

LEGEND



ESSENTIALS

Ever ask yourself, "How'd they do that?" when you see a great nonprofit website, fundraising appeal or online campaign? Hear Convio product how-to's, best practices and real-life examples for maximizing results.



ADVANCED

Are you pushing the envelope when it comes to your Convio product use and are you eager for more? If you dream about custom apps, S-tags and website conversions, then these sessions are for you.



GLOBAL

Interested in discussing the hottest trends and the latest issues affecting the nonprofit sector? Join these sessions to hear about a wide range of topics presented by industry experts and leading technologists.



BRING YOUR OWN LAPTOP

Ever wish you could just "do" during a session instead of just "take notes?" Well, look for the BYOL icon (Bring Your Own Laptop)! It's an option we're adding for some workshops. Bring your laptop, roll up your sleeves and get ready to actually get that campaign, email, a-thon event rolling. All attendees are welcome sans laptop, too.

MONDAY

- 11:15am
- Convio Luminate Online – Troubleshooting & Tips

- 2:00pm
- Should I Stay or Should I Go? – Making Strategic CRM Software Decisions

- 3:45pm
- Tales from the Training Room: Stories, Tips & Resources to Get You to the Top

TUESDAY

- 1:15pm
- Email Optimization Workshop
 - Creating a Custom TeamRaiser Registration Flow on the Open API

TUESDAY (CONTINUED)

- 2:45pm
- TeamRaiser Workshop: Configure, Customize & Implement Participant Center 2

WEDNESDAY

- 9:00am
- Power to the Platform: Customizing Convio Luminate
- 1:00pm
- Homepage Design Slam - Taking it Mobile
 - Save Time, Learn More, Do More: Free Kit Workshop



CFRE CREDIT

The sessions listed below are pre-approved for continuing education points. Pick up a point tracking sheet from the conference registration desk to verify your participation.

Credit-approved sessions are also indicated throughout this guide with the CFRE logo icon.

MONDAY

11:15am

- Multi-Channel Campaigns: The Next Generation
- Creating an "Olympic" Email Strategy Based on Constituent Input & Market Research
- Mobile Advocacy: Smart Solutions to Build Communities, Attract Donors & Engage Constituents
- Scan ME! Engaging Constituents with QR Codes

2:00pm

- Personal, Professional or Both
- Swimming in the (Multi) Channel: An Effective Approach to Online/Offline Fundraising
- Storytelling: What's Your Narrative?

3:45pm

- Advocacy 2012: Building Advocacy Success on the Election Cycle
- More than Just An Email: Segmenting Messages, Customizing Content & Delivering Results
- Tools to Go Beyond the Choir
- Your Integrated Marketing Campaign – How More IS Better

TUESDAY

9:30am

- Killer Content: Making Your Marketing Social
- The Holy Grail Checklist: Planning a Powerful Multi-Channel Campaign

TUESDAY (CONTINUED)

11:00am

- Engagement at its Core: Creative Email Audience Segmentation
- Get a Move On! The New Era of Moves Management & Major Gift Fundraising
- Mobile: Where to Start?

1:15pm

- Email Optimization Workshop

2:45pm

- The Golden Rules of Good Stewardship: Two Words + Three Steps for Better Donor Relations
- Your Data is Talking... Are You Listening?
- Managing Enthusiasm for Innovation

WEDNESDAY

9:00am

- All Roads (Should) Point to Sustainers
- Change Management: Turning Technology Evolution into a Revolution!

10:30am

- Social Media Masters & Gorgeously Groomed Grassroots: How Citizens Get Their Message Heard on Capitol Hill in the Internet Age
- What do They Really Like? Social Media Lessons from the Mouths of Generations of Donors

1:00pm

- Activists Don't Like Silos: How to Apply a Multi-Channel Approach to Converting Them to Donors

11:15 AM

COMMON GROUND ADMINISTRATION WITHOUT TEARS: TIPS & TRICKS FROM THE TRENCHES

Monday, 11:15am – 12:30pm
Harborside Salon E
Evaluation Code: 1020

Managing Convio Common Ground can seem like a daunting task. What are the best techniques to keep your Common Ground data clean? How do you empower your users to be confident while using Common Ground? With 3 updates to Salesforce and 2-3 updates to Common Ground a year, how do you keep up to date on all the changes? What are the best utilities for nonprofits to use with Common Ground? In this practical demo-driven session, you'll learn from a fellow Common Ground administrator about all the insider secrets your implementation consultant forgot to tell you.

Learning Outcomes: Simple tips and tricks to effectively administer Common Ground on the Force.com platform, Learn where to go for support and resources outside of Convio, Easy ways to share Salesforce/Common Ground knowledge with other users in your organization.

Speaker: Judi Sohn, Vice President of Operations, Fight Colorectal Cancer

Topics: Common Ground

Product: Common Ground

MULTI-CHANNEL CAMPAIGNS: THE NEXT GENERATION

Monday, 11:15am – 12:30pm
Harborside Salon B
Evaluation Code: 1036

Looking to maximize the value of your online recruits? Ready to move beyond just sticking your online donors in the mail? This session will dive into the next generation of case studies including looking at: 1. Multi-channel on-boarding (i.e., "welcome") streams for converting new supporters to donors or sustainers; 2. Sophisticated, integrated campaigns leveraging both behavioral and demographic data for segmentation and

messaging; and 3. Cutting edge techniques for acquiring emails and mobile numbers as part of a multi-channel approach. Case studies will come from leading nonprofits including the Human Rights Campaign and Oceana.

Learning Outcomes: Great ideas for multi-channel on-boarding streams to maximize the value of new online recruits, Segmentation techniques for multi-channel campaigns using behavioral and demographic data, How to integrate mobile and social media along with email, mail and telemarketing.

Speakers: Jeff Regen, Senior Vice President Integrated Services, M+R Strategic Services; Adam Scruggs, Associate Director, Data Acquisition & Analysis, Human Rights Campaign

Topics: Multi-channel Marketing & Fundraising

WHAT'S THE BUZZ ALL ABOUT? INTRODUCING CONVIO LUMINATE™

Monday, 11:15am – 12:30pm
Harborside Salon D
Evaluation Code: 1082

Now that Convio Luminate is here, we know everyone is curious to learn about how this will revolutionize your Constituent Engagement strategy. This interactive session will cover what Convio Luminate is, why we decided to build it and where we are going. As a companion to this session, there are several "Convio Luminate Roadmap Breakout Sessions" (see schedule) where clients can participate in more detailed discussions with Convio Product Management and other clients.

Learning Outcomes: What is Convio Luminate, How and why we built it, Where it's going

Speakers: Casey Flinn, Product Strategy Manager, Convio; Molly Brooksbank, Product Marketing Manager, Convio

Topics: Convio Technology: Best Kept Secrets and Applications of Open

Product: Convio Luminate

CONVIO LUMINATE™ ONLINE – TROUBLESHOOTING & TIPS

Monday, 11:15am – 12:30pm
Essex
Evaluation Code: 1103

Come meet our Convio Cares Team and learn from the experts. Join an interactive session full of frequently answered questions and Convio Luminate insight. Pick the brains of the knowledgeable and bring the how-to's you've been wondering about.

Speakers: John Miller, Support Analyst, Convio; Jonathan Culling, Sr. Client Support Analyst, Convio

Topics: Convio Technology: Best Kept Secrets and Applications of Open

Product: Convio Luminate

CREATING AN "OLYMPIC" EMAIL STRATEGY BASED ON CONSTITUENT INPUT & MARKET RESEARCH

Monday, 11:15am – 12:30pm
Harborside Salon A
Evaluation Code: 1118

Relevancy is GOLD! We've heard it from our constituents, seen it through our market research and pursued it in our marketing strategies. Join Merkle and the United States Olympic Committee to learn how they combined findings from the *View from the Nonprofit Inbox* study with their market approach to create a strategic, relevant and forward-looking email program. You'll get tips around creating your value proposition across digital channels, how to listen to your constituents and evolve your email messaging as well as how to integrate internally across your organization to achieve a truly relevant program. Don't miss this one-of-a-kind session.

Learning Outcomes: How to find out what content is relevant to the people reading your organization's email, How to optimize Convio's Email Marketing tools to allow constituents to tell you where they are and what interests them so your nonprofit can provide relevant email content, How to listen to your constituents through email and social media channels, learn from and facilitate a two-way conversation online with them.

