

# CONVIO SOLUTION PROVIDER

## Guide

AUTHORIZED

Get moving with new opportunities to expand your business around Convio products

“We at Event 360 stay well-versed in delivering deployment and related services to Convio's growing client base. Our partnership helps us grow and gives our clients the help they are seeking, while allowing Convio to serve clients faster and with consistent quality. It is truly a win-win situation for everyone.”

— Jeff Shuck, President, Event 360



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## OVERVIEW: CONVIO SOLUTION PROVIDER PROGRAM

Convio is the leading provider of on-demand constituent relationship management software and services for nonprofits. Our products give nonprofits a better way to inspire and mobilize people – to really *move* people – to support their organization. To help ensure that our clients get consistent, quality service around their Convio products, we've created the Convio Solution Provider (CSP) program.

The goals of the CSP program are simple:

- Deliver our online marketing and CRM products to more nonprofit organizations
- Help those organizations be more successful using our products

As a company serving the nonprofit sector, you can take advantage of new opportunities to expand your business by joining the CSP program. As a CSP, you'll give a growing base of Convio clients the help they need to reach their goals and make the most of their investment in Convio products. We'll give you the information you need to offer significant experience and knowledge with consulting and implementing Convio products.

To ensure you get the most from your CSP partnership with Convio, we'll provide you with ongoing priority support, exclusive educational resources, co-marketing opportunities, and a "seal of approval" (right) that you can display on printed and web-based materials. And, because the Convio Solution Provider designation means that we recognize you as an expert on Convio products, we'll promote you to our clients.



The CSP program really *means* something – to our clients, to you, and to us. In order to maintain the integrity of the program and to ensure a consistent level of quality service for our clients, we require you to have individuals on staff who are authorized on the products for which your company wishes to be a CSP. We also require you to have a signed CSP agreement with Convio.

This guide gives you more detail about benefits and requirements of the CSP program.

## BENEFITS: WHAT'S IN IT FOR YOU

The Convio Solution Provider program is designed to give you the tools you need to expand your business by helping to service a large and growing base of Convio clients. The CSP program offers benefits and resources that help you optimize the program for your business while helping to ensure our clients' success.

These benefits and resources will help you to better service Convio clients, uncover new business opportunities, and strengthen your brand in the nonprofit sector. The following chart summarizes the benefits available to CSPs.

### Benefits at a Glance

	<b>CSP Benefit</b>
Training	Implementation methodology, best practices, and Convio products
Lead referral reward	With addition of Referral agreement, 10% of first year software licensee,
Use of "Authorized Solution Provider" seal	Provided for website and print use
Software access	Administrative access to instances of clients for which you have active projects
Product sandbox	Sandbox for products on which authorized for use for product learning and testing solutions for clients
Technical Support	Dedicated support professional
Partner Account Manager	Dedicated Partner Account Manager
Partner Portal	Mutual information sharing on joint projects
Online Convio Community	Access to public groups and exclusive resources just for CSPs
Partner directory listing	Logo, website link, description, searchable by specialization
Co-marketing	Opportunities for co-speaking, case studies, articles, ads
Use of Convio corporate logo	In context of partnership
Partner update emails	Helpful updates on Convio products, best practices, business
Convio Summit sponsorship	Opportunities to promote your company to Convio clients

## Benefits Detail

### General Benefits

- **Training** — See pages 7-11 for details about training.
- **Lead Referral Rewards** — As a CSP, you can also sign a Convio Referral agreement so you can receive 10% of first year product fees<sup>1</sup> for business referred to Convio that results in a closed deal.
- **Use of “Authorized” Seal** — You'll earn the right to display the authorized Convio Solution Provider seal on your website and printed marketing material.

### Support Resources

- **Software access** — As a CSP you will get access to your clients' software instances upon their approval. For Luminate Online, you will get advanced site administrator access to the Convio sites you're working in for your clients. This is an enhanced administrative role that grants you access to the PageWrapper Editor, Message Catalog Editor, Database Configuration, and additional Site Data Parameters for site configuration. As a CSP for Common Ground or Luminate CRM, your client will temporarily grant you one of their licensed seats in their instance as you work with them through their implementation.
- **Product Sandbox** — As a CSP for Luminate Online, you will receive access to a live instance that you can use to showcase your work and discover implementation solutions for your clients. As a CSP for Common Ground or Luminate CRM, you will receive a trial instance of Common Ground or Luminate CRM with 10 seats that you can use as a learning tool within your company and to test solutions.
- **Technical Support** — As a CSP, you will have access to a dedicated Convio support professional and technical resources. Support is offered via telephone and online. Our goal is to reply to your inquiries in the most efficient and effective means possible so you can serve your clients successfully.
- **Partner Account Manager** – You will receive a dedicated Partner Account Manager to meet with regarding your projects.
- **Partner Portal** — You'll use this web-based portal as your tracking system for your current Convio projects.
- **Online Community** — You'll have access to a partners-only area of the Convio Community where you can access on-demand training, implementation, and sales resources, and also participate in conversations with other Convio partners.

