

## Convio Common Ground™

### Sneak Peek Demo — Question and Answer Session

#### **Q: How is this CRM different from the existing Convio CRM or GetActive CRM?**

Convio's current product suite or "eCRM" refers to our online marketing applications, which support a 360 degree view of an individual's *online* interactions and relationship with an organization. Convio Common Ground™ CRM is a true constituent relationship management (CRM) product, or more of what is traditionally known as a "database of record" for an organization. It typically tracks offline marketing and other interactions, and is tightly integrated with our online tools.

#### **Q: How does this integrate with Convio's online fundraising and email marketing campaigns?**

All gifts captured online are automatically added to the donor's transaction history in Common Ground and associated with a pre-established campaign. No donations will be added to Common Ground until a campaign cross-reference has been established and the donor's profile record is determined unique. In other words, if there is a chance the user record is a duplicate, Convio will withhold the profile and associated transactions from the synchronization until an administrator has reviewed and resolved the potential duplicate.

Each email message sent via Convio's Email Marketing product is associated with a campaign in both systems. So, for each constituent in Common Ground a campaign listing will be associated with his or her record with an appropriate status indication (e.g. "sent" or "responded").

#### **Q: How integrated is MS Outlook with Common Ground? Does an email you compose in Outlook get attached to the record in Common Ground and vice versa?**

Yes. The MS Outlook integration is meant to help track 1:1 correspondence between your staff and individuals. You can learn more about how this plug-in works by visiting this url:

<http://www.salesforce.com/products/sales-force-automation/desktop-mobile/ms-outlook-edition.jsp>

In addition, it's important to share that emails can be tracked not only with individuals but specific interactions. For instance, a donation transaction can have an email exchange thread associated. Since the donation is related to the constituent, all correspondence is "rolled up" to the individual, but this allows you to have a greater context in tracking the conversation history.

#### **Q: How does this system work for membership organizations? We have organization members who have multiple employees receiving multiple benefits.**

All contacts, constituents, members, volunteers, etc. can be stored in Common Ground, allowing your organization to track various interactions, relationships and transactions to their record. However, Common Ground v1.0 will not support complex membership and dues features often found in membership/association management products. This is an important area that will be addressed in our roadmap.

If your organization has complex membership requirements, Common Ground v1.0 "out of the box" will likely not meet your needs. However, with the open platform and incredible flexibility of the product, it is possible for your organization to develop member management features to complement the v1.0 product if you so choose — just be aware that Convio will be developing this feature set in a future

release as well, so your organization will need to make the decision as to whether to purchase v1.0 and use "as is", supplement with customizations, or wait for the future version.

### **Q: How is this different than using Salesforce directly, along with Convio's eCRM?**

Much different. The core Salesforce CRM product features, terminology, user interface and support resources are not designed to serve the needs of nonprofits. The Nonprofit Template provided by salesforce.com offers many customizations to help; however, it still lacks many important features organizations need to manage constituents, relationships and donations. Here is a brief sample of features that are not supported in the Nonprofit Template but are standard in Common Ground:

- Householding tools to share address records and aggregate giving summaries
- Soft-credit features to share donation credits between individuals
- Batch gift transaction entry
- Pledge gift tools for tracking installments and conducting revenue forecasting
- LYBUNT and SYBUNT reporting tools

Additionally, the value of purchasing Common Ground goes well beyond features. With Convio as a partner, organizations have unlimited, dedicated support, up-to-date training materials, tutorials and frequent peer training opportunities. You also have the added assurance of a dedicated team of product managers, engineers and quality assurance staff with the sole responsibility of enhancing the Convio product to meet the needs of nonprofits.

### **Q: Does Common Ground allow accessing by the constituent to update their records on a limited basis?**

Yes. For organizations also using Convio's online marketing products there are a variety of subscription and profile management features. For organization's who choose not to use Convio's online marketing products, other options are also available natively within the product. Some customization is required, but it is possible to expose limited information about constituents via the web and offer them the ability to make basic changes.

### **Q: Could you please clarify the offline gift processing / credit card capabilities? Did you say it won't be available in version 1? Is there a version available that CC processing works in?**

Common Ground provides the features to store all gifts received; however, v1.0 will not offer a credit card processing feature to actually charge the donor's card and return authorization. For organizations also using Convio's fundraising products this is not an issue; however, it is our intention to enhance Common Ground with features to securely charge a donor's credit card or electronic check from directly within the product in a future release.