Speakers: Bethany Bauman, Senior Director, Digital Strategy, Merkle Inc.; Jeffery Hunt, Director, Annual Fund, U.S. Olympic Committee

Topics: Multi-channel Marketing & Fundraising

Product: Email Marketing

MOBILE ADVOCACY: SMART SOLUTIONS TO BUILD COMMUNITIES, ATTRACT DONORS & ENGAGE CONSTITUENTS

Monday, 11:15am – 12:30pm
Kent
Evaluation Code: 1154

Does your organization need to get smart(er) on Mobile Advocacy? If so, you're attending the right session. This session seeks to expose a new, fresh approach to donor engagement through smart mobile technology. We'll review tips and best practices for deploying local or national advocacy events using targeted smartphone technology within a common (not templated) framework. In addition, we'll address the growing needs for organizations to seamlessly gather and process real-time mobile data (location, actions and usage stats) to continuously segment your mobile database, delivering only timely, targeted and the most relevant messages to users. By using the Convio Advocacy API, organizations can engage users on cross-platform web and mobile solutions to take action, volunteer and engage legislators while supporting your cause on-the-go. In addition, we will attempt to demystify the rapidly evolving mobile technology landscape and provide real-world recommendations, insider tips and best practices for choosing the right technology, the right solution and the right mobile partner. We will also review organizations with successful implementations to learn what is possible and how best to get started. Most importantly, we will learn what it takes to build active mobile advocacy networks using your supporters' most personal device – their smartphone.

Learning Outcomes: Step-by-step plan to launching a Mobile Advocacy solution, Case studies of proven implementation, Metrics, metrics, metrics (Let's be honest, the best slides are those from Excel – right!)

Speaker: Jeff Pfaff, CEO, MTB Mobile

Topics: Convio Technology: Best Kept Secrets and Applications of Open

Product: Advocacy

SCAN ME! ENGAGING CONSTITUENTS WITH QR CODES



Monday, 11:15am – 12:30pm
Harborside Salon C
Evaluation Code: 1162

QR codes are all the rage today in the for-profit world. However, nonprofits are just now starting to ask how they can use them to further their mission and goals. During this session we will explore what a QR code is and what it is not and how you leverage them in your marketing. We will also explore who in your constituent and prospect pools are most likely to be receptive to them. Using real world examples you will also learn how to create QR codes and track their success.

Learning Outcomes: Learn what a QR code is, How they are being used in the nonprofit sector; How to implement them for your organization.

Speaker: Brad Duff-Hudkins, Senior Consultant, Convio

Topics: Integrated Marketing/Constituent Experience

⌚ 2:00 PM

IMPROVING YOUR TEAMRAISER EVENT WITH FACEBOOK LOGIN



Monday, 2:00pm – 3:15pm
Harborside Salon D
Evaluation Code: 1006

Find out how through using Gigya, returning registrants can log into your TeamRaiser event by using their Facebook login rather than having to remember their username and password from a previous event.

Learning Outcomes: Understand steps to take to enable Gigya, Understand how it improves the experience for returning registrants, Examples of clients that are using this functionality.

Speaker: Joey Martin, Services Engineer, Convio

Topics: Convio Technology: Best Kept Secrets & Applications of Open

Product: TeamRaiser

ELEVATE

GOOGLE ANALYTICS & CONVIO: BETTER TOGETHER



Monday, 2:00pm – 3:15pm
Harborside Salon E
Evaluation Code: 1088

Google Analytics knows your web visitors, where they come from and what they're looking for. Convio knows your real supporters, who donates the most and who will take action for you every time. Separately, they are strong, but when you bring their data together, they become more powerful than ever. We'll show you the best ways to make Google Analytics work with Convio, from tracking users across domains, to getting real donation values right in your analytics. We'll even go after the Holy Grail: an integrated dashboard that dynamically combines data into the exact reports you need.

Learning Outcomes: How to use native Convio features to pass better data to Google Analytics, How to use advanced Google Analytics features to gain more insight into your Convio actions, Tips on more powerful ways to look at your data, using an integrated view of your web traffic and campaign data.

Speakers: Amadie Hart, Online Campaigns & Marketing Lead, Beaconfire Consulting; Joanna Miles, Online Organizer, Food & Water Watch

Topics: Data Management

PERSONAL, PROFESSIONAL OR BOTH



Monday, 2:00pm – 3:15pm
Harborside Salon B
Evaluation Code: 1096

The best organizational social media campaigns have personality behind them. But where do you draw the line between infusing your organization's accounts with personality and personally being the organization? Should you be @JaneAtNonprofit or just @Nonprofit?

Learning Outcomes: Options for identifying the person behind the organization, Guidelines for employees representing the organization, Case studies from a variety of practices.

Speakers: Carie Lewis, Director of Emerging Media, The Humane Society of the United States; Eli Feghali, Online Content Coordinator, Pathfinder International; Cheryl Black, Social Media Marketing Specialist, Convio

Topics: Integrated Marketing/Constituent Experience

SWIMMING IN THE (MULTI) CHANNEL: AN EFFECTIVE APPROACH TO ONLINE/OFFLINE FUNDRAISING



Monday, 2:00pm – 3:15pm
Harborside Salon A
Evaluation Code: 1123

Are you stumped by fundraising integration? Not sure how to plan for an online/offline campaign? Join Maureen Wallbeoff, Vice President at Firefly Partners (one of Convio's top Certified Solutions Partners) and Craig DePole, Senior Vice President at the full service direct mail firm, Newport Creative, as we take a lively look at successful integration tactics.

Learn the how-to's of integrating direct mail, online giving and other direct response tools to enhance donor relationships and results. Case studies and creative ideas will be presented on how small and large programs can operate fully integrated, multi-channelled communications and fundraising programs. This presentation will cut through the myths and misconceptions and lay out strategies that everyone can implement immediately. We'll also spend some time looking at examples of Facebook/Convio integration.

Learning Outcomes: How to use direct mail assets online, How to plan and execute an integrated campaign, Online fundraising best practices.

Speakers: Craig DePole, Senior Vice President, Newport Creative; Maureen Wallbeoff, Vice President, Firefly Partners

Topics: Multi-channel Marketing & Fundraising

STORYTELLING: WHAT'S YOUR NARRATIVE?



Monday, 2:00pm – 3:15pm
Harborside Salon C
Evaluation Code: 1133

Storytelling is what you do. At the heart of each communication that your organization puts out for the world to see, there is a story that you are telling. Join us to explore some new ways of thinking about how storytelling, and your users' interpretations of storytelling, can have an impact on your marketing and communications. We'll work our way to the big question: what's your narrative?

Learning Outcomes: Establish the importance of narrative for communicating effectively, Review some inspiring examples, Tactics for answering big questions.

Speakers: Adam Lemmon, Senior Interactive Consultant, Convio; Heather McDowell, Senior Account Manager; Convio

Topics: Integrated Marketing/Constituent Experience

SHOULD I STAY OR SHOULD I GO? MAKING STRATEGIC CRM SOFTWARE DECISIONS



Monday, 2:00pm – 3:15pm
Essex
Evaluation Code: 1158

Switching software systems is a big decision that substantially impacts your day-to-day operations, your strategies and your success. Also true and often overlooked is the fact that staying on systems that don't support you can have an even greater impact, and a negative one at that. So what should your organization do? How do you decide? This dynamic and engaging session will provide a clear plan for analyzing your current situation and the best options in front of you.

Learning Outcomes: Clarifying and prioritizing what you need from your CRM software, Evaluating systems – your own and others you might consider – in light of your primary needs, Building a case for your management and board.

Speaker: Keith Heller, Principle, Heller Consulting

Topics: Convio Luminate CRM

Product: Convio Luminate CRM

CONVIO LUMINATE™ GENERAL ROADMAP

Monday, 2:00pm – 3:15pm
Kent
Evaluation Code: 1171

Learn about the strategic direction of Convio Luminate and what new solutions and enhancements you can expect over the next 18 months. This session covers both Convio Luminate Online and Convio Luminate CRM. As a companion to this session, there are several "Convio Luminate Roadmap Breakout Sessions" where clients can participate in more detailed discussions with Convio Product Management and other clients.

Speaker: Casey Flinn, Product Strategy Manager, Convio

Product: Convio Luminate

3:45 PM

WHY CONVIO LUMINATE™ IS THE BEST ARCHITECTURE FOR CONSTITUENT ENGAGEMENT

Monday, 3:45pm – 5:00pm
Harborside Salon D
Evaluation Code: 1000

A behind the scenes look at how we will redefine what it means to have an integrated approach to your online and offline fundraising efforts. See how we have redesigned our approach from the ground up to make sure you can focus more on your mission and less on hunting for data.

We'll show you what's behind the curtain and how we are taking the best of breed technology to create the best solution for multi-channel constituent engagement. We will talk about how the Convio Online product will work with Convio CRM built on SalesForce, and how both of these products will work with our new Analytics product.

Learning Outcomes: How our data integration is improved, Why we are using three systems to build our multi-channel approach, Concrete examples of this integration in action.

