Convio Common Ground™ Simplicity, Flexibility and Choice for Nonprofit CRM Frequently Asked Questions
September 17, 2008

General Questions

Q) What is Convio announcing today?
A) Convio is announcing general availability, a free trial program and the features, functionality and pricing for Common Ground, a revolutionary new constituent relationship management (CRM) product that is providing simplicity, flexibility and choice for nonprofit organizations.

Q) Why did you name the product Common Ground?
A) This new solution has the potential to change the nonprofit space as we currently know it by providing a simple way to access constituent data, a single view of all online and offline information and new levels of flexibility and immediacy never before available to the nonprofit sector. We wanted a name that reflected these novel ideas and the fact that this new product breaks through the boundaries of traditional donor management.

As we researched the various options, one thing became very clear: all organizations want a common ground on which they can work to further their missions.

We feel Common Ground represents the common interests of nonprofits: an open platform versus a proprietary system; a solution supported by hundreds of partners and add-on applications versus a single vendor; and understanding the full constituent relationship versus just a small slice.

Q) How does Common Ground change the evaluation, buying and ownership experience for nonprofits considering a donor database?
A) By visiting www.convio.com/cgtrial or by simply clicking on the "Get it now" link on the salesforce.com AppExchange, the nonprofit organization or individual can try a fully functional version of Common Ground. They can enter data, customize reports, review online training materials and see for themselves the simplicity and flexibility of Common Ground. They can also click on a demo link that lets users view a step-by-step demo of a use case created through research on how nonprofits might use the software.

If the organization likes the software they can simply click to buy. They can begin using the full functionality immediately with no hardware to buy or software to install.

Common Ground eliminates the need to install and run the application on the customer's own computer as well as the associated IT burdens, hassles and headaches. This on-demand delivery model offers a "better way" to support the mission-driven focus of nonprofit organizations with software.

Q) How does the free trial work?
A) Nonprofits seeking to evaluate Common Ground can register for a free 30-day fully-functional version of the product. Simply complete the trial registration form at http://www.convio.com/cgtrial and an installation will be immediately created with sample data. Login instructions are sent to the registrants email address. The trial provides the administrator with unlimited use of the product plus one additional seat license they can grant to a fellow staff member. During the trial users will also have read-only access to the Common Ground user community allowing them to learn from peer organizations and seek answers to frequently asked questions. If the organization decides to purchase Common Ground their trial will be converted to an active installation of the product and all pre-loaded, sample data removed.

Q) What is new and different about Common Ground?

A) Common Ground is a new, web-based constituent relationship management (CRM) system designed specifically for nonprofits that help nonprofits track all interactions with donors and other supporters. Common Ground provides a simple and flexible tool that help nonprofits focus on their mission, fundraising, advocacy and communications results instead of managing and maintaining software and technology infrastructure.

Key features include:

Donor Management – nonprofits can track all gifts, build revenue forecasts, find prospective donors and monitor major donor opportunities from one application.

Relationship Management – nonprofits can link constituents to households and organizations and define relationship types to create a complete profile of your contacts and constituents. Track all interactions, whether 1:1 or from targeted bulk campaign outreach.

Convio Online Marketing Integration – nonprofits have "hands free" automated synchronization with Convio's online marketing products to capture all online record changes, gifts and major interactions.

Custom Reporting – nonprofits can start from scratch or clone an existing report and make it your own. Define summary counts, record groupings, simple or advanced filters, time-period criteria and share with other team members or keep private.

Openess – because Common Ground is an open platform supported by a vast network of technology and strategy partners it is easier to turn ideas into applications that support their processes, programs and needs. Integration with mobile technologies, social networking, or other new and emerging technologies, or integration with financial and accounting or nonprofit management applications is easier and provides a quicker time-to-value.

Q) What is the price of Common Ground?

A) Common Ground pricing begins at $100 per named user seat per month. All purchased seats receive access to all support resources with no limitations. Interested individuals/organizations can register for a 30-day free trial and begin using the software immediately. Because it is available online and accessed via the web browser, nonprofits will experience a new, faster, easier way to evaluate, select and get started with their constituent relationship management system.

Q) How does this compare to other CRM offerings for the nonprofit market?

A) Common Ground is the only offering built for the way people in nonprofits work, not the way software developers think. It is the simplest, most flexible and open offering available to nonprofits. Common Ground helps bring together today's more highly-developed communications techniques and channels with people and resources so nonprofit professionals can focus on their mission and results. Because of the innovative technology behind Common Ground we can do this in a more affordable way.

Technology/Implementation Questions

Q) What do you mean by legacy and on-premises software?

A) On-premises software is installed and run on computers on the premises (in the building) of the person or organization using the software. The on-premise approach to deploying and using business software was the most common until around 2003, when the software-as-a-service, simply defined as software running at a remote location became widely available and adopted. The modern, SaaS deployment and use model uses the Internet to remove the need for the user to install any software on premises and has accompanying benefits: running software remotely can result in considerable cost savings because of reduced staffing,

maintenance, power consumption, and other factors. When we mention "legacy" we mean the old way of buying and deploying software.

Q) How does the Software-as-a-Service model reduce costs and create efficiencies for nonprofit organizations?

