## COMMON PROJECTS

Below is a summary of common Taproot+ projects

### Business Development
- Board reporting dashboard
- Business strategy coaching (30 hours of coaching)
- Cost-reduction analysis
- Financial auditing
- KPI Development
- Market research
- Pitch development (business proposal/grant writing)
- Project management
- QuickBooks help
- SWOT analysis/Environmental scan

### Marketing/Communications
- Brand strategy
- Communications plan
- Copy writing/editing
- Design (logo, brochure, annual report, one pagers, letterhead, websites)
- Digital marketing (social media strategy, Google AdWords)
- Key message development
- Media relations strategy
- Multimedia (photography, videography, presentation deck)
- Public relations plan

### Information Technology
- CRM optimization
- IT systems/network audit
- Mobile app development
- Website application development
- Website platform transfer

### Human Resources
- Board development (gap analysis, evaluation process, recruitment messaging)
- Board effectiveness
- Change management coaching + recommendations
- Employee handbook
- HR Systems audit + recommendations
- Performance management process
COMMON PROJECTS

Business Development

Board reporting dashboard
A Board Reporting Dashboard project translates a nonprofit’s strategic and operating plans into a simple set of metrics that covers financial, administrative, programmatic, and governance performance. The board of directors can use the dashboard to quickly focus on the key drivers of the organization’s success.

Cost-reduction analysis
A cost-reduction analysis is a tool for determining which costs an organization can cut without impacting its ability to deliver on its mission. The analysis delves into administrative and operational expenses, workflows, and the supply chain for goods and services to show where excess resources are being used and can be reduced or eliminated.

Financial auditing
The primary purpose for financial audits is to give regulators, investors, directors, and managers reasonable assurance that financial statements are accurate and complete.

Business strategy coaching (30 hours coaching)
Coaching to increase management competencies and practices that facilitate the planning process can have a positive impact in making strategy development and implementation achievable with confidence, efficiency, and full use of organizational resources. Coaching can be applied during any phase of business strategy development. Preparing the team for strategy development provides opportunities for individual and team coaching designed to maximize outcomes, establish clear roles and relationships, and ensure that new and existing competencies contribute to measurable results.

KPI Development
Key Performance Indicators help an organization to monitor its operational health. This project identifies what success looks like in terms of operations and develops the right metrics to measure performance. Using data effectively to monitor performance is critical for organizations to continually improve their operational efficiency and fulfill their mission.
COMMON PROJECTS

Business Development

Market research
An organization can use a market research project to gather and analyze external information about an issue area, program design, and/or operating environment. The organization can then use the synthesized information to make an improved decision on how to make progress on its goals.

Pitch development (business proposal/grant writing)
A business pitch is not only a crucial tool for your organization, it is also one of the best tools you can use to flesh out your business concept, iterate it through different variations, and find a business model that works and will turn into funding.

QuickBooks help
No matter what the nature of your business, keeping an accurate set of books is essential. Without accurate business records, it will be difficult to attract the funding you need because business records are generally the first thing potential lenders and investors want to see. Using QuickBooks to keep your business records lets you avoid those potential problems.

Project management
Many projects involve large-scale planning that affects every department or aspect of a business. Implementing the project may mean dealing with human resources, budgetary, and supply constraints. Accredited project managers are skilled in project management techniques specific to dealing with one-time projects. Organizations that use project management to monitor and control processes and schedules can more effectively complete their projects on time and on budget.

SWOT analysis/Environmental scan
This project lays out an organization’s strengths and weaknesses (factors related to the organization), as well as opportunities and threats (factors related to the organization’s environment). It helps an organization to understand what makes it unique and develop a strategy to protect itself against threats and identify opportunities to pursue.
Common Projects

Marketing/Communications

Brand strategy
Your brand is your promise to your customer. It tells them what they can expect from your services, and it differentiates your offering from your competitors'. Your brand strategy is how, what, where, when, and to whom you plan on communicating and delivering on your brand messages. Where you advertise is part of your brand strategy. Your distribution channels are also part of your brand strategy. And what you communicate visually and verbally are part of your brand strategy, too.

Communications plan
A communications plan is a written document that describes what you want to accomplish with your association communications (your objectives), ways in which those objectives can be accomplished (your goals or program of work), to whom your association communications will be addressed (your audiences), how you will accomplish your objectives (the tools and timetable), and how you will measure the results of your communications efforts (evaluation).

Copy writing/editing
Beyond making a strong impact, an organization needs compelling messaging to articulate its work and successes to potential and existing supporters, its board, and other stakeholders. This project edits an organization’s existing written content and crafts new messaging that connect emotionally with its target audience.

Design
This project includes graphic design for key marketing collateral. Common design projects are for logos, brochures, annual reports, one pagers, specific website graphics.