Speaker: Chris Simoes, Director, Software Engineering, Convio

Topics: Multi-channel Marketing & Fundraising

Product: Convio Luminate

ELEVATE

TALES FROM THE TRAINING ROOM: STORIES, TIPS & RESOURCES TO GET YOU TO THE TOP

Monday, 3:45pm – 5:00pm
Essex
Evaluation Code: 1099

Whether you are a new Convio user or an advanced administrator, this session will cover the resources and tools you need for campaign building, reporting, maintaining your site and any questions that come up in between! We will start with a general overview of the documents and tools available to all administrators, some of the changes in the past year in training and how to use these various resources. Then we will go into some specific modules and topics with stories and tips from our training to help administrators get the inside track on solutions and best practices for Convio Luminate.

Learning Outcomes: Where to find a training path for new Convio administrators and the certification track for advanced administrators, Tips and tricks for building and maintaining your campaigns, How to find and use the plethora of documents, training, and resources available to all Convio administrators.

Speaker: Jackie Mathis, Education Specialist, Convio

Topics: Multi-channel Marketing & Fundraising

YOUR INTEGRATED MARKETING CAMPAIGN – HOW MORE IS BETTER!

Monday, 3:45pm – 5:00pm
Harborside Salon B
Evaluation Code: 1107

Using different marketing channels to acquire, engage and convert constituents to donors can be a daunting task. Stakes are high – and delivering benefits through integrated solutions is the key to growth. This session will provide strategies and tactics that can be used to create and coordinate focused direct marketing activities, from e-appeals to social media to mobile, by incorporating testing ideas and then measuring response to find out what works, what doesn't and how to join those findings for future file growth.

Learning Outcomes: How to leverage integrated marketing to improve the donor experience, How to effectively use integrated marketing to increase the size and number of contributions, How to build your analytics on the front end – to analyze results on the backend.

Speakers: Christina Johns, Director of New Media, International Fellowship of Christians & Jews; Margaux Pagan, Manager of Phone & Mobile Marketing, International Fellowship of Christians & Jews; Katie Fabbro, Senior Manager of DRTV & Multi-Media, International Fellowship of Christians & Jews

Topics: Integrated Marketing/Constituent Experience

LEMONADE, PEOPLE!

Monday, 3:45pm – 5:00pm
Harborside Salon C
Evaluation Code: 1120

Get every little detail of how Planned Parenthood Federation of America turned the most significant funding attack in its history into a movement building moment mostly because of an aggressive online program, integration with offline organizing, creative use of online tools and cohesive, visionary leadership. We'll look at each of the campaign elements (email, web, social media, video, blog, online media buys, etc.) and how they performed, as well as the organizational dynamics and staffing structure that all helped this organization make lemonade out of

a whole lot of lemons. Bonus: actual lemonade will be served!

Learning Outcomes: Integration of different campaign tactics, Organizational structure to help drive success, Integration of multiple online channels (Convio, social media, web, blog, advertising, etc.).

Speakers: Madeline Stanionis, CEO, Watershed Company; Stephanie Lauf, Director, Online Supporter Engagement, Planned Parenthood Federation of America; Will Valverde, Strategic Director, Watershed

Topics: Integrated Marketing/Constituent Experience

BE THERE.

Make sense of multi-channel interactions.
Get the insight you need to be in the right place at the right time, every time.

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SPREADS THE WORD TO OVER 450 FACEBOOK FRIENDS. INFLUENCER.

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ADVOCACY 2012: BUILDING ADVOCACY SUCCESS ON THE ELECTION CYCLE



Monday, 3:45pm – 5:00pm
Laurel
Evaluation Code: 1121

Courtesy of the Founding Fathers, the American public has the opportunity to impact federal governance in a major way every four years. But how many nonprofit organizations build their strategies with the election cycle in mind? With increased political awareness and investment also comes a chance for focused legislative priorities. But beware the cult of personality and lack of omniscience. Join us for a spirited discussion of the opportunities and challenges presented by this four year timeline.

Learning Outcomes: An understanding of long-term advocacy strategies and tactics, A checklist for your 2012 legislative priority, A planning timeline for your 2012 issue.

Speakers: Michelle Artz, Chief Associate Director, Department of Government Affairs, American Nurses Association; Felicia Carr, Senior Director of Online Communications, National Parks Conservation Association; Donna Wilkins, Founder & President, Charity Dynamics

Topics: Multi-channel Marketing & Fundraising

MORE THAN JUST AN EMAIL: SEGMENTING MESSAGES, CUSTOMIZING CONTENT & DELIVERING RESULTS



Monday, 3:45pm – 5:00pm
Harborside Salon A
Evaluation Code: 1125

Sure, you have a plan for communicating with your constituents online, but are you doing it in the most analytical way possible? Different people respond to different messages in different ways, based on their affinity to your cause and their past or current behaviors. This session will share lessons learned from segmenting online communications for some of the largest fundraising events in the country. From identifying audience segments, to targeting communications, to tracking the final results of each campaign, this session will feature strategies for increasing your marketing and fundraising results through more targeted online communication.

Learning Outcomes: How to segment with descriptive analysis

and an overview of predictive analysis, Best practices for segmentation within Convio, How to analyze the impact of your segmentation & targeting strategy.

Speaker: Kari Bodell, Director, Business Development, Event 360

Topics: Multi-channel Marketing & Fundraising

Product: Email Marketing

TOOLS TO GO BEYOND THE CHOIR

Monday, 3:45pm – 5:00pm
Harborside Salon E
Evaluation Code: 1128

Do you have the right tools and strategies to find new supporters and rapidly cultivate them into repeat activists and donors? Join M+R Strategic Services, the Human Rights Campaign, and Change.org for a discussion on how to use breaking news, online campaigns, and the Convio Constituent API to find new supporters and accelerate their engagement with your mission. We'll dig into the data of why it's important to get new constituents quickly into an effective online and multi-channel on-boarding stream.

Learning Outcomes: How to leverage the Convio constituent API to more quickly incorporate new supporters into their engagement ladder, Strategies for optimizing initial multi-channel on-boarding, How to generate supporter volume on the right issues.

Speakers: Eric Lukoff, Campaign Strategist, Change.org; Jeff Regen, Senior Vice President, Integrated Services, M+R Strategic Services; Lindsey Twombly, Associate Director, Social Media & Online Mobilization, Human Rights Campaign

Topics: Convio Technology: Best Kept Secrets and Applications of Open

Product: Email Marketing

CONVIO LUMINATE™ ROADMAP BREAKOUT SESSION: CONVIO LUMINATE™ CRM

Monday, 3:45pm – 5:00pm
Kent
Evaluation Code: 1170

This is an interactive, group session where clients are encouraged to provide feedback on the roadmap and participate in general Q&A with the Convio Product Management team and other fellow clients.

Speaker: Lori Freeman, Senior Product Manager, Convio

Topics: Convio Technology: Best Kept Secrets and Applications of Open

Product: Convio Luminate

BE READY.

Make sense of supporter behavior.
Behind every name in your database is the
opportunity to do more for your mission.

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Raised money for the run last month.
 Event Participant.

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9:30 AM

MINING CONVIO INTERACTIONS



Tuesday, 9:30am – 10:45am
Harborside Salon D
Evaluation Code: 1033

Ever wonder what you could learn from online interactions stored in Convio? The Nature Conservancy has been working with Convio to mine online constituent interactions for meaningful trends and analytical data. Come hear about the goals, challenges and lessons of this ambitious and innovative project.

Learning Outcomes: What kinds of interactions does Convio store, How TNC plans to make use of online interaction data, What some of the challenges are in working with online interactions.

Speakers: Bennet Donovan, Data Integration Manager, Convio; Dawn Ebert, Senior Systems Strategy Manager, The Nature Conservancy

Topics: Data Management

DREAM BIG WHILE KEEPING IT REAL



Tuesday, 9:30am – 10:45am
Laurel
Evaluation Code: 1039

Every new campaign, interactive project, initiative, viral message, appeal, or task begins as an idea or dream. In this session, we'll look at how to translate big ideas into realistic projects that will be ensured to succeed while being innovative and making a big impact for your organization. We'll talk about how to identify and work with technology and product limitations and what to do in the middle of projects when new ones are discovered. The audience will be encouraged to share ideas of what they have learned while working on projects from conception to launch.

Learning Outcomes: Approaches to break big ideas into manageable pieces that can more easily be understood and scoped by technical staff, How to identify risks and what can be done to mitigate them during the planning process, Methods of phasing large projects and measuring progress.