### **Q: We have an 80 user Salesforce instance, but only 5 staff in Development, how does the pricing work in that situation?**

This is a good question since many organizations have multiple constituent types with various departments involved in tracking interactions and relationships. Common Ground supports this fully, without significant cost. Common Ground can be optionally used by only staff members who need to use the product, all core contact management functions remain available to non-Common Ground user staff members. For instance, "core" CRM functions include but are not limited to: modifying standard constituent profile fields, tracking correspondence and campaign participation and viewing prior standard giving history (excluding pledges, recurring gifts, tributes and others).

As an organizational example, your development team of 5 would likely require Common Ground user licenses; however, most other staff would continue to manage constituents without the need to purchase Common Ground and be satisfied knowing they are able to view all constituents and some associated transactions but not all.

**Q: How much would a Convio website integrated with Common Ground cost for a 10-user staff?**

Convio's website management products are used by both large and small organizations that have diverse needs. Selecting the right tool and implementation plan requires in-depth knowledge of each organization's needs; therefore, please contact our sales staff by calling (888) 528-9501 x1 or emailing us at [commonground@convio.com](mailto:commonground@convio.com) to request a meeting.

**Q: Is it possible to segment donors based on offline activity, such as tracking what kind of mailing prompted a donation?**

Common Ground gift management provides robust support for tracking the source of any gifts. This tracking enables organizations to segment their database based upon the source of the gift and the motivation of the gift, for example the 2008 Annual Campaign Spring Mailing.

**Q: Can Common Ground be used to track donor recognition?**

Yes, however we should probably further discuss what is meant by recognition. If your organization needs to provide donation receipt letters for tax purposes and/or automated email messages, then Common Ground is able to support these needs. If you are referring to a web-based recognition tool, like a "top donor scorecard or honor roll" service, then additional services provided by Convio would be required.

**Q: Do you allow for running a batch of offline gifts as a merge for creating thank you letters?**

Yes. Using either Microsoft Integration tools or a third-party product (CongaMerge) it is possible to merge thank you letters in bulk after completing a gift-entry batch.

**Q: Will you, at some point, provide a test/scratch login for us to truly test drive Common Ground?**

Yes! With the launch of Common Ground, individuals will have the ability to register for a full-featured version of the product from our website <http://www.convio.com/crm>

**Q: If Salesforce updates their product does Common Ground get the new features automatically?**

Yes. All new features extended to the Salesforce CRM are automatically made available to Common Ground clients. This dual-vendor innovation is yet another strength of Common Ground. With salesforce.com continually improving the core CRM product, Convio is able to focus on developing the best suite of nonprofit specific features to complement.

**Q: Will you now be willing to work with non-American clients?**

At this time we are not able to serve the multi-lingual, multi-currency, multi-locales requirements for international organizations.

**Q: Are any features provided for event management?**

With the v1.0 release of Common Ground we will not be providing event management features. This is a feature set we have placed as a high-priority on our roadmap and will be sharing the roadmap at launch so that organizations can determine when best to purchase Common Ground.

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**Q: Does common ground require the purchase and use of Convio modules or is it a single sole source solution?**

Common Ground is offered without the need to purchase Convio's online marketing products. For organizations that do purchase both offerings we've created an automated integration that we'd be excited to share with your team.

**Q: When will you be sharing the roadmap you mentioned for future features? And do you expect the fees to increase as new features are added?**

We will be sharing the roadmap with the launch of v1.0 and we have no plans to increase the fees or charge for any additional features.

**Q: Does your batch entry module support scanning and OCR of a large amount of gifts (>4000)?**

The v1.0 release and batch-entry features do not support the importing of scanned transactions.

**Q: Can you do reporting for mailings, for example can I create a report that shows me everyone who has donated in the last two years over \$50?**

Yes. The pre-built reports will support the ability to identify donors by time period and amount. Additionally, the custom report wizard is easy for administrators to narrow results for specific mailings or filter based on period-based (e.g. lifetime, YTD, prior year, etc.) criteria.