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<sup>1</sup> Does not include revenue from TeamRaiser.

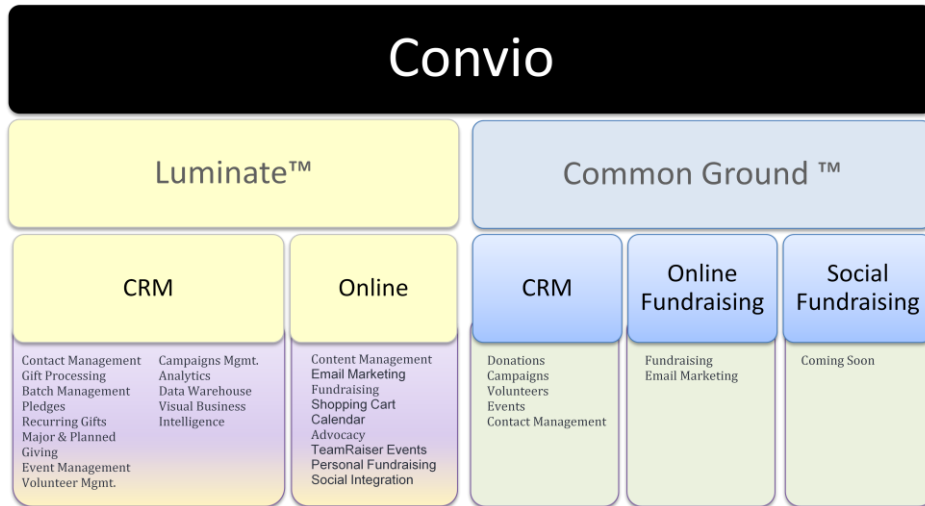
## Marketing and Sales

The CSP program provides you with multiple ways to engage with Convio and increase awareness of your company in the nonprofit sector:

- **Partner Directory** — As a CSP, you'll receive a listing on our searchable partner directory on Convio.com (see [www.convio.com/partners](http://www.convio.com/partners)). Your directory listing will include a detailed profile, will identify your company as “authorized,” and will link to your website.
- **Co-marketing** — As a Convio Solution Provider, you have opportunities to work with us to drive new business leads and build awareness for each of our brands. These opportunities are subject to availability, and as agreed upon by both you and Convio:
  - Joint case studies, press releases, and speaking at industry events
  - Co-written industry articles
  - Opportunities to place partner contributed article(s) in the *Convio Connection* newsletter and/or posting(s) on the *Connection Café* blog
  - Opportunities to promote your capabilities and successes to Convio
  - Participation in marketing programs, including seminars, webinars, papers, and emails
- **Use of Convio Brand and Logo** — As a CSP, you may use the Convio name and logo in your marketing material in the context of your partnership with Convio. The logo must be used within corporate logo guidelines found at: [www.convio.com/convio/news/logos-and-specifications.html](http://www.convio.com/convio/news/logos-and-specifications.html).
- **Partner Updates** — All Convio partners will receive partner updates via email. These emails will keep you updated on product releases, Convio news, the latest resources, and other information that will help you promote your business.
- **Convio Summit Sponsorship** — Convio's can't-miss annual client event draws more than 700 clients for workshops and sessions to promote client success on Convio products. Sessions cover a range of topics, including advanced administration, interactive strategies, and technology trends. Convio offers a variety of sponsorship levels that give you exposure to Convio clients. All partners are given the opportunity to participate as sponsors and/or exhibitors at this event.

## REQUIREMENTS: WHAT YOU NEED TO DO

Your company can be authorized as a CSP on Luminate Online, Luminate CRM and/or Common Ground. Common Ground authorization includes CRM, Online and Social Fundraising, while Luminate authorization is separate for Luminate Online and CRM.