ELEVATE

Speaker: Corey Pudhorodsky, Senior Client Strategy Executive, Convio

Topics: Optimizing your Future and Executive Topics

MULTI-CHANNEL STUDY WITH CARE USA


Tuesday, 9:30am – 10:45am
Harborside Salon C
Evaluation Code: 1052

Convio conducted an integrated, multi-channel study for CARE USA. In this session, we will review: 1) Are multi-channel donors more profitable? 2) Are online donors more valuable when they convert to offline? 3) Does conversion to a second channel cannibalize giving? 4) How does lifetime value vary between online only, direct mail only and both? 5) Is donor retention greater when a donor converts to a second channel? 6) What are the giving patterns of advocates? 7) Is there an optimal time to convert a donor to a second channel? 8) Is there a profile of an online acquired donor who will convert to offline?

Learning Outcomes: The value of integrated donors, Can online giving patterns predict offline giving behaviors, How and when to convert donors to a second giving channel.

Speakers: Mike Rogers, Vice President, Strategy, Convio; Joanne Bowers, Associate Vice President, Resource Development Services, Care USA

Topics: Multi-channel Marketing & Fundraising

5 SIMPLE WAYS THAT YOU CAN ACHIEVE BREAKTHROUGH RESULTS FOR YOUR PLEDGE EVENT


Tuesday, 9:30am – 10:45am
Essex
Evaluation Code: 1066

It's the year 2021 and events have become the primary way that Gen X and Boomers are supporting charities. How can you prepare for the reality that middle-aged and younger donors (more and more) just want to have fun while raising money? And what's more telling – Gen Z is now becoming some of our best fundraisers through events. How do we get ready for an event-focused fundraising future? There are 5 key performance indicators nonprofit organizations can use to maximize the fundraising and friend-raising potential of their event now – and in the future.

Learning Outcomes: 5 KPI's for pledge events, Getting different generations of people involved in your TeamRaiser event.

Speakers: Heather McLean, Fundraising Innovation Consultant, hjc; Sam Laprade, Marketing Director, Gryphon Fundraising

Topics: Peer to Peer Fundraising

Product: TeamRaiser

KILLER CONTENT: MAKING YOUR MARKETING SOCIAL

 
Tuesday, 9:30am – 10:45am
Harborside Salon B
Evaluation Code: 1077

You may already have a presence on popular social platforms. But, are you integrating your social media efforts with other marketing and fundraising activities for greater impact? In this session, we'll talk about how to incorporate your social media efforts with other marketing efforts to get more donations, drive advocacy and give your constituents real value with the content you produce. We'll also discuss how to create an integrated

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CONVIO LUMINATE

PLAY WELL WITH OTHERS: INTEGRATING WITH OTHER SYSTEMS USING THE CONVIO APIs



Tuesday, 9:30am – 10:45am
Harborside Salon E
Evaluation Code: 1089

The most important actions on your website happen through Convio. Should they be confined to Convio pages? They don't need to be because your actions become more powerful when they integrate with your other systems. With APIs, blog comments can become letters to Congress and donations could turn into user generated content. We'll get under the hood and look at actual code examples of the APIs in action and share tips on how to make other tools play well with Convio. We'll also explore the common pitfalls of implementing such integrations and how to avoid them.

Learning Outcomes: Examples of creative integrations using Convio's APIs, Steps to make your API-driven features work smoothly, What to avoid when integrating Convio with another system.

Speakers: Joanna Miles, Online Organizer, Food & Water Watch; Paul Zumbrun, Technical Lead, Beaconfire

Topics: Convio Technology: Best Kept Secrets and Applications of Open

THINK SMALL, WIN BIG CAMPAIGNS



Tuesday, 9:30am – 10:45am
Kent
Evaluation Code: 1129

Hyper-targeting local issues for key victories is a great strategy to build momentum in both regional and national campaigns. How can all channels be engaged in this process? Join Greenpeace and Change.org in a discussion on selecting and pursuing new local targets and how to best integrate those new targets into multi-channel advocacy.

Learning Outcomes: How to target highly likely supporters, How to use Convio Luminate Online to move supporters toward online/offline advocacy, How to use Convio advocacy tools to drive momentum from local toward national movement.

Speakers: Ben Rattray, Founder & CEO, Change.org; Dionna Humphrey, Senior Email Campaigner, Greenpeace

Topics: Multi-channel Marketing & Fundraising

Product: Advocacy

THE HOLY GRAIL CHECKLIST: PLANNING A POWERFUL MULTI-CHANNEL CAMPAIGN



Tuesday, 9:30am – 10:45am
Harborside Salon A
Evaluation Code: 1142

SEO, SEM, email, Website, DRTV, social media, direct mail and more. That's a LOT of channels to coordinate when you're planning revenue-generating campaigns! If you're not an expert in all of these channels (and most of us aren't), come and learn the critical steps you need to know when setting up an integrated campaign that leverages all the channels – and most importantly – gives you measurable results you can use to optimize the next campaign. We'll show examples from recent multi-channel initiatives. This is the session for ROI and planning weenies!

Learning Outcomes: Get a checklist for planning a multi-channel campaign across the major channels, See examples of how other organizations have set up multi-channel campaigns for best results, Leave the session with a better understanding of how each channel interacts with one another.

Speakers: Liz Murphy, President & Chief Strategist, RedEngine Digital; Kelly Townsend, Manager, Online Fundraising, Humane Society of the United States; Robin Steffek, Vice President of Interactive Technology, RedEngine Digital

Topics: Multi-channel Marketing & Fundraising



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CONVIO LUMINATE™

11:00 AM

ENGAGEMENT AT ITS CORE: CREATIVE EMAIL AUDIENCE SEGMENTATION

 Tuesday, 11:00am – 12:15pm
Harborside Salon D
Evaluation Code: 1042

This session will cover the overall importance/meaning of segmentation and also the technical side of HOW to implement it (via S Tags, groups, audience selection, engagement factors, etc.). This session will be presented from both the advocacy AND the fundraising perspective.

Learning Outcomes: How to keep your email subscribers engaged with your content, How to better your open/click rates long term, How to technically implement segmenting.

Speakers: Lindsey Twombly, Associate Director, Social Media & Online Mobilization, Human Rights Campaign; Christine Dore, Project Manager, PETA

Topics: Data Management

Product: Email Marketing

HOW DO SILOED NONPROFIT ORGANIZATIONS BECOME MORE INTEGRATED?

 Tuesday, 11:00am – 12:15pm
Laurel
Evaluation Code: 1061

This challenging, executive level session will use relevant case studies to give leaders a chance to hone their skills in preparation of launching a truly integrated fundraising strategy. The interactive session will allow for a safe but frank discussion about how to improve internal culture, master budgeting conflicts, solve disruptive inter-departmental competition and create the necessary skills and structures needed to be truly innovative in fundraising.

Speakers: Mike Johnston, Founder & President, hjc; Dennis McCarthy, Vice President, Strategy & Business Practice, Convio; Rachel Muir, Manager, Go! Program, Convio

Topics: Optimizing your Future and Executive Topics

GOING MOBILE? THINK INTEGRATION

 Tuesday, 11:00am – 12:15pm
Kent
Evaluation Code: 1068

This session will showcase two groups who use both Convio and Mobile Commons and will show how they have integrated mobile into their advocacy and outreach strategies. Planned Parenthood and AARP will give attendees concrete examples of how they have used mobile successfully in their own work and share their lessons learned and best practices. Mobile Commons fully integrates with Convio's platform, enabling groups to truly use a layered approach in their outreach while going mobile. We want to help others do the same.

Learning Outcomes: How to use mobile for outreach/advocacy, Why integration is so important for any successful strategy, How technical integration makes your job easier.

Speakers: Amanda Mourant, Grassroots Organizer, Planned Parenthood; Rachel LaBruyere, Director of Mobile Strategy, Mobile Commons

Topics: Integrated Marketing/Constituent Experience

Product: Advocacy

GET A MOVE ON! THE NEW ERA OF MOVES MANAGEMENT & MAJOR GIFT FUNDRAISING

 Tuesday, 11:00am – 12:15pm
Harborside Salon B
Evaluation Code: 1081

An effective major gift program can bring in more revenue with less effort than any other fundraising strategy. But it's not easy. Hear experts describe modern strategies to find the millionaire next door and develop a methodical moves management process to cultivate and steward large gifts for your nonprofit. In this session, we'll discuss how to use your database to prospect and monitor gift opportunities. We'll demonstrate modern tools for major donor profiling and help you make the business case for investing in the right technologies.

Learning Outcomes: Best practices for using technology with their major gift programs, How to create a moves management process that fits their needs and resources, Guidelines for developing a successful major gift program.

Speakers: Jeff Schreibels, Senior Partner, Veritus Group; Tompkins Spann, Senior Solution Engineer, Convio

Topics: Multi-channel Marketing & Fundraising

LET'S GET NERDY! USING DATA TO INFORM TEAMRAISER STRATEGIES

 Tuesday, 11:00am – 12:15pm
Essex
Evaluation Code: 1085

Join your peer-to-peer event fundraising friends and get ready to learn about, share and discuss key performance metrics for your TeamRaiser event or program. The speakers will reveal benchmarks common to traditional and third-party fundraising events and share keys to success to help your TeamRaiser campaign achieve new heights.

