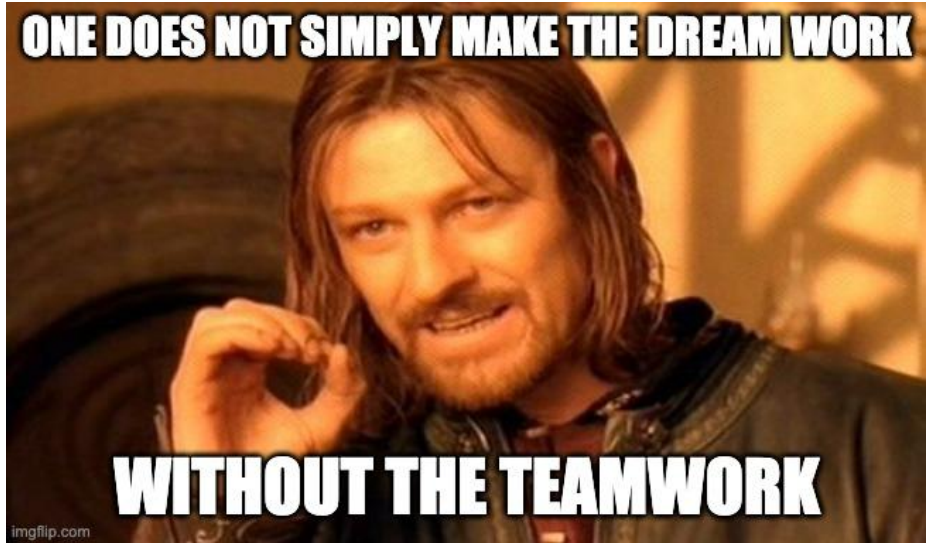
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3

Outreach is a team sport

There are many things that need to be coordinated, collaborated, and governed in concert **in order to make outreach sing**.

Great audience engagement music is made when departments budget, plan, and adapt their own standard operating procedures around a shared vision with one or more other departments.

Unfortunately, most of the time, **internal incentives & priorities prevent this from happening** organically.

Where does it break down?

Governance of "shared systems"

- **Coordinating & announcing changes** one department that owns a system is making that might impact other departments

- **Creating & maintaining "organizational" or "shared platform" requirements** so that newly selected systems can easily integrate and work well with other departments' tools.

Budgeting & Lifecycle Planning

- Determining **how to budget & manage cost sharing** between departments, what's the fair share per party?

- **Stewarding the graceful sunset & replacement** of shared systems?

Focusing on "long term audience cultivation"

- What's your plan for **managing & improving contact records for 5 years,** or for ten?
- Who **manages your roadmap for adding sophistication and evolutionary improvement to your outreach** over the next five years?

Technical Expertise

- **Who has staff, or pays for expert help to select, vet, and discover new technologies**, and what selection criteria do they use?
- When hiring outside technology help **who selects, manages, audits, and coordinates work between multiple vendors** & freelancers?

Mhhm.. yes, yes.. but...

The problems creep up on you slowly

Most of the issues resulting from a lack of coordination, systems integration, or standardization cause more friction and reduce possible quality appear slowly, and aren't apparent immediately.

This combination of slow moving, but seemingly intractable problems often **creates a "tragedy of the commons" situation where no one thinks they caused the problem, and no one is responsible for fixing it.**

It's not really anyone's job...

CTO/CIO - Focused on ensuring everyone can work effectively, managing laptops, and rarely has experience with outreach or marketing.

COO - Focused on budgeting, staffing, and a million other things

Communications Dept - Often asked to keep their hands off fundraising, key contacts, and not seen as the "lead generation" dept.

Events Dept - ahh no, we have a million fires to fight

Fundraising Dept - Very interested in this, but rarely have the mandate, staff, or budget to involve themselves deeply in speculative outreach or "very long game prospecting"

Volunteer Dept - Get a lot of audience insight from a few segments, but often are stovepiped away from the rest of the org

And it is expensive to hire for this role

Chief technical officers **tend to be expensive hires**, and many departments that partially own, operate, or fund your outreach don't want to take on the salary burden of a CTO or senior technical role.

It may be that **no single department needs to fill the capacity of a full time role** and it is common for there not to be an obvious place for this role to sit in your org chart.

Who can save us from this terrible fate?

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Someone who is:

Thinking about how all your outreach systems fit together, and more importantly, how your connected systems can create great audience experiences.

Focused on the long game, figuring out how to build and maintain relationships with your audience over multiple years.

Developing and stewarding **strategies for maturing and adding sophistication to outreach tactics** over time.
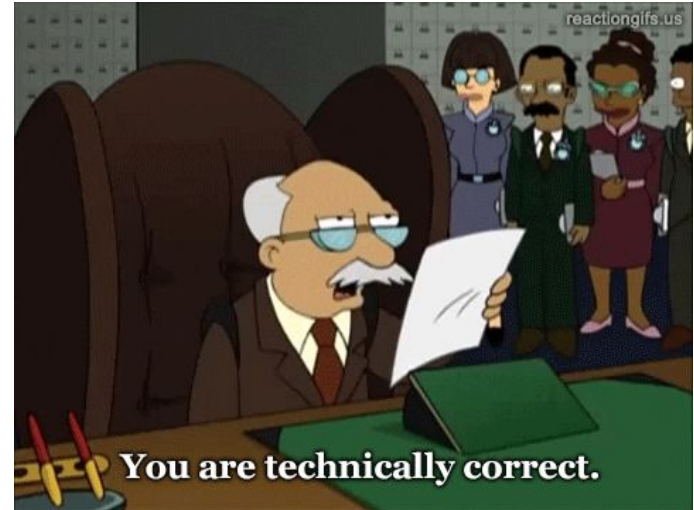
Creating resiliency so that staff turnover and system replacements don't reduce the quality of your outreach

Exploring what else is out there in the world, that you call could be doing. I.E. thinking about **Positive Disruption™**.

