

CONVIO SOLUTION PROVIDER Training Syllabus

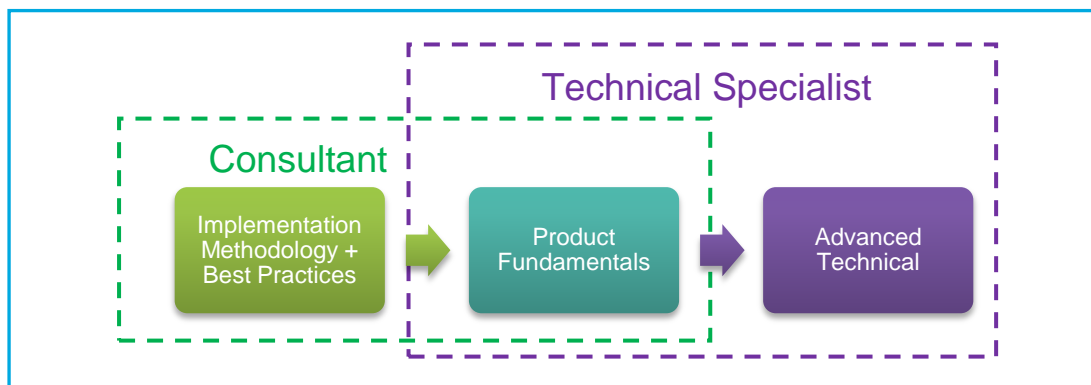
AUTHORIZED

OVERVIEW: CONVIO SOLUTION PROVIDER TRAINING

To be a CSP you start by having authorized individuals on staff. 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.) 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.

TRAINING DELIVERY METHOD

All CSP training is available online, on-demand in our Partner Learn Center. It is a self-paced training but does have timed exams. If you have an in-person training need, we can discuss your options.

CONVIO LUMINATE ONLINE TRAINING SYLLABUS

Luminate Online Product Fundamentals	Approximate Length*
Online Basics for CSPs	2.25 hours
Constituent 360	60 minutes
WYSIWYG	45 minutes
Library	15 minutes
Security Categories	15 minutes
Online Fundraising & eCommerce	3.5 hours
Donations I	60 minutes
Donations II	60 minutes
eCommerce	90 minutes
Online eCards and Email	3.25 hours
Stationery	15 minutes
eCards	30 minutes
Email I	1.75 hours
Email II	30 minutes
Email Express	15 minutes
Online PageBuilder & StoryBuilder	1.25 hours
PageBuilder	45 minutes
StoryBuilder	30 minutes
Online Calendar Events & Survey	1.75 hours
Calendar Events	60 minutes
Surveys	45 minutes
Online Data Management & Report Writer	1.25 hours
Data Management	30 minutes
Report Writer	45 minutes
CMS	5 hours
Content Authoring	2 hours
Content Management	3 hours
Product Fundamentals Exam	2.5 hours
APPROXIMATE TOTAL FOR COURSES AND EXAM	21 HOURS

Authorization Track Courses	Consultant	Technical Specialist	Approximate Length
Implementation Methodology	•		30 minutes
Enabling Merchant Accounts	•		15 minutes
Managing CMS Projects	•		30 minutes
CMS Template Syntax		•	30 minutes
Page Wrapper Editor		•	30 minutes
CMS Wrappers		•	15 minutes
Technical Configuration		•	75 minutes
Architecture Overview & Best Practices		•	30 minutes
Consultant Exam	•		1.5 hours
Technical Specialist Exam		•	2 hours
TOTAL FOR COURSES AND EXAM	3 HOURS	5 HOURS	

* The length is approximate and the estimated amount of time that it takes an individual to go through the tutorial and comprehend the information. This amount of time may vary for each individual.

CONVIO LUMINATE CRM TRAINING SYLLABUS

Luminate CRM Product Fundamentals	Approximate Length*
CRM Basics	60 minutes
CRM Administration	45 minutes
CRM Gift Management	45 minutes
CRM Event Management	45 minutes
CRM Volunteer Management	30 minutes
CRM Grant Management	30 minutes
CRM Reporting, Campaign Management & Segmentation	45 minutes
Online Essentials for Luminate CRM CSPs	90 minutes
Constituent 360	
Query & Source Codes	
Luminate Data Integration	60 minutes
Product Exam	1 hour
APPROXIMATE TOTAL FOR COURSES AND EXAM	9 HOURS

Authorization Courses	Consultant	Technical Specialist	Approximate Length
Implementation Methodology	•		30 minutes
Salesforce Installs and Transfers	•	•	45 minutes
Data Migration Planning	•	•	30 minutes
Data Migration Importing		•	45 minutes
Installing on an Existing Salesforce Instance		•	30 minutes
Consultant Exam	•		60 minutes
Technical Specialist Exam		•	60 minutes
Combined Exam	•	•	90 minutes
TOTAL FOR COURSES AND EXAM**	3 HOURS	3.5 HOURS	

* The length is approximate and the estimated amount of time that it takes an individual to go through the tutorial and comprehend the information. This amount of time may vary for each individual. **Combined exam is 90 minutes, so will add ½ hour.

CONVIO LUMINATE TEAMRAISER TRAINING SYLLABUS

In order for a firm to become authorized on TeamRaiser, the firm first must obtain their CSP Authorization for Luminate Online. In addition, individuals that wish to pursue authorization must already be authorized on Luminate Online. The Online authorization contains core fundamentals about the Luminate solution that are required as a basis for understanding before proceeding to the TeamRaiser-specific curriculum.

The training curriculum encompasses Product Fundamentals, Advanced Configuration Topics and Implementation & Scoping. Unlike other CSP curriculums, there is no differentiation in the requirements for Consultant and Technical Specialists.

Luminate Product Fundamentals and Authorization Track Courses	Approximate Length
TeamRaiser Configuration	105 minutes
TeamRaiser Management	75 minutes
Ecommerce Shopping Cart	30 minutes
Event Management Center	15 minutes
Event Blueprints	15 minutes
Participant Centers	15 minutes
Uploads	15 minutes
Advanced Event Options	50 minutes
Advanced Configuration	120 minutes
Custom Pages	
Navigation Bar	
TeamRaiser Wrapper and Styles	
TeamRaiser Banner	
Returning Teams	
National, Regional and Local Companies	
Social Media	
Implementation & Scoping	20 minutes
Authorization Exam	60 minutes
APPROXIMATE TOTAL FOR COURSES AND EXAM	9 HOURS

ONGOING MAINTENANCE: ALL AUTHORIZATIONS

CSPs are required to keep up to date with each product release for the product on which they are authorized and possibly other information related to Convio or the CSP Program in order to maintain your authorization. After you complete your Authorization training and are an authorized CSP, your authorized team members will be assigned to a maintenance track in the Partner Learn Center. As training is added to this track, Convio will notify your authorized team members and they can take at their own pace. At the time of renewal of your CSP Agreement, Convio will verify that your authorized individuals have completed all maintenance training.

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 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 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 Partner Community and LearnCenter.
4. Get access to sandbox of the product on which you are gaining authorization.
5. For Luminate CRM: Confirm that your company is a Salesforce Cloud Alliance Consulting Partner with Service Cloud Consultant Certification and Advanced Administrator or Developer Certification.
6. Provide three references that demonstrate capability to:
 - For 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 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 can execute the Referral agreement at the same time.