Learning Outcomes: Key performance metrics and industry benchmarks, Best practices and innovative tactics to increase performance, What others are doing to achieve success.

Speakers: Robyn Mendez, Product Marketing Manager, Convio; Noel Beebe, Senior Consultant, Convio

Topics: Peer to Peer Fundraising

Product: TeamRaiser

MOBILE: WHERE TO START?

 Tuesday, 11:00am – 12:15pm
Harborside Salon C
Evaluation Code: 1104

Your boss is telling you "We've got to get into mobile!" But where do you start? WWF, HSUS and the National Partnership for Women & Families will share their tricks for designing a mobile website, how to use QR codes, the best ways to engage supporters via SMS and other insightful tips to take your mission mobile.

Learning Outcomes: How to determine what content to include on the mobile version of your website, How to best engage supporters via SMS, How to use QR codes for an event.

Speakers: Lara Koch, Mobile Communications Manager, The Humane Society of the United States; Jessica Sotelo, Online Marketing Manager, WWF; Tenley Peterson, New Media Manager, National Partnership for Women & Families

Topics: Integrated Marketing/Constituent Experience

CONVERT MORE DONORS – & INCREASE REVENUE 10% TO 20% – BY OPTIMIZING YOUR DONATION PAGES

 Tuesday, 11:00am – 12:15pm
Harborside Salon A
Evaluation Code: 1144

For the last four years, the U.S. Fund for UNICEF, which raised millions of dollars online last year, has been testing and optimizing the landing pages where donors enter their donations. UNICEF believes they've raised millions more dollars in that time after spending less than \$100k on testing. You'll get 5 key takeaways you can use to improve your landing page and how to begin testing to know what works best for your organization.

Learning Outcomes: What worked to increase conversions for U.S. Fund for UNICEF, What donation page changes you should test, How to implement the optimization process in your organization.

Speakers: Alisa Aydin, Managing Director, Direct & Interactive Marketing, U.S. Fund for UNICEF; Nick Allen, Chief Strategy Officer, Donordigital

Topics: Multi-channel Marketing & Fundraising

AUGMENTING CONVIO COMMON GROUND WITH SALESFORCE & APEX



Tuesday, 11:00am – 12:15pm
Harborside Salon E
Evaluation Code: 1147

This session will describe how to leverage the Salesforce platform to help augment Convio Common Ground services and Convio constituent interactions. Our example centers around the Volunteer Management system in Common Ground, which currently has no public facing signup system. We employ custom Salesforce objects and fields, Visualforce pages, Apex classes/triggers, JSONP, AJAX and custom Convio constituent fields and mapping to create a dynamic signup form which automatically assigns contacts to volunteer job shifts when they are synced from Convio to Common Ground. Attendees should consider possibilities of deeper integration between Convio and Common Ground, made possible by the Salesforce platform and simple technologies.

Learning Outcomes: An abstract model for synchronizing custom data between Convio and Common Ground/Salesforce, Basic Apex development concepts – controllers, triggers, testing, custom objects and fields, Usage of Convio Open API, Surveys, AJAX/JSONP and Google maps to create a rich and seamless user experience.

Speakers: Erland Sanborn, Database & Website Administrator, California State Parks Foundation; Greg Zelder, Director of Membership, California State Parks Foundation

Topics: Convio Technology: Best Kept Secrets and Applications of Open

Product: Common Ground

MAKING CONVIO SING: HIT THE RIGHT NOTES WITH CONVIO'S SURVEY API



Tuesday, 1:15pm – 2:30pm
Harborside Salon D
Evaluation Code: 1046

Take the Convio Survey API, add a little front-end magic, and what do you get? The Civil War Trust's online quiz. The Civil War Trust (CWT), a nonprofit devoted to the preservation of endangered Civil War battlefields, wanted a fun way to engage not only Civil War buffs, but also the more casual visitor interested in Civil War history. The trick was figuring out how to repurpose the Convio Survey API – intended as



1:15 PM

COMMON GROUND BRINGING INTERLOCHEN INTO THE 21ST CENTURY



Tuesday, 1:15pm – 2:30pm
Harborside Salon E
Evaluation Code: 1027

In the last year, Interlochen Center for the Arts has migrated from an antique on-premise ERP / CRM solution to two cloudy offerings: Enrollment Rx for Admissions to both our summer camp and high school arts academy, and Convio Common Ground for our fundraising and alumni engagement efforts. Both of these solutions reside on the Salesforce platform, a delivery model that has drastically reduced the support required by our IT department, enabling us to focus on process improvements for our business units.

Learning Outcomes: How we selected and implemented Common Ground, The significant issues we uncovered in our own data, including information that was (is) being tracked offline, The efficiencies and opportunities we're fortunate to be able to implement now that we are on Common Ground.

Speakers: Roger Valade, Executive Director of Information Technology, Interlochen Center for the Arts; Michael Slawnik, Business Architect, Interlochen Center for the Arts

Topics: Common Ground

Product: Common Ground

MAKING CONVIO SING: HIT THE RIGHT NOTES WITH CONVIO'S SURVEY API

a straightforward survey Q & A format – for a custom quiz experience. The result: a scalable, replicable application that allows for easy collection of audience data.

Learning Outcomes: The strategy and tactics behind repurposing the Convio Survey API for the CWT quiz, and the measureable results to date, How to look at other Convio APIs outside their intended uses to come up with unique applications tailored for your nonprofit's interactive experiences, How to use the Convio Survey API and Gigya in tandem to create an engaging online experience (the CWT quiz incorporates badges for users to post to their social networks once they are finished with the quiz).

Speakers: Jim Drey, IT Manager, Civil War Trust; Robert Shenk, Director of Internet Strategy & Development, Civil War Trust; Melissa Robison, Account Director, Threespot

Topics: Data Management

Product: Content Management

BUILDING COMMUNITIES THAT WORK: CLIENT CASE STUDIES



Tuesday, 1:15pm – 2:30pm
Harborside Salon C
Evaluation Code: 1055

Small World Labs online communities have helped nonprofits increase online engagement with their constituents by over 300%. Using client examples, we will take you through the process of 1) developing a community strategy, 2) implementing a community that integrates with Convio, internal processes, and social media campaigns, and 3) executing best practices activities that tie community engagement to organizational goals. Learn from the examples of others.

Learning Outcomes: How and why nonprofits are integrating an online community into their web presence, What activities and techniques nonprofits are using to build online engagement via their online community and social media, What specific results nonprofits have achieved with their online communities.

Speakers: Michael Wilson, CEO & Founder, Small World Labs; Molly Bower, Web Communications Manager, American Heart Association; Dean Alban, Director of Membership Services, Scottish Rite; Melissa Bear, Manager, Customer Marketing, CaringBridge

Topics: Integrated Marketing/Constituent Experience

EMAIL OPTIMIZATION WORKSHOP



Tuesday, 1:15pm – 2:30pm
Harborside Salon B
Evaluation Code: 1083

Email communications can be a development and marketing manager's best friend – but only if they're optimized. In the first half of this session, we'll walk through the basics of email messaging optimization techniques – including the email optimization formula.

After this intensive training, you'll have the chance to develop your new skills through interactive optimization of emails submitted by the audience prior to the Summit – potentially even your own.

Learning Outcomes: The goal of an email, Practical email optimization techniques, Email optimization formula.

Speaker: Matt Burghdoff, Email Marketing & Online Fundraising Strategist, Grizzard Communications Group

Topics: Multi-channel Marketing & Fundraising

CREATING A CUSTOM TEAMRAISER REGISTRATION FLOW ON THE OPEN API



Tuesday, 1:15pm – 2:30pm
Essex
Evaluation Code: 1100

Learn how to create a custom TeamRaiser registration flow using Convio Open APIs. This hands-on session will walk you through creating an event search, logging in or registering a user, joining or forming a team, selecting options and submitting a registration order and payment. Learn how you can customize the registration process with advanced TeamRaiser features such as registration surveys and upsells. Bring your laptop, fire up your browser, roll up your sleeves and come prepared to wrestle with some JavaScript and HTML code.

Learning Outcomes: Understand overall TeamRaiser API capabilities, Understand the details of the TeamRaiser Event registration process, Learn how to develop and deploy a custom registration page using the APIs.

Speaker: Steve Mook, Program Manager for Open, Convio

Topics: Convio Technology: Best Kept Secrets and Applications of Open

ADDING PROCESS & REPEATABILITY – GOING FROM HEROES TO PREDICTABLE OUTCOMES



Tuesday, 1:15pm – 2:30pm
Laurel
Evaluation Code: 1102

There are many ways for large and small organizations to get things done. Some rely on a few experienced heroes to drive things forward by the strength of their will and skill. Others rely on formal processes like Agile, PMI/PMP Project Mgmt, Capability Maturity Models (CMMI) or Six Sigma or GTD; though most of us have a hard time even learning about those models. Yet, we have to move things forward. We'll share highlights from several systems, a few tips and tricks to start building higher quality, consistent, repeatable process and communications in local and remote teams.

