



PARSONS | TKO

Welcome

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- Please post any questions using the Q&A function and share any comments in the chat
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and share it in the chat!**



PARSONS | TKO

Turning your strategic plan into tactical reality

Finding the treasure buried in your process, technology, and team

May 24, 2023

Meet our presenters

*Molly "Scallywag" Plunderer of
the Archipelago*



Jamie Mueller

Chief Growth Officer

Johnny "Red Locks" Greep



Nate Parsons

Chief Strategy Officer

Byrd Zell 'Evil Turner'

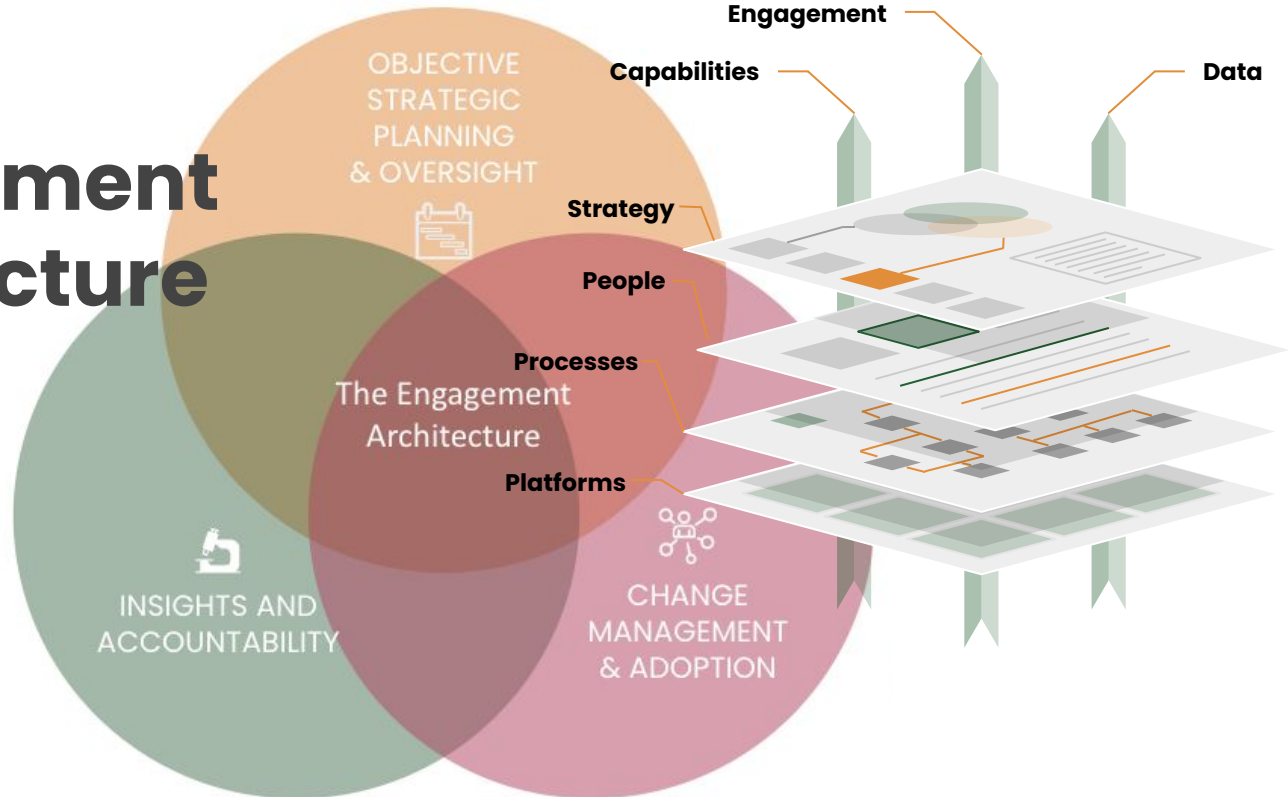


John Harrison

Solutions Producer

The PTKO Difference

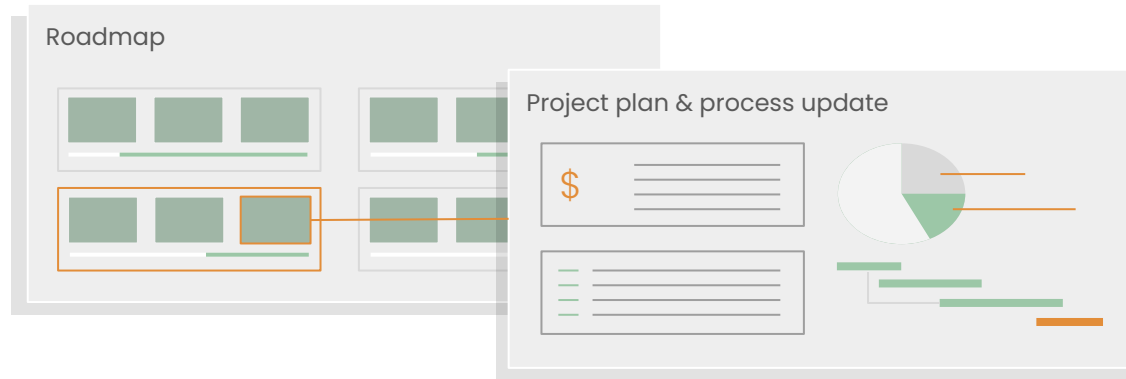
Engagement Architecture



What is the difference between a strategic plan and a roadmap, and how do the two work together?



Data, Technology or Outreach Strategy Roadmap



Projects in a roadmap detail both long-term strategic and tactical implementation implications, including:

- Strategic impacts
- Division affiliation
- Business process implications
- Capabilities enabled
- Lifecycle expectations
- Timing & duration
- Effort level & cost
- Complexity
- Dependencies
- Leadership requirements
- Phases (“minimum viable product” to mature)



**How does a
roadmap **build**
on your strategic
plan?**

Poll: How many
of you feel
prepared to
pursue your
strategic plan?



How do you
start this
**roadmapping
process?** How
do you know
you're ready?