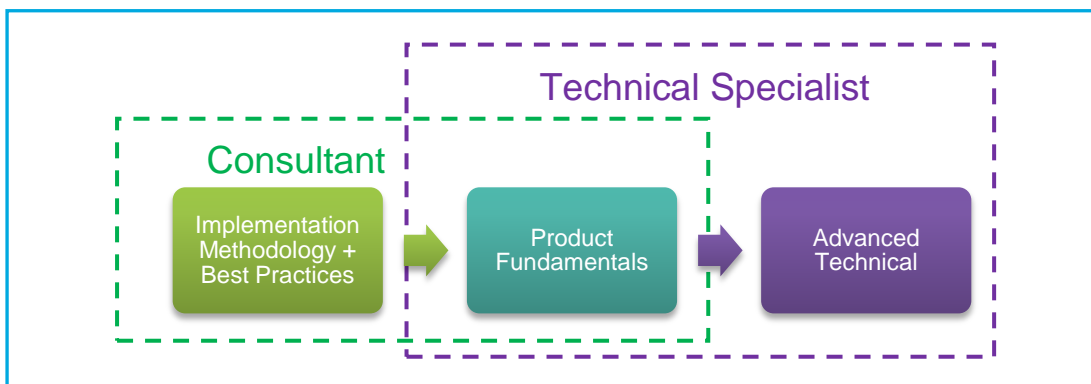


Convio Products and CSP Authorizations

To be a CSP you start by having authorized individuals on staff. The CSP authorization cannot be held by an individual that is not a part of a firm since CSP is a firm level authorization. There are two types of authorizations for individuals at your firm:

**Consultant** — Consultants are trained on Convio implementation methodology, best practices, and product fundamentals. These individuals are *not* trained to perform the implementation tasks for Convio products. This training track is recommended for members of your team serving in the role of Project Manager, Business Analyst or Strategy Consultant.

**Technical Specialist** — Technical Specialists are trained on product fundamentals and on the advanced technical skills needed to implement Convio software and provide related post-deployment services. This training track is recommended for the members of your team serving in the role of Web Developer or Technical lead.



Training segments for Consultants and Technical Specialists

To be a CSP, you *must* have at least one (1) full-time Consultant and at least one (1) full-time Technical Specialist on staff. (This may be one person with both authorization levels.) This ensures that you have the expertise on staff to deploy Convio products with a consistently high level of quality. If a CSP employs or contracts an individual to work on a project that involves a Convio product, the individual working on the project must be authorized as a Technical Specialist or Consultant (or both) for the product on which they are working.

### **Ongoing Maintenance of your Authorization**

As you add new staff members who will be working on Convio projects, we will require them to go through training and become authorized. We will grant them access to materials for self-study, and they can sign up for upcoming training webinars and take the exam when they are ready.

CSPs are required to keep up to date with each product release for the product on which they are authorized in order to maintain your authorization. Convio holds regular partner webinars makes available additional online training that includes process and product updates. Convio reserves the right to remove from program if CSPs do not keep up with maintenance training as long as materials were made available.

If your Consultant or Technical Specialist leaves your company such that you are no longer in compliance, we'll give you a ninety (90) day grace period to have another individual from your organization authorized as a replacement. The grace period is intended to give you time to have another individual authorized without losing your CSP benefits; however, you may lose the authorization to deploy Convio products until you have both a Consultant and a Technical Specialist back on staff.

Individual is authorized only under the firm under which the individual was employed or contracted when the individual became authorized. If an authorized individual leaves the firm under which he gained authorization, the individual must re-authorize under the new firm and firm must also meet requirements to be a CSP in order for Convio to recognize the firm as a CSP.

If your firm has individual on staff that was previously authorized at another firm, the firm must go through all CSP requirements to become designated as a CSP.

## Evaluation Criteria

We all want for the CSP program to remain a valuable program for all members *and* our clients. So, Convio will periodically evaluate strength indicators for each partner. These indicators may influence your priority status for the allocation of product implementation business and/ or continuation as a CSP:

- Score on client satisfaction surveys
- Volume and value of client projects
- Breadth of services offered by the CSP
- Track record for keeping up product releases and new CSP processes through ongoing product and implementation training
- Feedback from Convio staff on how the CSP is performing
- Ability to market & grow their business with Convio

Common Ground CSPs which were recognized as a CSP before July 22, 2011 will be required to re-authorize in 2011 due to significant changes in the product made since Common Ground version 2.5, when the authorization was last available. The products which the old Common Ground authorization translates to are Common Ground and Luminare CRM. A grace period for re-authorization will be set by Convio to allow the Common Ground CSPs time to take the training and re-authorize.

## Convio Luminare Online

### Training

Authorization is based on passing a test for the level of authorization (Consultant or Technical Specialist) sought. Convio offers online and classroom training to prepare for the examination.

We've separated training into the following product areas. Your Consultant and Technical Specialist must pass the test for each product area for authorization.

1. Luminare Online (*prerequisite for below; includes, Email Marketing, PageBuilder, Fundraising (Donations), Calendar Events, eCommerce, Reporting, and Convio Management System (CMS)*)
2. Luminare Online TeamRaiser™
3. Luminare Online Advocacy

### Luminare Online

Training for Luminare Online is offered as online instructor-led and online recorded training. In-person classroom instruction can be arranged with Convio directly. Training for the Consultant authorization examination consists of product training and implementation methodology. Training for the Technical Specialist examination consists of product training and advanced technical training.