Digital marketing (social media)
A social media plan gives an organization a roadmap for engaging its stakeholders with social media tools. The plan will connect the communications strategy and messaging identified in the organization’s communications plan with the best social media applications for reaching external audiences.
Marketing/Communications

Digital marketing (Google AdWords)
A Google AdWords plan helps a nonprofit strategize on maximizing the benefits of an advertising grant from Google. This project will review the nonprofit’s targeted audience and marketing tactics to write copy that has the right keywords and follows Google’s guidelines.

Key message development
Simply put, messaging is a term to describe how you talk about who you are and why you exist as an organization. It communicates key points you consistently make when you reach out to your audience and it always ties back to your brand. Different messages can be developed for different purposes, such as speeches, fundraising campaigns or presentations. A well-crafted message will highlight your unique benefits, target your audience, support your mission and often include a call to action.

Media relations strategy
Media relations involves working with media for the purpose of informing the public of an organization’s mission, policies and practices in a positive, consistent and credible manner. This means coordinating directly with the people responsible for producing the news and features in the mass media. Public relations and media relations are not the same. Media relations refers to the relationship that an organization develops with journalists, while public relations extends that relationship beyond the media to the general public.

Multimedia (photography, videography, presentation deck)
A multimedia project helps an organization to reach and engage with clients, supporters, and prospective stakeholders through multimedia, such as photos, a podcast, video, slideshow, and/or webinar. The multimedia item can be integrated into an organization’s website, events, social media outreach, advocacy, and fundraising campaigns.
Public relations plan

A public relations plan identifies an organization’s communications goals and target audiences, then develops strategies to achieve its objectives. The plan can include recommendations for a broad spectrum of tools to execute the strategies, including a PR calendar, media lists, coaching on media relations, media training, news releases, speeches, and press kits.
CRM optimization (projects include: basic Salesforce set up, optimize field configuration for management and reporting, data migration)

This project can help you set up a basic version of a CRM database, including Salesforce set up. This project can also help improve the configuration and/or administration of your existing CRM. Customer relationship management is the strongest and the most efficient approach in maintaining and creating relationships with customers.

IT systems/network audit

Ensuring security, integrity and availability of IT systems and data is essential for the successful operations of any type of organization. One of the most important aspects of maintaining secure and reliable IT infrastructure is tracking and validating all changes to systems and applications. The problem of the IT infrastructure change management in many environments starts with Active Directory and extends across all other systems throughout the entire IT infrastructure, including the need to audit group policy settings, Exchange Server mailboxes, access and modifications to files, SQL Server databases, SharePoint and more.

Mobile app development

A Mobile phone app is a dynamic way for an organization to engage with existing stakeholders, attract new supporters, and raise the visibility of its mission and work. An app is created to suit an organization’s needs, whether that be sharing news and information, fundraising, mobilizing volunteers, communicating with clients, collecting data, or increasing awareness of a cause.

Website application development

This project can help you add a new feature to an existing website or troubleshoot functional issues in navigating and managing your site.

Website platform transfer

Are you or your staff having trouble managing the maintenance of your website? This project can help you migrate your existing website to a new, friendlier platform.
Board development (separate projects include: gap analysis, market analysis, recruitment/marketing tools)

A board can and should do more than fundraise, but building an engaged and effective board of directors is one of the most difficult tasks a nonprofit can face. A board recruitment project helps a nonprofit outline the right board team for its specific needs and develops the marketing tools needed to build a solid board pipeline that consistently brings in the right candidates.

Board effectiveness

Board Effectiveness measures a nonprofit's board capacity and performance. It typically looks at the board's governance practices, stewardship, membership, resource generation, and CEO management to help guide a board on how it can best help the nonprofit it serves.

Change management coaching and recommendations

Change, whether driven by internal or external conditions, can be challenging for any organization. This project develops strategies and processes to support the successful implementation of the change using skills training, leadership coaching, and culture adjustment.

Employee handbook

If you have more than a few employees, it's a good idea to create an employee handbook that clearly explains your workplace policies. The benefits of having an employee handbook are many: Every employee receives the same information about the rules of the workplace; your employees will know what you expect from them (and what they can expect from you); and you'll buy yourself valuable legal protection if an employee later challenges you in court.
Human Resources

HR systems audit and recommendations

The human resource audit is based on the premise that human resource processes are dynamic and must continually be redirected and revitalized to remain responsive to ever changing needs. Human resource audits are not routine practices aimed at problem solving. Instead of directly solving problems, HR audits, like financial audits, help in providing insights into possible causes for current and future problems. The findings of these audits aid decision making in the organization and are usually internal documents that need not necessarily be shared with the public. Moreover, unlike financial audits that are routine, regulated and standardized, human resource audits are non-routine and may be designed to cater to the unique needs of the organization at a particular point in time.

Performance management process

A strong performance management system increases staff satisfaction and effectiveness while improving an organization’s ability to fulfill its mission. The right system helps leadership and staff clarify personal objectives, align them with organizational objectives, and receive regular feedback to learn from past performance and continuously improve.