Learning Outcomes: Learn summaries of some of the popular process and productivity philosophies, Learn some of the tips and methods that we and others have used internally and with remote teams, Learn to look for areas in your organization's activity that can be automated, standardized, repurposed or simplified.

Speaker: Charlie Browning, Director of Community Engagement, Small World Labs

Topics: Optimizing your Future and Executive Topics

CONVIO LUMINATE™ ROADMAP BREAKOUT SESSION: TEAMRAISER & PEER-TO-PEER FUNDRAISING

Tuesday, 1:15pm – 2:30pm
Harborside Salon A
Evaluation Code: 1167

This is an interactive, group session where clients are encouraged to provide feedback on the roadmap, and participate in general Q&A with the Convio Product Management team and other fellow clients.

Speaker: Casey Flinn, Product Strategy Manager, Convio

Topics: Convio Technology: Best Kept Secrets and Applications of Open

Product: TeamRaiser

ELEVATE

CONVIO LUMINATE™ ROADMAP BREAKOUT SESSION: ADVOCACY



Tuesday, 1:15pm – 2:30pm
Kent
Evaluation Code: 1168

This is an interactive, group session where clients are encouraged to provide feedback on the roadmap, and participate in general Q&A with the Convio Product Management team and other fellow clients.

Learning Outcomes: Recently released features and 18-month roadmap priorities, Latest news on developing delivery standards for the Hill and Regulations.gov, Opportunity to share product feedback and make roadmap requests.

Speaker: Michelle Shefter, Product Manager, Convio

Topics: Convio Technology: Best Kept Secrets and Applications of Open

Product: Advocacy

2:45 PM

THE GOLDEN RULES OF GOOD STEWARDSHIP: TWO WORDS + THREE STEPS FOR BETTER DONOR RELATIONS



Tuesday, 2:45pm – 4:00pm
Harborside Salon E
Evaluation Code: 1040

Saying thank you isn't just polite, it's the key to cultivating small gifts into major gifts. Poor donor appreciation has financial consequences. The AFP commands and donors have the right to receive appropriate acknowledgement and recognition. Why do so many organizations lack a gift acknowledgement plan? And why do so many gifts knowingly go un-thanked? An effective individual giving program begins and ends with a prompt, gracious thank you. Learn the most efficient and impactful ways to make every donor feel appreciated, regardless of the gift or channel and create your own stewardship plan to make sure every gift is thanked.

Learning Outcomes: How to create a gift acknowledgement matrix/stewardship plan, Moves management best practices / How Common Ground supports moves management, 10 stewardship strategies for building donor relationships.

Speakers: Rachel Muir, Manager, Go! Program, Convio; Amanda Myers, Product Marketing Manager Convio

Topics: Common Ground

Product: Common Ground

YOUR DATA IS TALKING... ARE YOU LISTENING?



Tuesday, 2:45pm – 4:00pm
Harborside Salon D
Evaluation Code: 1047

From campaign results and constituent interests to areas for operational improvement, your organization's data tells a story. It can better inform your mission's work, help you raise more money, get your constituents more involved and gain more control over your projects. But, you have to be listening to what it's telling you. In this session, we'll look at proven practices and real-world examples of how you can collect and use data from your Convio products to help you: develop more compelling stories for donors, identify successful fundraising strategies, recognize trends in donor response, predict future campaign results and report on results to your board.

Learning Outcomes: Proven practices and real-world examples of how you can collect and use real-time data, "Gotchas" that you should watch out for as you collect real-time data, Practical steps for "listening" to your organization's data.

Speaker: Sandra Jensen, Co-founder, KELL Partners

Topics: Data Management

IT'S ALL IN THE TOOLS: MAXIMIZING YOUR TEAMRAISER EVENT



Tuesday, 2:45pm – 4:00pm
Harborside Salon B
Evaluation Code: 1053

Join us to navigate through the entire TeamRaiser event cycle and learn how to take full advantage of the tools available to you. Part panel presentation and part case study direct from Convio

clients (no vendors), you'll see how to apply best practices to recruit, engage and retain high performing event participants and achieve results. With topics ranging from beginner to advanced, no matter where you are in your event cycle, you will go back to your organization armed with new ideas and action items to improve your event.

Learning Outcomes: Maximize Convio's TeamRaiser, PageBuilder, Email Marketing and other tools to grow your event, Conduct analysis at every step of the process, How to keep up on best practices and new ideas.

Speakers: Jonathan Cass, E-Communications Manager, Animal Humane Society; Shana Masterson, Associate Director, Interactive Fundraising & Engagement, American Diabetes Association

Topics: Peer to Peer Fundraising

Product: TeamRaiser

11 WAYS FACEBOOK CAN HELP YOU EXTEND YOUR CONVIO WEB PROPERTIES



Tuesday, 2:45 PM – 4:00 PM
Salon C
Evaluation Code: 1095

Fish where the fish are! In social media, there are almost 600,000,000 fish in the Facebook pond. It's a good bet many of those Facebookers are your supporters. The great news is that nonprofits have tried and tested many engagement strategies to use Facebook for more than wall posts. You can easily make Facebook an extension of your Convio CRM game plan. Join us for this session to walk away with eleven tried and true Facebook strategies you should be trying today, including: 1) Building your house-file 2) Recruiting new event participants 3) Raising Money 4) And more!

Learning Outcomes: Best ways to use Facebook to extend your Convio CRM web presence, What Facebook strategies are working, Which Facebook strategies are most likely to work for your organization.

Speakers: Marie Granieri, SVP, Enterprise Wide Technologies, The Crohns & Colitis Foundation; Brooke McMillan, Online Community Manager, LIVESTRONG; Stuart Boyd, Applications Development Director, Charity Dynamics

Topics: Integrated Marketing/Constituent Experience



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- Do you want your system to **Extend Beyond Fundraising?**
- Is your **Data Dirty?**
- Do you need **System Integrations?**
- Do you worry about **User Acceptance?**

Then come talk to us at Table #5, 4th Floor in the Harborside Foyer

MANAGING ENTHUSIASM FOR INNOVATION



Tuesday, 2:45 PM – 4:00 PM
Laurel
Evaluation Code: 1115

It seems that every day there are more and more reports on mobile statistics, social media examples, examples of what other organizations are doing and new Convio feature releases. There is an abundance of opportunities and ideas. If only there was an abundance of resources! Join this session to learn how nonprofits are channeling internal enthusiasm for new ideas and assessing new opportunities, budgeting for the unknown, staffing and communicating with internal stakeholders.

Learning Outcomes: How to keep an open door for new ideas while making decisions for limited resources, Frameworks for assessing new opportunities in terms of delivering on mission and ROI, Staffing models for assessing new opportunities and then making them happen.

Speakers: Donna Wilkins, Founder & President, Charity Dynamics; Danny Bu, Principal of Interactive Fundraising, American Cancer Society; Chris Morrissey, Associate Vice President, Information Technology, National Multiple Sclerosis Society; Geoff Handy, Vice President, Media & Online Communications, Humane Society of the United States

Topics: Integrated Marketing/Constituent Experience

NO EVENT? NO PROBLEM! TEAMRAISER "OUTSIDE THE BOX"



Tuesday, 2:45 PM – 4:00 PM
Kent
Evaluation Code: 1117

Not using TeamRaiser because you don't have a run, walk or ride event? Think again! Join this session and take an in-depth look at how three organizations are thinking outside the box to leverage TeamRaiser to support their missions. From raising awareness and funds, to building a sense of community, learn how TeamRaiser can work for you well beyond the world of events.

Learning Outcomes: Ideas for leveraging TeamRaiser to support a variety of missions, How to use TeamRaiser without the fundraising component, Keeping 'virtual' events competitive.

Speakers: Jonathan Drennan, Account Director, Charity Dynamics; Doug Kingsriter, Vice President of Development, Be the Match Foundation

Topic: Peer to Peer Fundraising

Product: TeamRaiser

SURVIVING YOUR FIRST YEAR OF CONVIO



Tuesday, 2:45 PM – 4:00 PM
Salon A
Evaluation Code: 1152

Your first year of Convio can be incredibly productive if you just focus on the right things. We started our program in the summer of 2010 and sent our first email. One year and over \$400,000 in donations later we have learned a ton about how to make Convio work for us.

Find out what we learned about sending emails, content, e-commerce, analytics, PR and more. For a small nonprofit, we accomplished a great deal by following a few simple guidelines. We'll teach you how to adopt these same guidelines to make your first year of Convio an amazing success... and all without killing yourself or your boss!