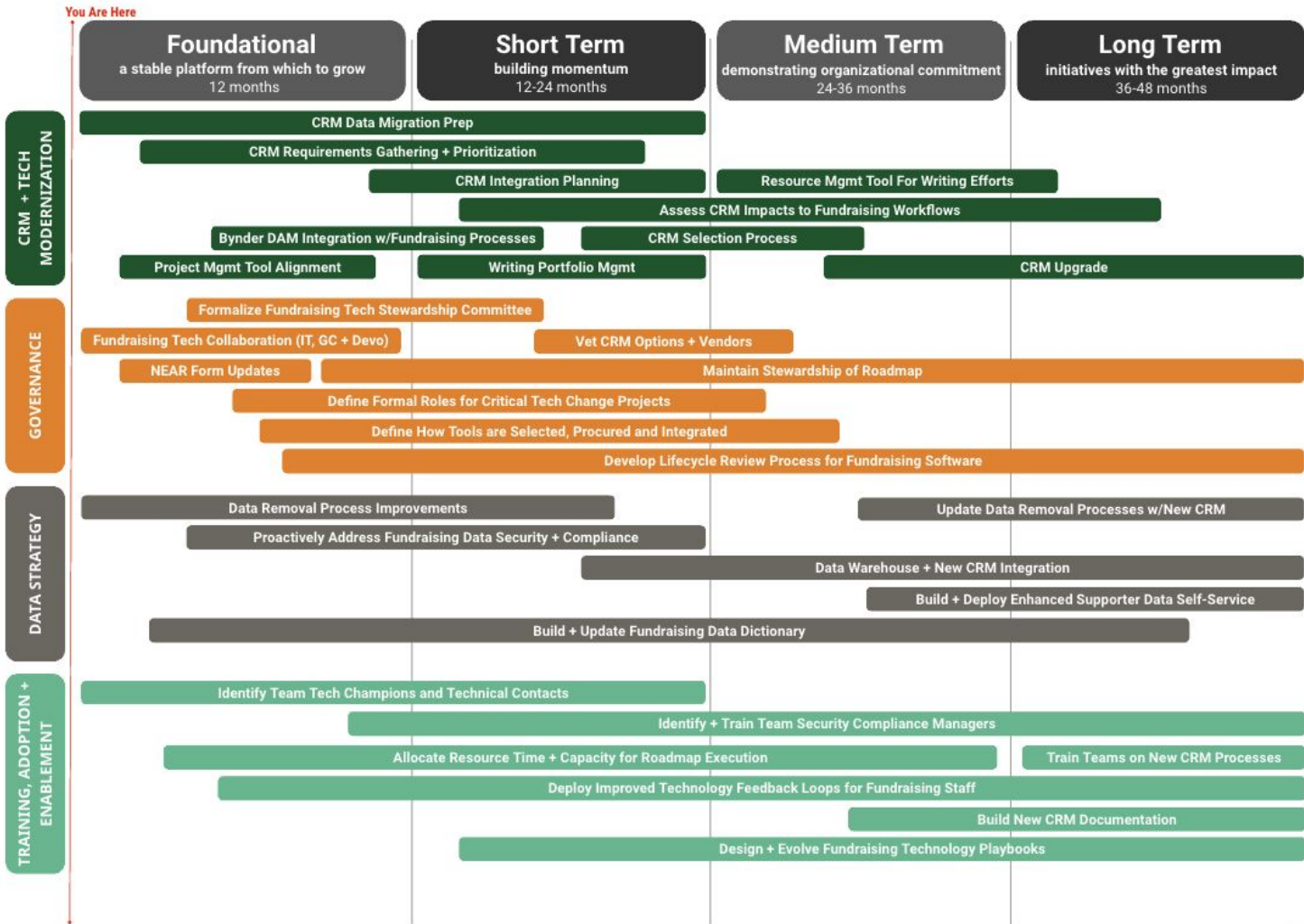
Fundraising Technology Roadmap

Legend

PHASES

Swimlane Categories

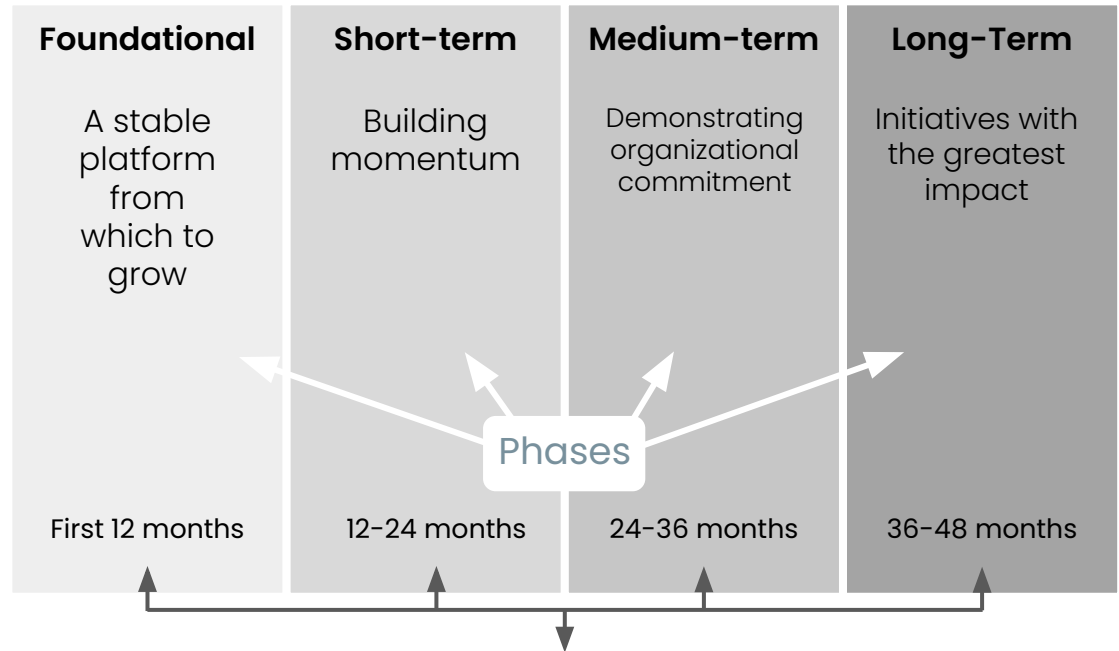
