Constituent360

Constituent360™ is an online database for the creation and ongoing management of a Convio-powered Web site's interest, security and constituent categories. It includes tools for creating an online constituent registration form that can appear on any Web site page. When a Web site visitor registers, an individual record is automatically created in the constituent database. Constituent360 can be used to search for, view or download registration information for any registered constituents.

In addition, Constituent360 records all online interactions, including donations, event participation, email click-throughs and more. Constituent360 also includes tools for finding and combining duplicate records as well as building queries to identify distinct groups for targeted communication or analysis. As online interaction increases, Constituent360 stores large amounts of data, such as online donations, action alert and survey responses, event commitments, and site behavior like popular pages and links. Constituent360 Advanced Reporting, with tools for analyzing complex data and comparing campaign results, unlocks hidden patterns of behavior in this wealth of data, giving you the information to fine-tune marketing, fundraising and advocacy campaigns for the best possible results.

Constituent marketing database

- 110 definable fields for capturing information about constituents, including:
  - 50 fields for Boolean operators (true/false, yes/no, etc.)
  - 30 fields for alphanumeric/text strings
  - 10 fields each for monetary fields, dates, or numbers
- History of all transactions and summary gift information by constituent (Convio Fundraising only).
- Online interactions automatically recorded for each constituent, including:
  - Sent emails (all solutions except Web Site Content Management)
  - Link click-throughs
  - Web site visits (all solutions except Email Marketing)
  - Online transactions (Convio Fundraising and TeamRaiser only)
  - Action alert responses (Convio Advocacy only)
  - Submitted surveys (all solutions)
  - Tell-a-friend messages sent
- Filter and view interaction history for each constituent.
- Ability to manually unsubscribe email recipients (all solutions except Web Site Content Management).
- Search for any constituent.
- Create constituent records (single or batch).
- Secure administrative accounts.
- Enable "offline" members making their first visit to the site to identify themselves with personal data and receive immediate access to preexisting account.
- Standard administrative permissions can be given to each administrator, including:
  - Site Administration (access to all modules)
  - Content Creation
  - Content Publishing
  - Campaign Management
  - Read only access to Contact Data
  - Update Access to Contact Data
  - Full Access to Contact Data
  - No Access to Contact Data
- Administrators can add private notes to contact records, with options to make visible only to other trusted administrators or only to the person who entered it.

Segmenting constituents into groups and categories

- Create an unlimited number of interest categories to organize content for dynamic presentation to constituents. Specify the hierarchy, name and description.
- Create groups for targeted marketing to constituents.

- Automated, dynamic groups for interest segmentation.
- Restrict administrative access to Web content, email, and constituent data through use of User Security Groups.
- Query facilities to:
  o Query on all available fields in the constituent profile, including custom fields
  o Query on groups, including all automatic groups
  o Use query results to create a static group or a dynamic group that updates automatically on a specified schedule
  o Use query results to send an email (all solutions except Web Site Content Management)

Custom data management

- Customization of constituent profile with choice of more than 150 fields.
- More than 70 custom fields, including date, number, text and yes/no types.
- Specify placement of custom fields in constituent profile.
- Designate any field, including custom fields, to show up in a highlighted section.

Data import/export

- Standard comma separated value (.csv) constituent import and export facility
- User report to view or export registered constituents by group (downloadable as .csv file)
- Download a custom report, mail merge or phone list as a .csv file for use with other databases and applications such as Microsoft Word®.

Data de-duplication

- Background detection of potential duplicates based upon specified criteria including name, email, and/or address.
- Duplicate resolution facility to compare duplicate records and selectively merge all or parts of the records.

Reports

- Drill-down reporting to analyze complex data and view it from different perspectives. Specify date range, campaigns, analysis dimensions, chart type (pie or bar) and more. Drill-down by source, giving history, activism history, geography and more. Drill-down reports include:
  o Campaign Analysis Report
  o Advocacy Analysis Report
  o Interaction Analysis Report
  o Email Analysis Report
- Time-series reports to analyze progress over time and correlate events (e.g. email sent) against progress. Specify date range, campaigns, metrics to report on and reporting increment. Drill down on specific dates or data points for detailed lists of transactions and interactions. Scroll over dates to view information about online events (e.g., email sent, ticketed event). Time-series reports include:
  o Campaign Timeline Report
  o Advocacy Timeline Report
  o Interaction Timeline Report
  o Email Timeline Report

CONVIO®