A) SaaS eliminates the need to install and run the application on the customer's own computer as well as the associated IT burdens, hassles and headaches. This on-demand delivery model offers a "better way" to support the mission-driven focus of nonprofit organizations with software. The SaaS model helps nonprofits minimize the time spent on lower-value activities and allows people to use technology to focus on strategic activities that have a greater impact on the organization and those they serve. In short focus on their mission, not their infrastructure.

The bottom-line benefits to using a SaaS-based vendor for online fundraising, marketing, advocacy and constituent (donor) management are clear:

- better control costs and drive efficiency,
- increase revenue,
- know supporters (constituents) better than ever,
- empower constituents and staff, and
- use technology to remove complexity, create mission value and drive results.

Q) What is the Force.com Platform?

A) Force.com, the world's first platform as a service (PaaS) for business applications, is an integrated set of tools and application services that ISVs and corporate IT departments use to build enterprise applications and run them on the same infrastructure that delivers the Salesforce applications. This breakthrough new concept is making companies radically more successful by letting them translate their ideas into deployed applications in record time. Force.com was created by salesforce.com, the market and technology leader in Software-as-a-Service (SaaS) and Platform-as-a-Service (PaaS) with more than 43,600 customers.

Q) How is this new product different from the salesforce.com nonprofit template?

A) Common Ground is an entirely new product developed specifically for the constituent management needs of nonprofits. It is a simple, flexible, and powerful system built on Salesforce.com's Force.com Platform. Common Ground provides feature rich donor and relationship management capabilities,; a single view of constituents and better management of all interactions be they online or offline; and, greater flexibility and more highly customizable features. The Nonprofit Template has leveraged the standard salesforce features which were designed for sales automation, and modified them to more closely match the terminology of nonprofits. Common Ground is built from the Internet up to support the modern needs of nonprofits.

In addition, Convio continues to invest in Common Ground and develop a comprehensive product roadmap. At this time the saleforce.com nonprofit template does not have dedicated product engineering, support, training or other resources that a nonprofit might need.

Q) How difficult is it to implement Common Ground? Is there a tremendous amount of technical expertise required?

A) Common Ground changes the rules and delivers more efficient and effective way of managing relationships and resources. Our charter program clients have been delighted with the simplicity, flexibility and functionality of Common Ground. When we created Common Ground we knew it had to be capable of serving the entire organization, not just one department, and it needed to be built on technology that the IT professionals would easily support. From a free online trial to a user interface that was developed based on research into how people use software to work, everything about Common Ground is easier, more flexible,

intuitive and less expensive. As one of the bloggers in the nonprofit sector who is not a "developer or programmer" put it, "Convio is building CRM for the rest of us."

Q) Do nonprofits have a problem with storing all of their critical data in a location outside their offices?

A) No. Security and storage of important data is and should be a concern for all organizations regardless of where the data is stored. As more and more nonprofits and Fortune 500 companies adopt the SaaS-model the early concerns over storing data outside of the physical office are less of a concern. In fact, more than seven out of 10 (73 percent) of the 100, Fortune 500 executives interviewed in a survey conducted by Kelton Research stated their enterprise has adopted SaaS or plans to adopt SaaS within the next 18 months. Convio and our partner salesforce.com, use some of the most advanced technology for Internet security available today. Organizations who host their own data must spend enormous resources to protect their data and networks. By selecting the SaaS-model nonprofits can focus on their mission, while working with the experts who understand protecting clients and their data is a multidimensional business imperative that must be taken seriously to.

Q) How difficult is it for nonprofits to change from their existing database to Common Ground?

A) Migration is an important component of the Common Ground offering through our partner network. Traditionally migration can be difficult, but because Common Ground is built on an open platform and it is supported by a large network of Convio and salesforce.com partners, nonprofits will benefit from their expertise, sophistication and the lower costs provided through competition for services. Many of these partners have experience in moving data from proprietary and legacy, on-premises software to the Force.com platform for Fortune 100 companies and small businesses. That experience and the tools to support your needs are now available to the nonprofit sector at an affordable price.

Compared To Other Convio Products

Q) What is the difference between Common Ground and Convio's online marketing and fundraising products?

A) Common Ground is an entirely new, open, web-based constituent relationship management system for tracking all constituent interactions across all channels, online and offline. Built and delivered natively on salesforce.com's Force.com Platform, the product offers an on-demand solution that easily integrates with Convio's online constituent relationship management suite to provide powerful tools that help nonprofits focus on their mission, fundraising, advocacy and communications results instead of managing and maintaining software and technology. Common Ground is and can be used as a standalone solution for a nonprofits database needs, but also easily integrates with Convio's online fundraising and marketing applications. Because it is built on an open platform, it will more easily integrate with other applications and technologies as well.

Q) How is this different than Convio's Constituent360™ database?

A) Simply put, Convio's Constituent360 supports a 360 degree view of an individual's online interactions and relationship with an organization. While most clients add additional information to supplement the online interactions, most organizations track other offline interactions separately, which requires a DataSync between the two applications. Common Ground is a simple, flexible CRM product that operates as the organizations database-of-record. Tightly integrated with Convio's Constituent360, all common online interactions are tracked in Common Ground, as well as, all biographic information being synchronized between the two. However, Common Ground allows organizations to track even more.