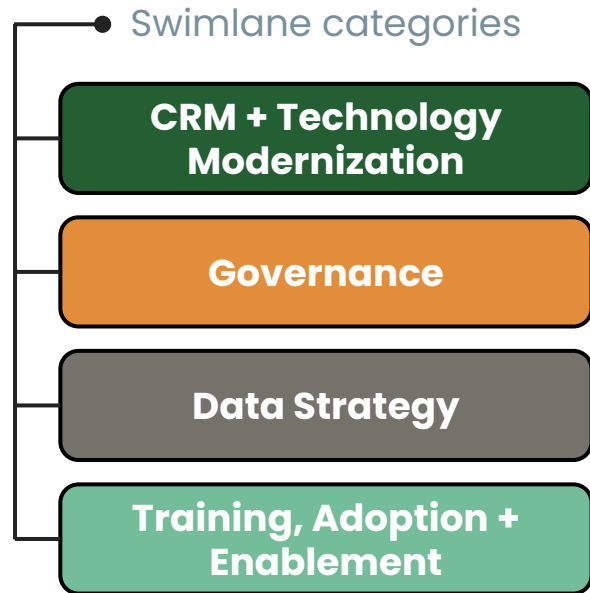
- CRM + Tech Modernization
- Governance
- Data Strategy
- Training, Adoption + Enablement



When is a roadmap unsuccessful?