Learning Outcomes: Learn how we avoided the biggest pitfall that everyone falls prey to with a new technology product, Learn how you can save thousands of dollars on donation form testing, Learn how we run a complex email and web analytics program on 2 hours a week.

Speakers: Kate Harle, Marketing Strategy & Development Officer, The Marine Mammal Center; Dale Anania, Associate Director, Annual Giving, The Marine Mammal Center; Shabbir Safdar, Chief Analytics Nerd, The Safdar Group

Topic: Multi-channel Marketing & Fundraising

Product: Fundraising & Donations

TEAMRAISER WORKSHOP: CONFIGURE, CUSTOMIZE & IMPLEMENT PARTICIPANT CENTER 2

Tuesday, 2:45 PM – 4:00 PM
Essex
Evaluation Code: 1166

Are you still using our Participant Center Classic? Don't know how to get started using Participant Center 2? Don't know why you should make the switch? Well, this is the workshop of you! In this session, we will briefly review the benefits of making the switch and then jump right into some hands on work where at the end of the workshop you will have your new Participant Center 2 configured and ready for use. This session will only focus on making basic customizations but we will review other more technical customizations that you can take back to your organization for your consideration.

Learning Outcomes: The benefits of utilizing Participant Center 2, Create a test TeamRaiser where you test your new Participant Center 2, How to maximize PC2 without a lot of effort.

Speakers: Casey Flinn, Product Strategy Manager, Convio; Mark Becker, Founding Partner, Cathexis Partners; Glen Peck, Senior Web Producer, Cathexis Partners

Topic: Peer to Peer Fundraising

Product: TeamRaiser

9:00 AM

POWER TO THE PLATFORM: CUSTOMIZING CONVIO LUMINATE™

Wednesday, 9:00 AM – 10:15 AM
Essex
Evaluation Code: 1021

Would you like Common Ground or Convio Luminate CRM to notify you when someone makes a gift of a certain size? How about a trigger that will convert a custom field on the contact record to a related list? Perhaps you'd be interested in a custom field that graphically displays the status of a donor or pledge? In this session we'll show you how!

We'll take the most common requests our support team receives and walk through the process of building solutions live.

Time permitting we'll even attempt to implement one request from the audience.

We would like this to be a very interactive session so we encourage you to bring your laptops to implement the examples along with us.

Learning Outcomes: How to build workflows, How to create formula fields, How to build a simple Trigger.

Speakers: Cliff Armstrong, Engineering Manager, Common Ground, Convio; Chuck Goss, Staff Engineer, Convio

Topic: Convio Luminate & Common Ground

Product: Convio Luminate & Common Ground

GET A LASER-LIKE FOCUS: LEARN HOW TO GET THE MOST OUT OF YOUR EVENT

Wednesday, 9:00 AM – 10:15 AM
Salon D
Evaluation Code: 1050

TeamRaiser gives you a world of possibilities with endless data, auto responder and customizations. But most of us don't have the resources to take advantage of it all – so how's an event fundraiser to focus?

If you're wondering where to start or what new tricks to try this year – this is the session for you! Learn how the Wildlife Conservation Society honed in on winning strategies by focusing on: metrics worth watching, use of prizes (you'll get a chance to win some too!), customized auto responders and recurring, automated messaging.

Learning Outcomes: How to let data drive your event strategy – metrics you should be looking at, How to get the most out of your TeamRaiser auto responders, How to use tasks and recurring messages (outside of TeamRaiser) to boost fundraising.

Speakers: Jessica Bosanko, Vice President, M+R Strategic Services; Debbie Schneiderman, Assistant Director, Online Programs, Bronx Zoo / Wildlife Conservation Society

Topic: Peer to Peer Fundraising

Product: TeamRaiser

ONE DONOR, MANY CHANNELS: WINNING STRATEGIES IN A MULTI-CHANNEL ENVIRONMENT

Wednesday, 9:00 AM – 10:15 AM
Salon C
Evaluation Code: 1073

Research shows that regardless of how people give – online or through traditional direct marketing – today's donor prefers and expects to engage through a variety of channels. In fact, donors who have engaged through both online and offline platforms have proven to be more generous than donors who only connect with an organization through one medium. In this session, we'll look at trends in donor behavior across marketing channels. We'll also discuss case studies of effective integrated marketing campaigns that allow donors to respond via the right channel at the right time and new opportunities for interested organizations to master the basics of online and integrated marketing.

Learning Outcomes: Trends in donor behavior across marketing channels, Case studies of effective integrated marketing campaigns, How to inspire donors to respond via the right channel at the right time.

Speakers: Rachel Muir, Manager, Go! Program, Convio; Debbi Barber, President, Grizzard Communications Group

Topic: Integrated Marketing/Constituent Experience

ALL ROADS (SHOULD) POINT TO SUSTAINERS

Wednesday, 9:00 AM – 10:15 AM
Salon B
Evaluation Code: 1105

This session includes an overview of why sustaining donors are so valuable for nonprofits; why multi-channel efforts should promote sustaining offers and how those response rates – and offers – can and should vary; why a sustaining donor is (usually!) more valuable than a one-time donor; and who and when to ask to become a sustaining donor. Plus, a few tips for maximizing your successful monthly donations, reporting and more!

Learning Outcomes: Why a sustaining donor is so valuable, How to maximize ongoing revenue using Convio's credit card features, How to convert a one-time donor to a sustainer.

Speakers: David Glass, Director, Online Marketing, WWF; Sally Heaven, Lead Account Manager, Convio

Topic: Multi-channel Marketing & Fundraising

Product: Fundraising & Donations

CHANGE MANAGEMENT: TURNING TECHNOLOGY EVOLUTION INTO A REVOLUTION!

Wednesday, 9:00 AM – 10:15 AM
Laurel
Evaluation Code: 1160

In large federated organizations, making the case for change and preparing for it can be just as important as the technology and tools that are underneath the hood. Speaking in this session are two individuals representing the American Cancer Society (David Balcom) and Susan G. Komen for the Cure (Eric Montgomery), who tackled making the case for change and the art of change management in two very different approaches. You'll hear from the American Cancer Society on how an examination of user data and key metrics drove a very different approach to re-examine strategy and engagement from a user perspective. Where at Susan G. Komen, their team decided a technology platform change was required to support their long term strategy with a focus on change management and affiliate readiness.

Learning Outcomes: Strategic organizational goals should drive the need for change, not technology bells and whistles, Large change initiatives need to have clear success metrics and early wins, Technology can be one component, but success is usually more tied to people, goal alignment and process change.

Speakers: Bethany Little, VP, Enterprise Client Services, Convio; Eric Montgomery, Manager, IT Programs & Projects, Susan G. Komen for the Cure; David Balcom, Managing Director, Digital Activation, American Cancer Society.

Topic: Optimizing your Future and Executive Topics

OPTIMIZING CAMPAIGN PERFORMANCE

 Wednesday, 9:00 AM – 10:15 AM
Salon E
Evaluation Code: 1163

The amount of data being collected in CRM and marketing databases is growing exponentially each year. How does the savvy fundraiser make use of this treasure trove of actionable insights? Join this session to learn how!

Learning Outcomes: How can segmentation strategies be optimized beyond traditional RFM methodologies, Can third party data help identify sub-segments of profitable donors within unprofitable segments, How can identifying unique donor groups improve fundraising performance.

Speakers: Mike Rogers, Vice President, Strategy, Convio; Katie Beth DeSchepper, Manager, Marketing Strategy, Convio

Topic: Convio Technology: Best Kept Secrets and Applications of Open

CONVIO LUMINATE™ AFTER SUMMIT – WHERE DO YOU GO FROM HERE

 Wednesday, 9am – 10:15am
Kent
Evaluation Code: 1172

Intrigued by Convio Luminate and want to think through how to share the news with your home team? This session will introduce you to how your peers have influenced their organizations to begin practicing constituent engagement using Convio Luminate. For example: How can you approach starting the conversation with your organization? What benefits are most likely to interest your colleagues based on their roles? What are common themes you might expect to discuss? Join us for an open conversation with the experts and the whole room, and go home ready to explore bringing your organization into the light.