Spoiler alert…It's the marketing CTO

Someone(s) needs to be: (**FRIMP**!)

- **Facilitating** conversations between and crafting compromises with different product owners/sponsors
- **Receiving** ideas, complaints, and requests
- **Investigating**, documenting and publicising different departments needs
- **Managing** your enhancements & changes backlog, improvement projects, and prioritizing new requests holistically across your platforms/systems.
- **Proposing budgets** for platform or system lifecycle management

What skills do they need?

- Be comfortable facilitating decisions by **"managing up"** -- Decision makers in your organization need the technical approaches, challenges, system selection choices, and other "left/right" decisions presented to them clearly, without jargon, and with the business impacts & business values laid out clearly in a "pros" and "cons" format.

- Have **strong communication skills** and be able to translate abstract technical concepts and challenges into visual descriptions, easy to follow text, and yes, even powerpoint slides.

- Have **empathy for stakeholders** and decision makers who are trying to quickly get up to speed with choices

- **Build trust by allowing others to weigh in** and offer perspectives on decisions, and make it easy for them to do so through process & communications

I thought a CTO needed to be, you know, uhmm...technical?

Sure, that helps, but...

Many technical skills, and outreach systems expertise (such as CRM) are becoming commoditized.

It isn't cheap to have an army of developers on staff, but **you can access outside expertise at an hourly rate that is accessible** for most organizations. (Once you get over the hourly sticker shock)

What does your CTO need to access outside help effectively?

- Have a solid understanding of your most important outreach systems.
  - What does what
  - What's integrated with what
  - Which vendors support what depts/systems
- Be comfortable discovering and hiring outside help
- Be process & governance minded

Great, but we still don't have a marketing CTO...

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Time to come together, as one!

Don't let the perfect be the enemy of the good. If you can't afford a dedicated CTO, there are ways to **achieve much of the benefit with process, governance, and fractional time commitments** from your staff.

The critical path to success is to **make sure your platform is managed LIKE it has a CTO**, and there are several approaches for management beyond a single CTO staff person.

The CTO by committee

- Each dept using or managing an outreach platform needs to send a champion.

- Governance & decision making rules must allow for reasonably fast decisions that depts will abide by.

- A shared backlog of changes & enhancements to all systems needs to be maintained and allow depts to jointly perform change management.

- Depts agree to fund not just licensing of platform tools, but also maintenance & enhancements.

- The committee must be able to hire expert help.

THE PARTY PLANNING
COMMITTEE IS ALL OVER IT.

The knighted non-technical CTO

- Should be well liked and respected by your executive team, or at least your department heads.

- Must have strong communication skills

- Needs experience (or needs some professional development budget) to learn "product management" skills.

- Needs a budget to hire outside expert advisors

- May need a new boss such as your COO vs reporting to a dept head who controls part of your engagement platform.

What a strange person.

The quarterly course correction

- Departmental champions and their seconds come together for quarterly workshops

- These will need to be longer meetings, perhaps ½ a day or full days.

- Information gathering & reporting on platform components, changed needed, and lifecycle status of tools will need to be democratically assigned before this meeting, and will vary in quality

- A facilitator should be appointed to help facilitate decision making, and ensure the agenda is managed.

The fractional marketing CTO

- Weekly management of your engagement platform

- Offloads the platform backlog and capturing technical requirements from your staff

- Gives you access to broad experience with similar challenges beyond your own organization

- Ensures you have deep technical expertise to inform discussions and allow exploration of alternative approaches

- Provides a neutral third party perspective on your organizational priorities & possible ROI on technology investments.

Maybe you can be the bat person!

- Assess your engagement platform's current health
- Run a workshop to gather cross-departmental needs, challenges, and planned changes
- Begin planning your technology roadmap
- Identify the missing components of your Engagement Architecture, audience engagement strategy, and contact model.

A conversation is all you need to start

Think about bringing together your departmental champions & leaders to discuss:

- Which departments are involved in outreach, and how could they coordinate better?

- Who are your technical experts, and how can they be better leveraged to help with identifying needed governance, useful but missing integrations, and frequent pain points that can become part of your longer term planning?

- What audience data could you combine & improve to offer better outreach. (For instance if you only knew which email list members, came to which events on what topics…)

- How can you jointly budget for managing & enhancing systems, and planning for their replacement lifecycle?

Any questions?

Would you like to continue the conversation?

in linkedin.com/in/nateparsons/

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Want to dive in?

parsonstko.com/project

How did we do?

Please let us know by filling out our survey.

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