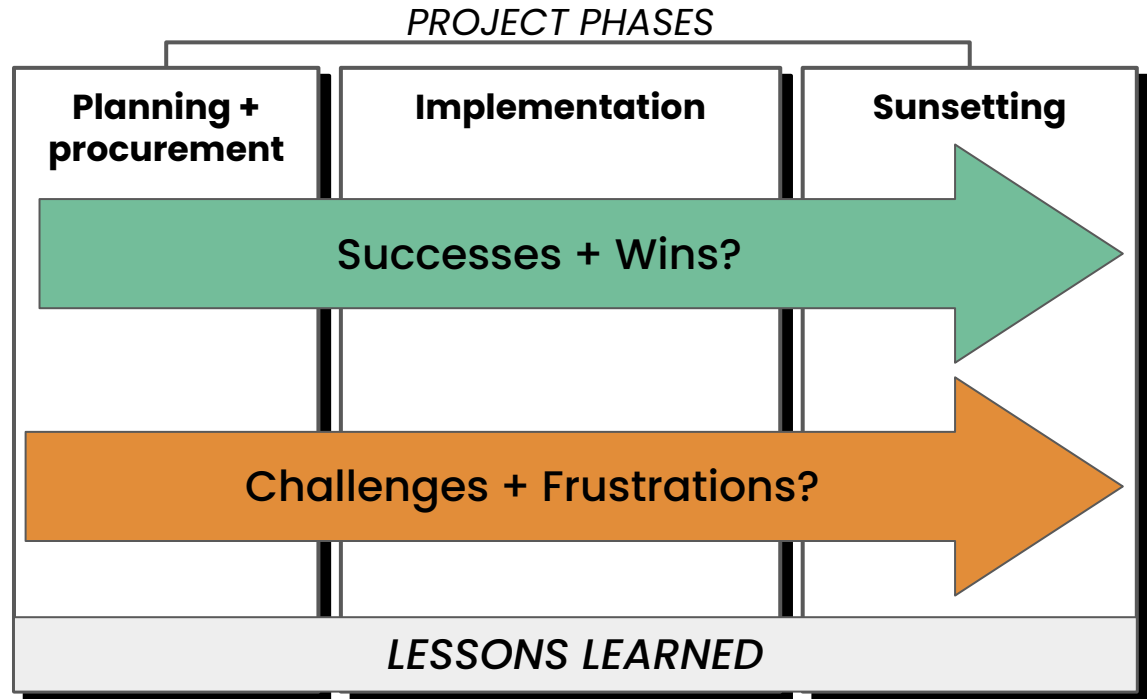
Major Swimlanes and Phases of the roadmap



These phases are flexible. They can be elongated or truncated as needed to lessen the impact on ongoing fundraising efforts; however, current cost and effort estimates are based on a four-year roadmap.

What is your organizational capacity for change?

- What's made change projects, large and small successful in the past?
- Where and why have they gone off the rails?
- What are the lessons learned that can be applied to your roadmap?

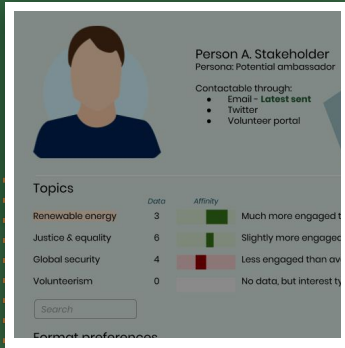


Last Words



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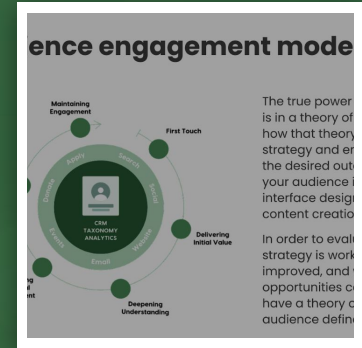
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