Speakers: Amanda Boone, Director of Database Management & Development Operations, League of Conservation Voters; Isaac Heger, Director of Fundraising Technology, Jewish National Fund

Topic: Convio Luminate

Product: Convio Luminate

SOCIAL MEDIA MASTERS & GORGEOUSLY GROOMED GRASSROOTS: HOW CITIZENS GET THEIR MESSAGE HEARD ON CAPITOL HILL IN THE INTERNET AGE

  Wednesday, 10:30 AM – 11:45 AM
Laurel
Evaluation Code: 1084

How has the internet changed constituent communications on Capitol Hill? Managing “constituent mail” – which includes postal mail, email, faxes, phone calls, and social media – is one of the most time-consuming tasks congressional offices face. It is also one of the most important. Many congressional offices are feeling frustrated and overwhelmed with the volume of communications they receive and they tend to mistrust identical form message campaigns. This session will offer insights on how congressional offices are handling constituent mail and how they perceive it. The session will address: how long it takes offices to respond to postal mail and email, and factors which impede faster response rates; how Congress is using social media to communicate Members/Senators views and to understand public opinion and constituent's views and the impact technology has on staffers' perceptions – and trust – of constituent communications; how Members, Senators and different congressional staffers are involved in constituent mail, and the five obstacles to turning your advocates into SUPER-advocates and how to overcome them.

Learning Outcomes: How Congress is using and is being influenced by social media, How do congressional offices respond to communications, What are the most influential communications strategies targeted to a congressional office.

Speaker: Bradford Fitch, President & CEO, Congressional Management Foundation

Topic: Multi-channel Marketing & Fundraising

TRENDS IN PAYMENT PROCESSING & SECRETS THE CREDIT CARD COMPANIES WON'T TELL YOU!



Wednesday, 10:30 AM – 11:45 AM
Salon B
Evaluation Code: 1110

We will look at the trends in the payment processing industry and how Direct Debit (ACH) is a rapidly growing product that many nonprofits are not using. We will discuss common terms that you need to understand in order to control your processing cost such as interchange, association fees, qualified/non-qualified, etc. We will also provide some discussion about PCI Compliance, new IRS requirements and new government regulations. All the things you need to know about in order to attempt to control your processing cost and why they will likely continue to increase.

Learning Outcomes: What the current trends are in payment processing and how it operates, How the different pricing models and how to try and control processing cost, Learn about the new IRS rules and the impact on Charities.

Speaker: Tom Eplett, COO, IATS Payments, Inc.

Topic: Multi-channel Marketing & Fundraising

PREDICTING DONOR BEHAVIOR



Wednesday, 10:30 AM – 11:45 AM
Salon E
Evaluation Code: 1164

There is power in prediction! Being able to identify future behaviors of your donors can be worth gold. Most nonprofits under-utilize the predictive nature of their data due to lack of specific data modeling knowledge. Let us share strategies that can dramatically improve your fundraising performance with the use of predictive modeling.

Learning Outcomes: Removing the 'black box' of predictive modeling, How to build an ROI case for using predictive modeling within your fundraising program, Case studies to demonstrate the power of prediction.

Speakers: Mike Rogers, Vice President, Strategy, Convio; Christie Fogarty, Associate Director of Membership Programs, The Heritage Foundation; Katie Beth DeSchepper, Manager, Marketing Strategy, Convio

Topics: Multi-channel Marketing & Fundraising

CONVERTING TEAMRAISER DONORS TO LIFELONG SUPPORTERS



Wednesday, 10:30 AM – 11:45 AM
Essex
Evaluation Code: 1165

A TeamRaiser event can leverage your constituent's networks to enable your organization to reach a previously unreachable audience. Your TeamRaiser participants become ambassadors for your organization, enthusiastically evangelizing about the services your organization provides. But how do you convert TeamRaiser donors to become lifelong donors, volunteers and advocates for your organization? This session will explore the inherent challenges in engaging TeamRaiser donors and proven strategies for overcoming those challenges.

Learning Outcomes: Importance of treating TeamRaiser donors in a unique way, Strategies for leveraging TeamRaiser participants as ambassadors, Using TeamRaiser as an acquisition and list-building tool.

Speaker: Derek Martin, Solutions Engineer, Convio

Topic: Peer to Peer Fundraising

Product: TeamRaiser

1:00 PM

ACTIVISTS DON'T LIKE SILOS: HOW TO APPLY A MULTI-CHANNEL APPROACH TO CONVERTING THEM TO DONORS



Wednesday, 1:00 PM – 2:15 PM
Salon B
Evaluation Code: 1031

In the drive to convert activists to donors, many nonprofits are leaving money (and members!) on the table by not using all of the channels available. Come hear the National Parks Conservation Association present a case study about how they tested converting their activists through the mail, phone and web channels to maximize results, and what else they've done to build their online acquisition program.

SAVE TIME, LEARN MORE, DO MORE: FREE KIT WORKSHOP



Wednesday, 1:00 PM – 2:15 PM
Essex
Evaluation Code: 1087

Learning Outcomes: Ideas for how to apply multi-channel strategies to your program, When and with how many points of contact you should try to convert activists, More ways that NPCA and you can try to further test the multi-channel approach.

Speakers: Laura Connors, Deputy Vice President for Membership, National Parks Conservation Association; Barb Perell, Vice President of Online Fundraising, Avalon Consulting

Topic: Integrated Marketing/Constituent Experience

The first part of this workshop will introduce you to our currently available kits, break down their components and show examples of clients who have implemented our kits to launch great new campaigns for their organization. The second part will concentrate on getting hands-on as we walk through the setup of a new mini-kit developed just for this workshop. You will leave the session being able to download and implement this kit into your fundraising strategy the moment you get home!

This session is perfect for anyone looking for ways to learn best practices and quickly and easily put them into practice, even if they have never looked at code or built a campaign before!

Learning Outcomes: Free kits are available for download to save you time and money, Turning the WYSIWYG off isn't as scary as you might think, By starting from a template you can do more with the same amount of time.

Speaker: Ken Cantu, Program Manager, Convio

Topic: Convio Technology: Best Kept Secrets and Applications of Open

Product: Email Marketing

CONVIO LUMINATE™ ROADMAP BREAKOUT SESSION: MULTI-CHANNEL MARKETING

Monday, 2:00pm – 3:15pm
Kent
Evaluation Code: 1169

This is an interactive, group session where clients are encouraged to provide feedback on the product roadmap and participate in general Q&A with the Convio Product Management team and other fellow clients. Content will be focused on: Email, Fundraising, Direct Mail, Mobile, Social, and CMS.

Learning Outcomes: Understand the Convio product vision for multi-channel marketing, Grasp the timing of multi-channel marketing features.

Speakers: Kevin Suer, Senior Product Manager, Convio; Timothy Grailer, Product Manager, Convio

Topics: Convio Technology: Best Kept Secrets and Applications of Open

STRATEGIES FOR DATA INTEGRATION TO IMPROVE WORKFLOW AND ACCESS



Wednesday, 1:00 PM – 2:15 PM
Salon A
Evaluation Code: 1106

DMS and CRM systems accomplish the common objective of organizing, automating and synchronizing data and business processes related to finding, attracting and winning new constituents. Integrating screening and other research data into the organization's DMS/CRM is a key to enhancing data-driven workflows and data access within high-performing organizations. This session explores the benefits, considerations and challenges of DMS/CRM integration. Learn the primary advantages of integrating wealth data into your DMS, including improved access to global profiles of constituents, better segmentation, moves management and tracking of prospects. This session will present several case studies of the integrations with DMS and CRM systems.

Learning Outcomes: Learn the benefits of integrating prospect research and screening with the DMS. Discover the key factors to consider when planning and executing a DMS integration (including determining the level and complexity of integration that is required, the type of DMS/CRM that the organization uses, the need to validate the data, and the timeframe and steps for execution). Understand the key obstacles of data integration and learn how to overcome them in the planning process.

Speakers: Elizabeth Schiffmann, Product Marketing Manager, WealthEngine; Keith Heller, Principal, Heller Consulting

Topic: Data Management

Product: TeamRaiser

ANALYSIS INTO ACTION: USING REPORTING TO IMPACT RESULTS TODAY



Wednesday, 1:00 PM – 2:15 PM
Salon D
Evaluation Code: 1138

Don't wait until the end of your event or the close of your fiscal year to analyze your data! By then, it's too late to impact change – walking shoes are put away and credit cards are tucked neatly back into wallets. You have powerful reporting tools at your fingertips – do you know how to use them to increase your fundraising in real time? This session will help you put those rows of Excel data into action. We'll cover how to capitalize on specific participant or donor actions, like self-donation, and how to propel those into increased participant engagement and fundraising.

Learning Outcomes: How to set up your forms in order to get better information. Look at the actual report writer in Convio to get more personalized information. Come away with a translation guide to turn an excel document into an action plan.

Speaker: Laurie Schaecher, Senior Fundraising Data Consultant, Event 360

Topic: Data Management

Product: TeamRaiser

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Whether your organization has an in-house technology staff or you are just getting started with online communications, **Cathexis Partners** can help you improve your use of technology to raise funds and spread awareness of your mission.



CATHEXIS [KUH-THEK-SIS] - NOUN

1. Concentration of emotional energy on an object or idea.
2. The investment of emotional significance in an activity.