### Additional Modules

Training for additional Luminare Online modules (such as TeamRaiser) will be made available as training materials are developed.

### Fees

To participate in the CSP program for Luminare Online, your company will need to pay training and/or testing fees. In addition, your company must pay an annual Partner Program fee to cover the costs associated with the program including Support, marketing resources, ongoing training and access to resources. Current fees will be set forth in your CSP agreement with Convio.

A few important notes about fees:

- Training fees will allow one individual the ability to take training courses for any of the following product areas as they become available during the contract period: Convio Luminare Online, Convio TeamRaiser, Convio Advocacy.
- Consultants and Technical Specialists must re-test each year to maintain authorization. There is not a fee for re-testing year over year. Training in second and subsequent contract periods may include additional areas of competency.
- Individuals may wish to bypass training to gain initial CSP authorization; however, there is still a fee to take the test alone without taking training.

## Common Ground and Luminate CRM

The cornerstone of CSP authorization for both Common Ground and Luminate CRM is authorization on Salesforce.com. We require that your company is a Salesforce Registered Consulting Partner<sup>2</sup> with Implementation Consultant Certification or Developer Certification. *At a minimum*, your company must attain the Salesforce Advanced Administrator Certification<sup>3</sup>.

### Training

We require that your company take training specific to Common Ground or Luminate CRM– available via online self-study and webinars – and pass a test for the level of authorization (Consultant or Technical Specialist) sought. Training for the Consultant authorization examination consists of product training and implementation methodology. Training for the Technical Specialist examination consists of product training and advanced technical training.

### Fees

There are no initial training and testing fees to participate as a CSP for Common Ground or Luminate CRM due to the cost of Salesforce.com training and authorization. The fees that Salesforce.com charges for these classes and tests are controlled by Salesforce.com – Convio cannot negotiate for you, however, Salesforce.com does offer a discount for companies working with nonprofit organizations. Please contact Salesforce.com for details about their fees.

Your company must pay an annual fee to cover the costs associated with the CSP program including Support, marketing resources, ongoing training, and access to resources. Current fees will be set forth in your CSP agreement with Convio.

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<sup>2</sup> See [http://sites.force.com/partners/PP2Page?p=P\\_ConsultingPartnerProgram](http://sites.force.com/partners/PP2Page?p=P_ConsultingPartnerProgram) for details.

<sup>3</sup> See [www.salesforce.com/services-training/training\\_certification/certification/](http://www.salesforce.com/services-training/training_certification/certification/) for details.

## PROCESS: HOW TO BECOME A CONVIO SOLUTION PROVIDER

*Let's get moving.* After you review this guide, contact us at 888-528-9501, ext 1 or visit [www.convio.com/partners](http://www.convio.com/partners) and fill out the Partner Inquiry Form.

If your company qualifies, our team will contact you to go through orientation. We'll also send you a listing of upcoming available trainings so that you can get your team on board. Below is a checklist for you to follow as you go through the process:

### Checklist for CSP Authorization

1. Fill out the Partner Inquiry Form at [www.convio.com/partners](http://www.convio.com/partners) to schedule an introductory conversation about the CSP Program. Convio will contact you to discuss the CSP program and if there is an appropriate fit with your firm.
2. Sign a Convio Non-disclosure agreement.
3. Get access to the Convio Partner Community and LearnCenter.
4. Get access to sandbox of the product on which you are gaining authorization.
5. For Common Ground or Luminate CRM: Confirm that your company is a Salesforce Registered Consulting Partner with Implementation Consultant Certification or Developer Certification. At a minimum, your company must have Advanced Administrator Certification.
6. Provide three references that demonstrate capability to:
  - For Common Ground and Luminate CRM:
    - a. Convert an existing database to a Salesforce.com platform;
    - b. Provide business process consulting to help a nonprofit develop CRM procedures that align to their processes;
    - c. Deliver customizations to spec for a CRM implementation.
  - For Luminate Online:
    - a. Provide consulting and implementation services to help a nonprofit develop an online presence with strategy that aligns to their processes
    - b. Understanding of online projects, and sample SOWs and project plans.
    - c. Technical ability to create and maintain a website.
7. Attend CSP Training for Consultant or Technical Specialist (or both if obtaining both authorizations) – scheduled web sessions or self-guided training.
8. Each staff member wishing to become authorized will need to request to take the Authorization test for Consultant or Technical Specialist (or a combined test).
9. After passing Authorization Test, Convio will send your firm the Convio Solution Provider Agreement, which you will sign and return. If you are also interested in gaining a referral fee for business you bring to Convio, you will execute the Referral agreement at the same time.